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Changes in South Africa's global agricultural trade regime, 1996-2013

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ABSTRACT

This paper presents an examination of the major trends in South African international trade in agricultural products between the years 1996 and 2013. The analysis covers three broad areas: (1) the changing weight of key trading partners in South Africa's overall agricultural trade regime; (2) changes in the major products being traded with the rest of the world; and (3) changes in the products being traded with each of its key trading partners. The paper begins by analysing the changes in the total export and total import values to and from the trading partners identified above, and the changing shares of total value held by each partner. The next section focuses on the major products traded in terms of value – both how the composition of the product profile has transformed, and the main sources of the trade in these products. Finally, each trading partner is given individual focus. The EU remained the dominant source of imports and the dominant destination for exports throughout the period. The import market shifted dramatically away from the US and Africa toward Brazil and China. In the export market, the presence of the USA, Japan and MERCUSOR receded whilst Africa and China underwent strong growth. The top two export destinations, the EU and Africa, dominated the market by a significant margin, accounting for well over half of total export value throughout. Rice and wheat were the dominant products within the import market throughout the period, whilst the position of poultry meat strengthened and sunflower-seed oil receded. In poultry meat imports, the USA saw sharp decline, whilst South America and the EU underwent a very strong rise. The major shifts in the export market were away from sugar and titanium oxide, and towards fresh fruit and wine.

Keywords: agriculture, international trade, global partners, exports, imports

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ACRONYMS

ASEAN	Association of Southeast Asian Nations
BRIC	Brazil, Russia, India and China
EU	European Union
GTA	Global Trade Atlas
HS	Harmonised system code
Mercosur	Mercado Común Del Sur
NESOI	Not Elsewhere Specified or Included
UAE	United Arab Emirates
USA	United States of America
WCO	World Customs Organization
WTO	World Trade Organization

GLOSSARY

Harmonised system code

The Harmonised Commodity Description and Coding System generally referred to as "Harmonised System" or simply "HS" is a multipurpose international product nomenclature developed by the World Customs Organization (WCO).

It comprises about 5,000 commodity groups; each identified by a six digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification.

The system is used by more than 200 countries and economies as a basis for their Customs tariffs and for the collecting international trade statistics. Over 98 % of the merchandise in international trade is classified in terms of the HS (WCO, 2012).

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1. INTRODUCTION

This paper presents an examination of the major trends in South African international trade in agricultural products between the years 1996 and 2013. The analysis covers three broad areas:

1. the changing weight of key trading partners in South Africa's overall agricultural trade;
2. changes in the major products being traded between South Africa and the rest of the world; and
3. changes in the products being traded between South Africa and each of its key trading partners.

The key trading partners identified here are, in order of total trade value with South Africa (imports and exports): the European Union (EU), the African continent, the BRIC group (Brazil, Russia, India and China), the Mercado Común Del Sur (Mercosur), the Association of Southeast Asian Nations (ASEAN), China, the United States of America (USA), Brazil, India, Japan and Russia. Since the aim of the paper is to examine the broad patterns of South Africa's global agricultural trade, a number of individual countries with a central presence in South Africa's agricultural trade, such as Argentina, Thailand, Malaysia and the member states of the EU, have in this analysis been subsumed into regional economic organisations of which they are members. The individual countries constituting the BRIC group are included because, though trends in trade with the group give an important insight into overall patterns of global trade, the group itself does not represent a regional trading bloc, and compared to the other groups included is not strongly economically integrated. It is, therefore, essential to examine the developments in the individual countries that drive the changes in trade patterns with the wider group.

The paper begins by analysing the changes in the total export and total import values to and from the trading partners identified above, and the changing shares of total value held by each partner. The next section focuses on the major products traded in terms of value: how the composition of the product profile has transformed, and what are the main sources of trade in these products. Finally, each trading partner is given individual focus. The changes in the key products imported and exported are explored. From this, trends can be identified that would be either too small or too partner-specific to be picked up from the overall picture.

By exploring the kinds of products traded with a range of trading partners, insight is given into whether growth in trade has taken place at the intensive or extensive margin. Growth in the intensive margin involves exporting the same products to the same partners in greater volume or at a greater price per unit. Growth in the extensive margin involves exporting new products or trading with new partners. While growth at the intensive margin indicates the utilisation of comparative advantage, growth at the extensive margin is associated with reduced vulnerability to price shocks and harvest volatility, as well as being reflective of an innovative economy. This approach to the analysis of growth is a relatively recent development in the literature, and allows for a more nuanced understanding of a country's economic progress (Liapis, 2011: 10).

The work carried out here is intended to serve as a platform to help strengthen research into the changing nature of South Africa's agricultural sector and the effects of national and international policies implemented over the period (including those relating to tariff regimes, trade agreements, market liberalisation and land reform) and to provide some context for future policy development.

For the purposes of this study, agricultural products are understood in terms of the World Trade Organisation (WTO) definition. This essentially comprises the Harmonised System Code

(HS) chapters 1 to 24, with the exception of forestry and fishery products, as well as a number of additional products from later HS chapters, including animal skins and hides, wool, cotton and essential oils (World Trade Organisation, 1994: 58). The source of the data used is the Global Trade Atlas (GTA) database.¹

A number of limitations to the analysis must be noted. Firstly, the values displayed are nominal rather than being in inflation-adjusted real terms. Upward inflationary pressure raises the nominal value of trade, giving the impression of there being more growth in trade than actually took place. (This is complicated further by the fact that the level of inflation varies year on year.) Secondly, this paper does not explore changes in volumes traded or the price of traded goods, which would provide insight into the developments that are driving growth. Potelwa, Mugobi and Sandrey examined changes in the prices of agricultural goods between 2007 and 2012, and found that, on average, export prices rose more than import prices (2013: 3). The average price of orange exports grew by 59% and of wine exports by 82%, while the price of rice exports doubled (Potelwa, Mugobi and Sandrey, 2013: 19). By focusing on value, it is evident how both inflation and shifting exchange rates influence the changes shown by the figures. Further research into volumes traded and changes in the inflation-adjusted value of trade would indeed be valuable. However, focus on value is useful in that it allows the comparison of changes in highly diverse goods and reflects their relative importance within the trade profile of a particular economy. Lastly, the scope of this paper, being centred on the South African economy, did not allow for an exploration of the presence of South African exports in the import markets of its trading partners.² In terms of directions for future research, a disaggregation of the overall trade figures into broader product groupings, such as primary and secondary goods, and an examination of the trading partners involved in the changes in these groupings, would deepen our understanding of how the nature of the South African agricultural sector and its global trade regime is transforming.

In the tables presented, market shares are displayed on a biennial basis. This can mean that anomalies may skew annual figures that would otherwise fit the general pattern. However, displaying the data in this way gives a clear, accessible demonstration of broad, long term trends, and mitigates the particularities of any one year (Liapis, 2011: 20).

1.1 Overview of the findings

The value of South Africa's exports grew by a greater amount than imports, finishing in 2013 with a value of R74.9 billion compared to R58.8 billion for imports. The growth rate of export value soared in the final year, with almost a third of total growth taking place between 2012 and 2013. The balance of trade was positive throughout, but fluctuated greatly, falling as low as R0.7 billion in 2007.

The EU was the dominant source of imports and the dominant destination for exports throughout, accounting for between a quarter and a third of the total import market value and over 30% of the export market value for the entire period. The import market shifted dramatically away from the USA and to a lesser extent from Africa, toward the BRIC group (in particular toward Brazil and China). ASEAN maintained a strong presence of roughly an eighth of the market, aside from a spike that occurred between 2008 and 2011. In the export market, the presence of the USA, Japan and Mercosur receded, while Africa and China underwent strong growth. The top two export destinations, the EU and the continent of Africa, dominated the

¹ The data was sourced in partnership with the Tralac Trade and Law Centre in Stellenbosch during their 2014 'Geek Week' conference. The Global Trade Atlas database used was compiled by Global Trade Information Services using data from the South African Revenue Service (SARS), and is available at www.gtis.com

² Sandrey, Ron and Vink (2006) examine South African agricultural exports within the import markets of China and India, finding South Africa to have held market shares of just 0.18% and 0.51% respectively in 2005.

market by a significant margin, accounting for well over half of total export value throughout. Africa closed the gap between itself and the EU from 13.5 to 1.5 percentage points. Rice and wheat were the dominant products within the import market throughout the period, while the position of poultry meat strengthened and sunflower-seed oil receded. Thailand, India, and China accounted for around a third of rice imports each by the end of the period, though China only became such a significant source after 2011. The composition of import sources for wheat transformed dramatically, with the USA falling from a 52.0% to a 3.2% market share, and the rise of Ukraine, Russia and Brazil as sources for wheat. In poultry meat imports, the USA again saw sharp decline, while South America underwent a very strong rise. Brazil saw staggering growth from an initial market share of 7.1% to over three quarters of total market value towards the middle of the period. This market share receded somewhat after 2011 due to the rise of the EU, which finished as top source for poultry meat imports.

The major shifts in the export market were away from sugar and titanium oxide, and towards fresh fruit. Citrus fruit, apples, pears, quinces and grapes made up 27.1% of total market value. The market share of wine also doubled to 10.5%, making it the second most valuable export. Most of the value of fresh fruit and wine exports went to the EU, though the proportion held fell in each case. The geographical centre of fresh fruit exports shifted east, towards Russia, China, Malaysia and the Middle East (which accounted for a fifth of citrus fruit export value by the end of the period). Maize was also a major export throughout, though in terms of sources it was extremely volatile, with dominance shifting between Japan, Mexico, Zimbabwe and South Korea. Acyclic and ethyl alcohol grew to be the dominant products exported to South America, with their combined market share growing from 2.4% to 55.2% in the Brazilian market and 2.3% to 56.2% in the Mercosur market.

2. TRENDS IN SOUTH AFRICA'S AGRICULTURAL TRADE WITH KEY INTERNATIONAL TRADING PARTNERS

2.1 Overview

This section analyses trade flow changes relating to South Africa's major international trading partners. The partners identified here are the EU, the African continent, the BRIC, Mercosur and ASEAN groups, as well as China, the USA, Brazil, India, Japan and Russia.

The value of total agricultural exports from South Africa grew from R12.5 billion to R74.9 billion. The value of total agricultural imports into South Africa grew at a stronger rate from R7.9 billion to R58.8 billion. The balance of trade in agricultural goods, as shown in *Figure 1*, was positive throughout the period. It experienced steady growth between 1996 and 2003, after which it became much more unstable, hitting a low point of R0.7 billion in 2007 and a peak of R16.1 billion in 2013.³

The EU was both the major source of agricultural imports and the major destination of agricultural exports for the entire period. In terms of imports, it accounted for between roughly a quarter and a third of the market throughout, and finished the period at a peak in terms of market share. The import market shifted away from the USA and Africa, and towards the BRIC and Mercosur groups. Mercosur was in fact the chief import source in 2004, and between 2006 and 2008 (see *Figure 2*). The proportion of the market made up by the USA fell dramatically from 15.1% to 4.6%. Growth in the BRIC group was driven largely by Brazil and China, both of whose market shares ended four times higher than the levels at which they began. The ASEAN

³ Potelwa, Mugobi and Sandrey (2013: 4) note that South Africa is 'one of very few' countries that reports import figures in terms of only the cost on board figures, rather than including the insurance and freight costs in the total value. This means that, if import figures were reported in the manner most widely used globally, they would be as much as 10% higher, and the balance of trade would be significantly different.

group also remained a central import source throughout, accounting for between 10% and 20% of the market.

Figure 1: South Africa's balance of trade in agricultural products

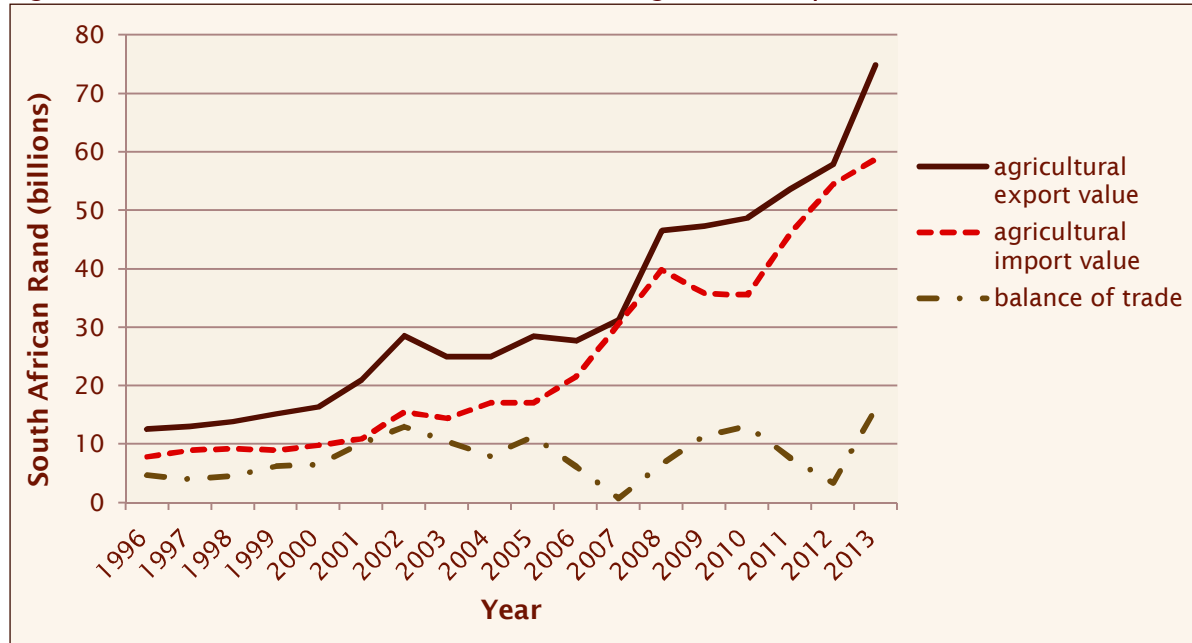
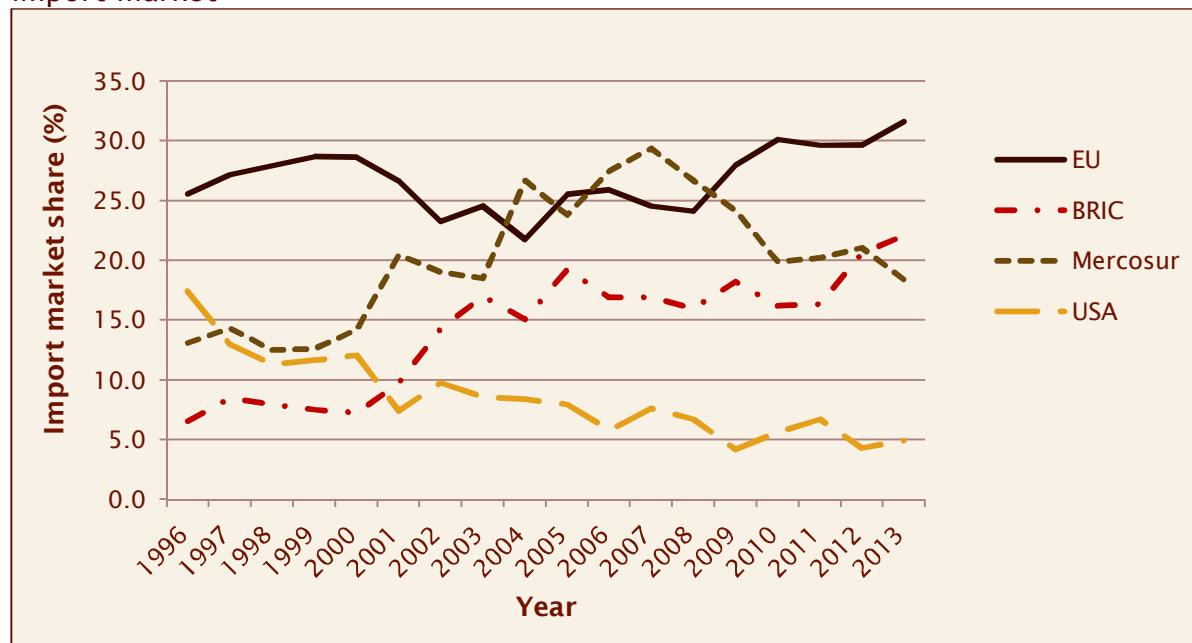
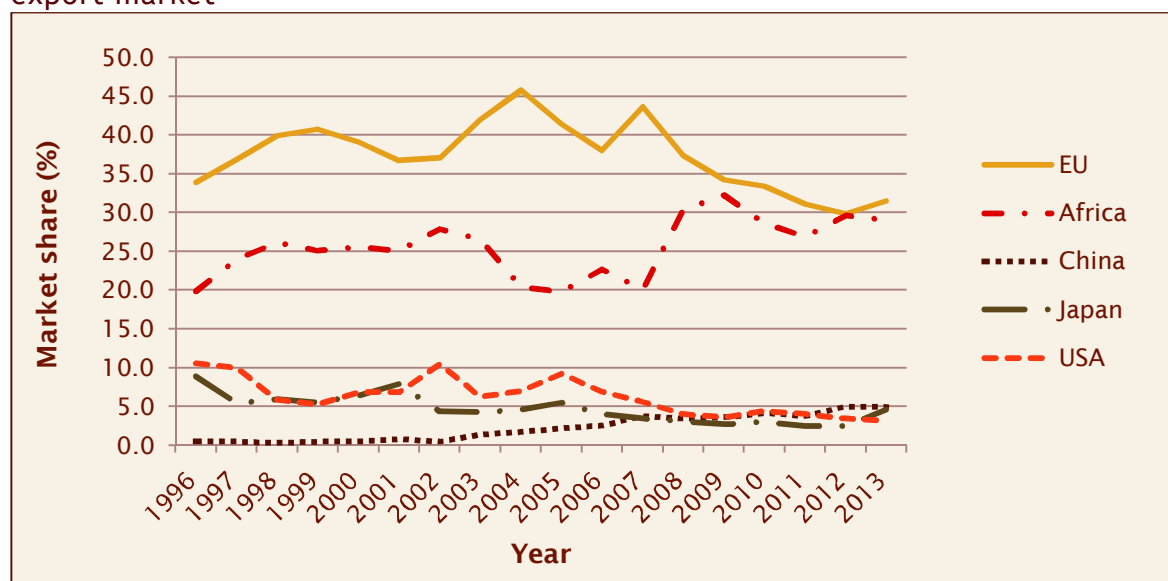


Figure 2: Key trends in the source composition of South Africa's agricultural import market



The value of the export market soared between 2012 and 2013 from R57.9 billion to R74.9 billion (see Figure 3). In terms of destinations, the major shifts were away from Japan, the USA and Mercosur, and towards Africa and China. The EU retained a market share of above 30% throughout, peaking towards the middle of the period and then receding to levels somewhat below its initial share. The African continent, the second largest destination, closed the gap on the EU from 13.5 to just 1.5 percentage points. These two destinations accounted for well over half of total export value for the entirety of the period. China was the main force behind growth in the BRIC group, Brazil having undergone a crash in 1998 from which it did not recover.

Figure 3: Key trends in the destination composition of South Africa's agricultural export market



2.2 Import value and market composition

The total import value of agricultural products rose from R7.9 billion in 1996 to R58.8 billion in 2013 (see *Table 2*) — more than seven times its initial value. Most of this growth (R41.7 billion) occurred in the second half of the period. Notably, overall import value fell between 2008 and 2009 from R39.9 billion to R35.8 billion, not recovering until 2011 (R46.1 billion). While the EU maintained its central position, the period saw a shift away from the USA towards the BRIC and Mercosur groups as the major import sources. Between the four country groups examined (the EU, BRIC, Mercosur and ASEAN), total market share held rose from 59.2% between 1996 and 1997 to 85.6% between 2012 and 2013 (see *Table 1*).

The EU held a dominant position throughout, although was overtaken by Mercosur in 2004 and between 2006 and 2008. This was largely due to a sharp rise in the import value from Mercosur from R2.7 billion to R4.5 billion between 2003 and 2004, after which it receded somewhat in both value and market share, finishing at R10.8 billion with 19.7% market share. The EU held the top position from 2009 onwards, rising in terms of both value and market share to a peak of 30.7% at R18.6 billion.

The BRIC group saw the greatest rate of growth of the sources examined, from R519 million to R13.0 billion over the period. Within the group, Brazil and China, at R4.8 billion and R4.3 billion, respectively, were the major import sources. India, which had been the major import source between 1996 and 2001, was close behind at R3.1 billion, while Russia made up R803m. The BRIC group overtook Mercosur, ASEAN, the African continent and the USA to become the second highest import source examined after the EU, constituting 21.4% of total import value.

The ASEAN group underwent a relatively steady rise between 1996 and 2007 from R918 million to R4.2 billion, after which it almost doubled to a peak of R8 billion. Because of this, market share reached an unprecedented high of 19.2% between 2008 and 2009. Value dropped in 2008 to R6.5 billion, after which imports from the group steadily rose to a final value of R7.8 billion, and a market share of 13.8%. The USA began as the largest import source of any individual country, with 15.1% of total market share. However, import value declined from R1.4 billion in 1996 to R808 million in 2001, after which it underwent gradual, unsteady growth to R2.9 billion in 2013 (with 4.6% market share).

Table 1: Import value of agricultural products (%), 1996-2013

Import source	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	26.4	28.3	27.6	23.9	23.6	25.1	25.9	29.9	30.7
BRIC	7.6	7.7	8.6	15.6	17.2	16.9	17.1	16.3	21.4
Mercosur	13.7	12.6	17.5	18.8	25.2	28.6	25.5	20.1	19.7
ASEAN	11.5	14.4	12.7	13.3	14.6	13.4	19.2	17.4	13.8
Brazil	2.1	1.6	3.6	6.7	10.6	8.7	9.3	7.6	8.0
China	1.6	2.3	2.4	4.5	3.1	4.1	4.8	5.0	7.7
Africa	10.1	11.3	10.7	11.1	8.7	6.5	5.6	6.2	6.2
India	3.8	3.7	2.5	4.2	3.3	4.2	2.7	3.3	4.7
USA	15.1	11.5	9.6	9.2	8.2	6.9	5.5	6.3	4.6
Russia	0.2	0.1	0.1	0.2	0.1	0.1	0.3	0.4	0.9
Japan	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1

2.3 Export value and market composition

Over the period, total export value rose almost sixfold, from R12.5 billion to R74.9 billion (see *Table 3*). Most of this growth (R46.4 billion) took place in the second half of the period, with a huge jump in value between 2012 (R57.9 billion) and 2013. The major shifts were towards Africa and China, and away from Japan, the USA and Mercosur. Together, Africa and the EU consistently made up over half of the total market value throughout the period.

The EU dominated the market throughout, growing from R4.3 billion to R23.6 billion between 1996 and 2013. It saw an overall decline in market share – it began with 35.4% (see *Table 4*), peaked in 2004–5 at 43.5% and ended on 30.8%. The value of exports to the rest of Africa rose from R2.5 billion to R21.7 billion. A significant surge occurred between 2007 (R6.3 billion) and 2008 (R14.1 billion). In terms of market share, Africa closed the gap between itself and the EU, from 13.4 to just 1.5 percentage points.

The BRIC group made up 8.6% of the total market in 2012–13. The value of exports to the BRIC countries fell from R574 million in 1996 to 231 million in 2000. This was largely due to the decline seen in what was by far the largest component of the BRIC group, Brazil, from R382 million in 1996 to R26 million in 1999 (from which it did not recover, finishing on R270 million – the smallest of the BRICs).

China finished as top export destination of the BRIC group with 5% market share, overtaking Japan, ASEAN, the USA, Russia, Mercosur and Brazil. Japan began with 7.1% of the market share, but dropped to a low of 3.7% by the end of the period. Between 1996 and 1997 value of exports to Japan fell from R1.1 billion to R701million, and growth over the remainder of the period largely failed to keep up with the growth in exports to other destinations. Value jumped up from R1.4 billion in 2012 to R3.4 billion in 2013.

Exports to the ASEAN group rose from R452 million (2.8% market share) to R3.2 billion (4.7%). ASEAN overtook Mercosur, whose market share fell from 4.7% to 0.5%, and who, like Brazil, finished with an export value below its 1996 level. As with imports, the USA fell from being the largest export destination of any individual country (10.2% market share) to a considerably lower position (3.3%).

Table 2: Import value of agricultural products in Rands (millions), 1996-2013

Import source	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	7 903	8 983	9 286	8 970	9 857	10 879	15 533	14 454	17 020	17 084	21 504	30 591	39 892	35 836	35 584	46 080	54 522	58 775
EU	2 019	2 440	2 596	2 572	2 820	2 899	3 612	3 546	3 705	4 358	5 567	7 515	9 627	10 023	10 717	13 669	16 148	18 591
BRIC	519	761	737	676	713	1 063	2 216	2 457	2 562	3 288	3 637	5 190	6 384	6 541	5 771	7 537	11 221	12 988
Mercosur	1 033	1 288	1 162	1 131	1 399	2 230	2 954	2 676	4 541	4 064	5 912	8 988	10 653	8 665	7 075	9 316	11 476	10 815
ASEAN	918	1 020	1 280	1 345	1 189	1 450	1 981	2 017	2 547	2 440	2 785	4 190	7 993	6 511	6 506	7 720	7 847	7 827
Brazil	179	168	154	141	206	536	1005	1 000	1 625	2 003	1 803	2 709	3 559	3 469	2 638	3 605	4 359	4 750
China	108	157	198	228	246	248	536	828	487	569	841	1 273	1 663	1 989	1 932	2 122	4 399	4 318
Africa	801	900	1 110	957	971	1 253	1 727	1 590	1 657	1 309	1 447	1 960	2 124	2 132	2 282	2 781	3 420	3 625
India	227	414	378	302	255	262	658	586	436	704	972	1 198	1 146	883	1 108	1 569	2 248	3 116
USA	1 378	1 165	1 052	1 044	1 190	808	1 521	1 243	1 429	1 357	1 245	2 341	2 681	1 508	2 006	3 102	2 337	2 906
Russia	5	22	7	5	6	16	17	43	14	12	21	10	17	200	92	241	215	803
Japan	12	16	18	14	13	13	19	16	14	13	16	20	21	21	26	24	37	31

Table 3: Export value of agricultural products in Rands (millions), 1996-2013

Export destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	12 531	12 989	13 851	15 219	16 409	21 020	28 552	24 901	24 984	28 451	27 664	31 306	46 537	47 326	48 706	53 681	57 884	74 877
EU	4 250	4 792	5 532	6 206	6 417	7 713	10 566	10 448	11 441	11 790	10 511	13 653	17 390	16 193	16 291	16 705	17 299	23 567
Africa	2 487	3 117	3 619	3 815	4 195	5 269	7 966	6 620	5 092	5 624	6 277	6 305	14 136	15 262	13 921	14 448	17 162	21 720
BRIC	574	475	338	320	231	493	656	923	1 006	1 122	1 342	2 139	2 969	3 136	3 861	3 879	4 995	6 451
China	60	61	45	76	78	173	141	344	422	625	701	1 189	1 593	1 693	2 034	2 031	2 914	3 682
Japan	1 115	701	817	838	1 050	1 657	1 249	1 069	1 144	1 576	1 109	1 091	1 435	1 260	1 476	1 336	1 433	3 426
ASEAN	452	260	280	394	337	983	940	679	608	1081	750	1 054	1 457	2 193	2 169	1 842	3 020	3 200
USA	1 317	1298	808	798	1119	1436	2976	1546	1756	2620	1914	1745	1865	1689	2145	2146	2002	2371
Russia	110	60	241	179	48	186	227	411	342	258	483	620	1 003	983	1 226	1 261	1 359	1 884
India	21	50	25	39	37	87	106	113	194	159	62	247	251	352	457	469	554	615
Mercosur	573	619	132	100	130	122	280	89	83	127	148	138	194	176	229	312	248	352
Brazil	382	304	27	26	69	48	182	55	49	81	97	83	122	108	144	119	168	270

Table 4: Export value of agricultural products (%), 1996-2013

Export destination	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	35.4	40.4	37.8	39.3	43.5	41.0	35.8	32.2	30.8
Africa	22.0	25.6	25.3	27.3	20.1	21.3	31.3	27.7	29.3
BRIC	4.1	2.3	1.9	3.0	4.0	5.9	6.5	7.6	8.6
China	0.5	0.4	0.7	0.9	2.0	3.2	3.5	4.0	5.0
Japan	7.1	5.7	7.2	4.3	5.1	3.7	2.9	2.7	3.7
ASEAN	2.8	2.3	3.5	3.0	3.2	3.1	3.9	3.9	4.7
USA	10.2	5.5	6.8	8.5	8.2	6.2	3.8	4.2	3.3
Russia	0.7	1.4	0.6	1.2	1.1	1.9	2.1	2.4	2.4
India	0.3	0.2	0.3	0.4	0.7	0.5	0.6	0.9	0.9
Mercosur	4.7	0.8	0.7	0.7	0.4	0.5	0.4	0.5	0.5
Brazil	2.7	0.2	0.3	0.4	0.2	0.3	0.2	0.3	0.3

3. TRENDS IN MAJOR AGRICULTURAL PRODUCTS TRADED BETWEEN SOUTH AFRICA AND THE REST OF THE WORLD

3.1 Overview

This section examines the trends in the major agricultural products that have been imported and exported by South Africa since 1996. It begins by looking at how the import and export profiles have changed, focusing on the ten products with, first, the highest import value, and, second, the highest export value. This includes both the annual value of each traded product and the proportion of the total market value that this represents. Next, the analysis turns to the countries with which the major products are traded. The five imports and five exports which were worth the highest value in 2013 were broken down in terms of either the ten largest sources of the imported product or the ten largest destinations of the exported product, to analyse trends since 1996.

The five products with the highest import values in 2013 were rice, wheat, poultry meat, ethyl alcohol and soybean oilcake (see *Figure 4*). Rice and wheat were the most valuable imported products throughout the period examined, while the centrality of poultry meat grew and sunflower-seed oil receded. Thailand, India and China accounted for around a third of rice imports each by the end of the period, though China only became such a significant source after 2011. The composition of import sources for wheat transformed dramatically, with the USA falling from a 52.0% to a 3.2% market share, and a marked increase in market share of Ukraine, Russia and Brazil. The USA declined as a source of poultry meat imports, while Brazil soared from an initial market share of 7.1% to over three quarters of total market value towards the middle of the period. Between 2011 and 2013 poultry meat imports from the EU grew to a finishing market share of 45.6%, and it supplanted Brazil (40.9%) as top source.

The five products with the highest export value were: citrus fruit; wine; maize; apples, pears and quinces; and grapes (see *Figure 5*). The export market was characterised by the rise of fruit as the dominant product group – the three mentioned above made up 27.1% of total market value. Products that faded in prominence included titanium oxide and sugar. Notably, sugar was amongst both the top ten imports and the top ten exports in 2013. The EU maintained dominance of the fresh fruit and wine markets throughout, though in terms of fruit the proportion of the market held fell by between fifteen and thirty percentage points in each case. The geographical centre of fresh fruit exports shifted east, towards Russia, China, Malaysia and the Middle East (which accounted for a fifth of citrus fruit export value by the end of the period). African countries grew in significance as a destination for apples, pears, quinces and grapes, with the proportion held rising from well below 10% to around 15%. Maize was also a major

export throughout, though in terms of sources was it extremely volatile, with dominance shifting between Japan, Mexico, Zimbabwe and South Korea.

Figure 4: Key trends in the product composition of South Africa's agricultural import market

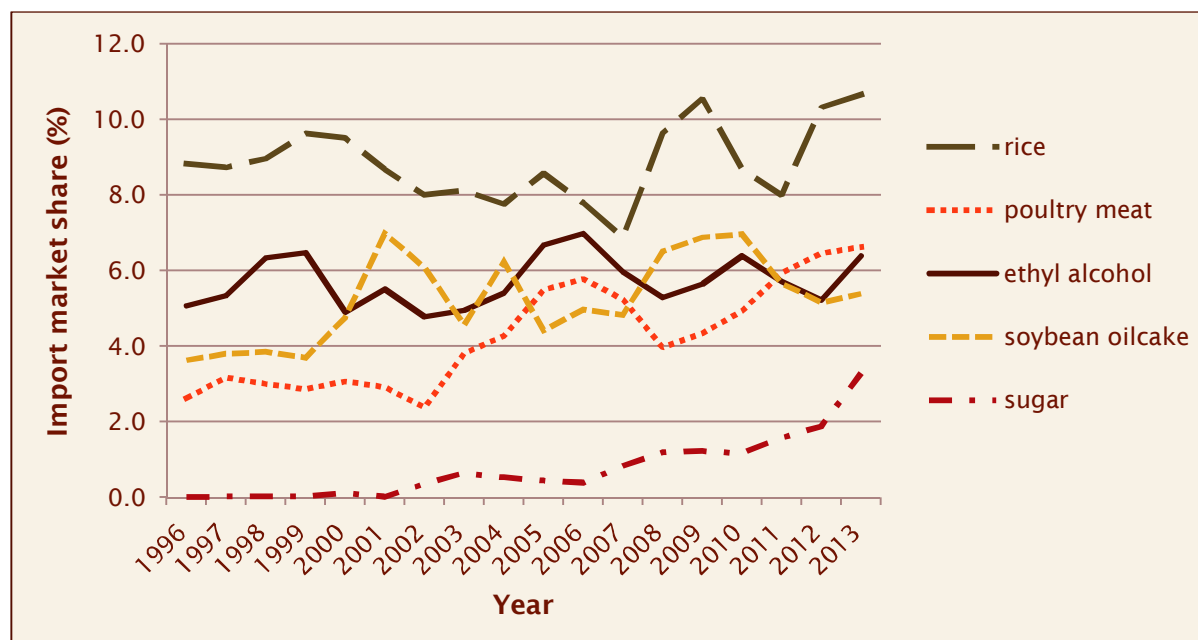
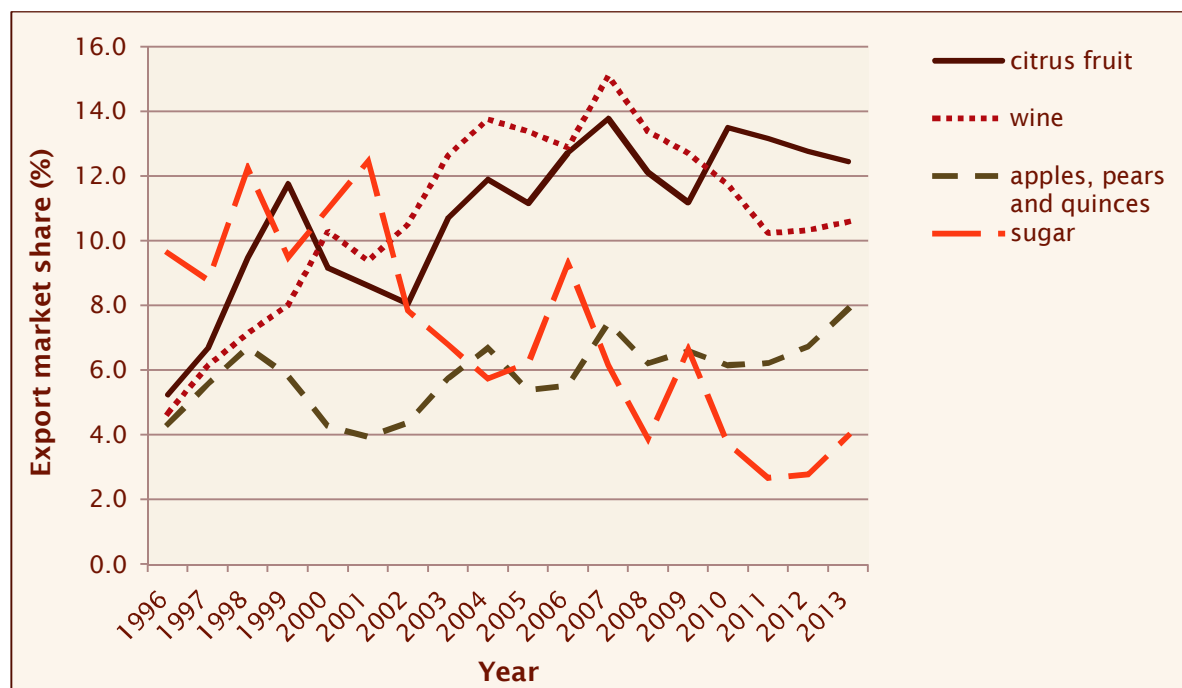


Figure 5: Key trends in the product composition of South Africa's agricultural export market



The total value of the export market was more heavily concentrated into its leading products than the import market (the top ten exports made up 62.5% of total market value compared to the 53.6% share held by the top ten imports).

When analysing the partners with whom trade of the major products occurs, the EU is here counted as a single partner (and its member states are omitted from the study). However, unlike in the previous section, African nations are considered individually, as are countries from the BRIC, ASEAN and Mercosur groups. This is because, when working with individual products rather than broader trade patterns, these groupings hold less relevance, and it makes sense to focus more precisely on individual countries.

3.2 Changes in the value and market composition of the top ten imported products

Rice remained the product with the highest import value for the entire period (apart from 2011, when it was second to wheat) (see *Table 6*). Wheat, ethyl alcohol and soybean oilcake also held strong positions throughout. In 1996, the five products with the highest import values were rice, wheat, ethyl alcohol, sunflower-seed oil and soybean oilcake. In 2013, the top five were rice, wheat, poultry meat, ethyl alcohol and soybean oilcake. Four of the top five from 1996 were also in the top five in 2013, and the remaining product (sunflower-seed oil) was the tenth most valuable. However, the other five products in the top ten of 2013 did not feature in 1996. The market share of the top five products rose from 30.1% to 46.5%, and of the top ten from 35.9% to 53.6% (see *Table 5*).

Rice rose in value from R698 million to R6.3 billion. Most of this growth (R4.7 billion) occurred during the second half of the period, and the import value grew by R3.2 billion between 2010 and 2013. Growth in the value of wheat was strong but unsteady. It grew from R668 million in 1996 to R1.0 billion in 2006, then shot up to a value of R4.0 billion in 2013. Poultry meat, the only product to appear in the top five in 2013 that was not there in 1996, rose fairly steadily from R207 million (with a market share of 2.6% in 1996⁴) to R3.8 billion (6.6% in 2013⁵), although there was a slump in value between 2008 and 2009. Cane or beet sugar experienced the strongest rates of growth of all imports. Its value rose from R1 million in 1996, to just R85 million in 2006, then soared to a figure of R1.9 billion in 2013. Soybean oil saw a similarly large rate of growth of value, starting the period at R54 million and finishing at R2.1 billion. The value in sunflower-seed oil fluctuated dramatically, but underwent broad decline between 1997 (R505 million) and its low point of R162 million in 2005. After this, the overall pattern reversed, and value grew to a peak of R2.0 billion in 2012, finishing on R1.5 billion in 2013.

Table 5: Changes in market composition of top ten imported products (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1006	rice	8.8	9.3	9.1	8.1	8.2	7.3	10.1	8.3	10.5
1001	wheat	6.0	4.3	4.2	5.9	7.1	5.5	7.9	7.8	7.0
0207	poultry meat	2.9	2.9	3.0	3.1	4.9	5.5	4.1	5.5	6.5
2208	ethyl alcohol	5.2	6.4	5.2	4.9	6.0	6.4	5.5	6.0	5.8
2304	soybean oilcake	3.7	3.8	5.9	5.4	5.3	4.9	6.7	6.2	5.3
1511	palm oil	2.9	4.1	3.6	5.0	4.3	4.2	5.8	6.3	5.6
1507	soybean oil	0.5	1.0	1.3	3.1	3.9	4.5	4.3	5.8	3.8
1701	cane or beet sugar	0.0	0.0	0.1	0.5	0.5	0.7	1.2	1.4	2.6
2106	food preparations NESOI*	2.0	3.0	3.8	3.1	3.2	3.5	3.0	2.7	2.9
1512	sunflower-seed oil	4.9	5.1	3.4	1.4	1.7	2.7	1.6	2.1	3.1

⁴ Note that this is the figure for 1996, not 1996-97, so it differs from the figure on the table.

⁵ Note that this is the figure for 2013, not 2012-13, so it differs from the figure on the table.

**NESOI = Not Elsewhere Specified or Included*

Table 6: Changes in value of top ten imported products (R million), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	7 903	8 983	9 286	8 970	9 857	10 879	15 533	14 454	17 020	17 084	21 504	30 591	39 892	35 836	35 584	46 080	54 522	58 775
1006	rice	698	784	833	863	938	944	1 244	1 174	1 322	1 465	1 678	2 106	3 850	3 783	3 092	3 687	5 624	6 271
1001	wheat	668	347	433	349	595	280	927	846	1 272	1 152	1 014	1 830	3 613	2 337	2 003	4 346	3 952	4 023
0207	poultry meat	207	285	278	257	303	317	368	551	728	939	1 244	1 603	1 580	1 558	1 754	2 734	3 521	3 893
2208	ethyl alcohol	401	479	589	581	483	599	742	716	919	1 141	1 501	1 823	2 114	2 026	2 276	2 634	2 851	3 760
2304	soybean oilcake	287	342	357	332	470	759	946	659	1 061	756	1 069	1 477	2 596	2 466	2 477	2 606	2 808	3 171
1511	palm oil	232	252	374	365	323	427	765	734	789	665	793	1 376	2 436	1 964	2 188	2 992	3 343	2 985
1507	soybean oil	54	36	106	72	43	222	435	491	645	702	879	1 485	2 361	927	2 015	2 712	2 177	2 076
1701	cane or beet sugar	1	2	2	2	13	2	57	94	89	78	85	258	474	438	417	730	1 025	1 937
2106	food preparations NESOI	152	184	246	294	343	450	476	442	483	614	794	1 010	1 253	1 035	1 013	1 212	1 405	1 845
1512	sunflower-seed oil	327	505	493	440	313	398	215	204	403	162	488	915	465	775	787	905	2 045	1 515

Table 7: Changes in value of top ten exported products (R million), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	12 531	12 989	13 851	15 219	16 409	21 020	28 552	24 901	24 984	28 451	27 664	31 306	46 537	47 326	48 706	53 681	57 884	74 877
0805	citrus fruit	659	869	1315	1 791	1 505	1 812	2 302	2 668	2 973	3 178	3 525	4 317	5 643	5 294	6 576	7 067	7 389	9 327
2204	wine	587	800	991	1 221	1 689	1 975	3 002	3 151	3 437	3 808	3 565	4 733	6 230	6 017	5 722	5 492	5 984	7 936
1005	maize	1 528	1 140	782	498	499	670	1 378	1 042	726	1 666	972	227	4 413	3 819	2 232	6 038	3 259	6 050
0808	apples, pears & quinces	544	726	931	888	703	829	1252	1 438	1 673	1 532	1 530	2 340	2 894	3 121	3 000	3 337	3 905	5 925
0806	grapes	566	735	901	1 264	1 253	1 336	1 604	1 639	2 034	2 100	1 981	2 594	3 065	3 407	3 654	3 398	4 079	4 981
1701	cane or beet sugar	1 208	1 142	1 694	1 444	1 802	2 623	2 242	1 693	1 438	1 770	2 575	1 929	1 812	3 153	1 813	1 442	1 605	2 982
5101	wool	326	330	355	383	353	419	767	644	582	581	757	1 133	1 246	1 301	1 331	2 167	2 399	2 936
2905	acyclic alcohols	102	130	139	197	249	385	582	799	1 153	1 111	1 119	1 524	2 129	1 283	1 995	1 701	2 054	2 391
2009	fruit juice	309	311	354	478	653	657	969	799	617	823	973	947	1 413	1 413	1 517	1 670	1 871	2 278
0802	nuts NESOI	33	40	45	82	100	153	194	210	191	400	300	289	379	452	732	1 013	1 336	1 811

3.3 Changes in the value and market composition of the top ten exported products

In 1996, the five most valuable products were: maize; titanium oxides; cane or beet sugar; fruit and nuts; and citrus fruit. The combined market share of these five products was 44.4%, and of the top ten was 64.5% (see *Table 8*). In 2013, the top five products were: citrus fruit; wine; maize; apples, pears and quinces; and grapes (see *Table 7*). The combined market share of these five was 45.7%, and of the top ten was 62.3% — in both cases, the export market was more heavily concentrated than the import market.

The period was characterised by the rise of fresh fruit as the dominant exported product group. The share of fresh fruits that featured in the top ten products (citrus fruit; apples, pears and quinces; grapes) of both 1996 and 2013 rose from 14.1% to 27.1%. These figures rise by 2.5 and 3.0 percentage points, respectively if fruit juice is included, and by 4.7 and 10.6 percentage points, respectively if wine is included. Citrus fruit rose from R659 million to R9.3 billion, going from fifth to first most valuable export. Grapes and apples, pears and quinces started with similar values (R566 million and R544m, respectively), but grapes grew at a markedly greater rate, being higher in value each year up to 2012, except for during 1998. Both products rose dramatically in value into 2013, but the rise in apples, pears and quinces was substantially greater (from R3.9 billion to R5.9 billion, compared to the growth in grape exports from R.4.0 billion to R5.0 billion).

From an initial market share of 11.6%, titanium oxide exports had virtually disappeared by 2013. Titanium oxide declined in value from R1.5 billion to R38 million (a market share well below 0.1%). Wine rose steadily from R587 million to R8.0 billion, despite a slump between 2010 and 2011, and held a central position in South Africa's export profile from 2000 onwards. Maize values were extremely volatile, ranging from R227 million in 2007 to a peak of R6.0 billion in 2013. Cane or beet sugar was the leading export in 1998, 2000 and 2001, but after this receded somewhat, particularly towards the end of the period, finishing as the sixth largest export at R3.0 billion.

In the next section, the trends in the sources of the top five imported and the top five exported products between 1996 and 2013 will be examined.

Table 8: Changes in market composition of top ten exported products (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
0805	citrus fruit	6.0	10.7	8.9	9.3	11.5	13.3	11.7	13.3	12.6
2204	wine	5.4	7.6	9.8	11.5	13.6	14.1	13.0	11.0	10.5
1005	maize	10.5	4.4	3.1	4.5	4.5	2.0	8.8	8.1	7.0
0808	apples, pears and quinces	5.0	6.3	4.1	5.0	6.0	6.6	6.4	6.2	7.4
0806	grapes	5.1	7.4	6.9	6.1	7.7	7.8	6.9	6.9	6.8
1701	cane or beet sugar	9.2	10.8	11.8	7.4	6.0	7.6	5.3	3.2	3.5
5101	wool	2.6	2.5	2.1	2.6	2.2	3.2	2.7	3.4	4.0
2905	acyclic alcohols	0.9	1.2	1.7	2.6	4.2	4.5	3.6	3.6	3.3
2009	fruit juice	2.4	2.9	3.5	3.3	2.7	3.3	3.0	3.1	3.1
0802	nuts NESOI	0.3	0.4	0.7	0.8	1.1	1.0	0.9	1.7	2.4

3.4 Trends in import values and source compositions of the five products with the highest import value in 2013

Import value and source composition of rice

The rice import market shifted away from the USA and towards China, while Thailand and India continued to hold central positions, particularly for Thailand between 2004 and 2011. In 1996, the five countries from which import value was highest were the USA, Thailand, India, Vietnam and Sudan. In 2013, the top five were Thailand, India, China, Vietnam and Uruguay. In both years (and for most of the period), the market was heavily concentrated into the top three sources – in 1996, the top three made up 97.4% of the market; in 2013, the top three made up 94.0%.

The share of the market held by Thailand in 1996 was 37.4%. Value underwent strong growth from R261 million in 1996 to a peak of R3.1 billion in 2008 (when value surged from R1.4 billion during the previous year), before dropping somewhat to a final value of R2.2 billion. Market share rose to a peak of 76.5% during 2008–9, but declined sharply during 2012–13 to 34.7%. This was partly due to the decline in import value, and also to the rise of both India and China. India constituted between roughly a quarter and a third of the market for most of the period, though between 2008 and 2010 the value of the market dipped dramatically, causing market share to fall to 7.6% in 2008–9 and 9.4% in 2010–11. In 2011, the market recovered, and by the end of the period market share was 27.6%. Import value from China remained relatively very low until 2008, when it rose from R19 million to R126m. After dipping somewhat between 2010 and 2011, value underwent radical growth from R22 million to R1.8 billion in 2012, finishing at R1.6 billion. Market share rose from 2.3% in 2010–11 to 29.1% in 2012–13.

Import value from the USA steadily declined between 1996 and 2004 from R265 million to R1 million, after which it grew at a slow rate to a final value of R25m. Market share fell over the period from 32.6% in 1996–97 to 0.4% in 2012–13.

Table 9: Changes in market composition of rice imports (%), 1996-2013

Import source	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
Thailand	37.8	46.8	47.1	46.8	72.4	62.4	76.5	70.9	34.7
India	26.2	24.4	13.9	35.7	24.7	34.2	7.6	9.4	27.6
China	0.0	0.1	0.2	0.3	0.1	1.0	5.5	2.3	29.1
Vietnam	1.5	1.9	1.1	1.0	0.2	0.0	1.5	1.6	2.3
Uruguay	0.1	0.8	7.4	1.7	0.1	0.2	0.4	0.4	1.1
Pakistan	0.2	0.3	0.7	1.0	0.7	0.8	2.3	9.3	1.2
Brazil	0.0	0.0	0.1	0.0	0.1	0.0	4.9	4.9	2.6
Australia	0.5	0.9	0.9	0.7	0.7	0.9	0.3	0.1	0.3
USA	32.6	21.1	15.4	12.2	0.1	0.1	0.2	0.3	0.4
UAE*	0.0	0.0	0.1	0.0	0.1	0.0	0.2	0.2	0.1

* UAE = United Arab Emirates

Table 10: Changes in value of rice imports (R million), 1996-2013

Import source	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	698	784	833	863	938	944	1 244	1 174	1 322	1 465	1 678	2 106	3 850	3 783	3 092	3 687	5 624	6 271
Thailand	261	299	386	407	337	549	529	601	1 069	949	983	1 378	3 103	2 734	2 331	2 477	1 930	2 194
India	153	234	213	200	138	124	466	398	218	469	636	659	398	184	150	491	1 217	2 061
China	0	0	0	1	2	1	2	5	2	1	18	19	126	295	132	22	1 825	1 639
Vietnam	6	16	16	17	12	8	0	25	0	7	0	1	88	24	73	33	140	138
Uruguay	1	1	1	11	58	81	35	6	2	1	2	4	8	23	9	18	56	71
Pakistan	1	2	3	3	8	5	13	11	9	10	12	17	32	144	349	279	96	49
Brazil	0	0	0	0	0	1	0	0	0	1	0	1	57	321	17	318	274	37
Australia	3	4	6	9	8	9	11	7	10	10	17	18	17	4	1	6	13	26
USA	265	219	189	170	164	126	180	115	1	2	3	2	8	8	11	12	17	25
UAE	0	0	0	0	1	0	1	0	2	0	1	1	1	13	5	9	5	8

Table 11: Changes in value of wheat imports (R million), 1996-2013

Import source	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	668	347	433	349	595	280	927	846	1 272	1 152	1 014	1 830	3 613	2 337	2 003	4 346	3 952	4 023
Ukraine	0	0	0	0	0	0	25	68	0	53	26	0	0	68	0	0	524	1 235
Russia	0	0	0	0	0	0	0	33	0	0	0	0	0	0	0	233	200	693
Brazil	0	0	0	0	0	0	0	0	0	0	0	0	0	75	157	80	725	585
Australia	251	56	101	175	170	32	191	45	385	167	19	0	0	210	107	600	444	508
EU	3	0	33	0	0	5	281	301	50	164	373	78	584	1 382	888	544	222	303
Uruguay	0	0	0	0	0	0	0	0	0	0	0	0	0	0	54	0	96	293
USA	374	153	73	67	105	29	78	265	410	338	29	811	742	86	530	1 185	87	171
Canada	36	102	207	83	179	0	0	0	2	10	128	465	338	89	206	226	72	158
Argentina	0	28	18	18	130	214	171	57	424	421	418	476	1 948	426	63	1 478	1 583	77
India	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Import value and source composition of wheat

The composition of import sources for wheat transformed greatly over the period. The market for wheat imports remained heavily concentrated throughout, although concentration diminished somewhat over the period. The top two import sources in 1996, the USA and Australia, made up 93.6% of the market (see *Table 12*). Together with the next three highest, Canada, Zimbabwe and the EU, they effectively accounted for the entire market. In 2013, the concentration of the market into the top five import sources (Ukraine, Russia, Brazil, Australia and the EU) fell to 82.6%. The top ten made up 100% of total import value.

The three most valuable sources in 2013, Ukraine, Russia and Brazil, each grew from a market share of below 0.1% in 1996–97 to shares of 22.0%, 11.2% and 16.4%, respectively in 2012–13. Imports from Ukraine were worth below R1 million during eleven of the sixteen years leading up to 2011 (see *Table 11*). For Russia this was figure was fourteen years, and for Brazil thirteen. The value of imports from all three rose dramatically towards the very end of the period.

Import values from the USA, which heavily dominated the market at the beginning of the period, fell from 52.0% in 1996–7 to 3.2% in 2012–3. Value and market share fluctuated greatly, but after 1997 the country did not regain anything near the level of dominance it had held at the start of the period. Imports from the EU and Argentina emerged from relatively low levels of 0.3% and 2.8%, respectively, to a peak for both in 2008–9 with shares of 33.0% and 39.9%, respectively. By 2012–13, the share of the market held by the EU had fallen to 6.6% and by Argentina to 20.8%. Australia held a strong position throughout, except for a crash between 2006 and 2008 when value fell to below R1 million. It finished with a market share significantly lower than its 1996–7 level of 30.3%, at 11.9%.

Table 12: Changes in market composition of wheat imports (%), 1996–2013

Import source	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
Ukraine	0.0	0.0	0.0	5.2	2.2	0.9	1.1	0.0	22.0
Russia	0.0	0.0	0.0	1.9	0.0	0.0	0.0	3.7	11.2
Brazil	0.0	0.0	0.0	0.0	0.0	0.0	1.3	3.7	16.4
Australia	30.3	35.2	23.2	13.3	22.8	0.7	3.5	11.1	11.9
EU	0.3	4.2	0.6	32.8	8.8	15.8	33.0	22.5	6.6
Uruguay	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	4.9
USA	52.0	18.0	15.3	19.4	30.8	29.5	13.9	27.0	3.2
Canada	13.5	37.0	20.5	0.0	0.5	20.9	7.2	6.8	2.9
Argentina	2.8	4.6	39.3	12.9	34.9	31.4	39.9	24.3	20.8
India	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Import value and source composition of poultry meat

The period saw a shift away from the North American continent, towards Europe and South America. In 1996, the top five sources were the USA, the EU, China, Canada and Australia (see *Table 13*). In 2013, the top five were the EU, Brazil, Argentina, the USA and Canada. In 1996, the top five sources made up 90.1% of the market (see *Table 15*). In 2013, the top two sources alone accounted for 89.0% of the market, and the top five for 99.1%.

The value of poultry meat imports from the EU remained between R20 million and R100 million between 1996 and 2010, leading to a steady decline in market share as total value of poultry meat imports rose. In 2011, value soared from R83 million to R760 million, and by 2013, value had risen to R1.9 billion. The market share held by the EU rose from 2.1% in 2008–9 to 45.6% in 2012–13. The value of imports from Brazil rose dramatically between 2000 (R61 million) and 2008 (R1.2 billion). During this rise, Brazil accounted for a huge majority of the market, peaking in 2004–5 at 76.5%. After this, value dipped slightly before rising to a final level of R1.5 billion.

Table 13: Changes in value of poultry meat imports (R million), 1996-2013

Import source	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	207	285	278	257	303	317	368	551	728	939	1 244	1 603	1 580	1 558	1 754	2 734	3 521	3 893
EU	41	58	58	55	45	37	21	36	49	31	39	32	37	29	83	760	1 456	1 925
Brazil	7	28	17	27	61	126	190	270	565	709	930	1 230	1 191	1 131	1 306	1 471	1 493	1 540
Argentina	0	0	0	1	2	3	19	15	30	54	68	98	153	179	145	167	176	179
USA	73	121	112	73	61	10	16	29	4	15	32	44	50	48	35	96	134	126
Canada	31	16	17	25	37	27	53	84	24	85	129	126	61	91	135	153	68	86
Thailand	4	1	1	1	0	0	18	1	1	0	0	0	0	0	2	27	121	25
UAE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	4
Chile	0	0	0	0	0	0	0	0	0	0	0	0	0	4	3	5	1	3
Israel	7	5	5	5	9	11	8	5	10	8	2	9	6	6	5	3	4	3
Australia	12	9	14	8	15	32	28	26	25	34	39	63	82	69	38	50	66	1

Table 14: Changes in value of ethyl alcohol imports (R million), 1996-2013

Import source	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	401	479	589	581	483	599	742	716	919	1 141	1 501	1 823	2 114	2 026	2 276	2 634	2 851	3 760
EU	349	419	515	502	387	479	573	550	683	808	1 146	1 473	1 754	1 700	1 968	2 225	2 430	3 346
USA	11	14	13	23	21	39	43	45	116	179	202	220	215	200	157	221	218	222
Mexico	7	9	9	6	10	10	20	16	20	20	32	31	40	48	66	61	60	56
Australia	0	0	0	0	0	0	0	0	0	0	9	13	17	7	22	46	47	47
Brazil	0	0	0	0	0	0	0	0	0	0	0	1	0	2	10	20	31	35
Canada	10	13	14	18	21	23	26	17	20	27	31	41	51	41	36	44	44	30
Trinidad & Tobago	0	1	1	0	2	1	2	2	2	2	2	4	1	4	3	4	4	6
UAE	0	0	0	0	0	0	1	1	0	0	0	0	0	0	3	2	0	5
Cuba	0	0	0	0	0	0	0	0	0	1	1	2	1	1	1	2	2	4
Jamaica	20	21	31	20	29	34	59	76	59	81	62	0	1	1	1	2	3	2

Market share receded to 40.9% in 2012–13. The USA was the top import source at the start of the period, making up 39.4% of total import value during 1996–7. Import value underwent a strong decline from R121 million in 1997 to R4 million in 2004, after which slow positive growth began, up to a final level of R126 million (with a market share of 3.5% in 2012–13).

Table 15: Changes in market composition of poultry meat imports (%), 1996-2013

Import source	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	20.1	21.2	13.2	6.2	4.8	2.5	2.1	18.8	45.6
Brazil	7.1	8.1	30.1	50.0	76.5	75.9	74.0	61.9	40.9
Argentina	0.0	0.1	0.8	3.7	5.0	5.8	10.6	6.9	4.8
USA	39.4	34.5	11.6	4.8	1.2	2.7	3.1	2.9	3.5
Canada	9.4	7.8	10.3	14.9	6.5	9.0	4.8	6.4	2.1
Thailand	1.0	0.4	0.1	2.1	0.0	0.0	0.0	0.7	2.0
UAE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Chile	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.1
Israel	2.5	1.9	3.2	1.4	1.0	0.4	0.4	0.2	0.1
Australia	4.2	4.1	7.7	5.9	3.5	3.6	4.8	2.0	0.9

Import value and source composition of ethyl alcohol

The EU maintained a strong dominant position throughout the period, though it underwent a dip in its market share towards the middle. The USA and Jamaica rose markedly during this dip, and subsequently receded. In 1996, the top five sources were the EU, Jamaica, the USA, Canada and Mexico (see *Table 14*). In 2013, the top five were the EU, the USA, Mexico, Australia and Brazil.

The EU began the period with a market share of 87.3% (see *Table 16*). For the first half of the period, this share declined to a low of 72.4% in 2004–5. This was partly due to a sharp fall in import value between 1999 and 2000 from R502 million to R387m, and partly due to the rise of other import sources which meant that the growth rate experienced in import values from the USA could not keep up with the growth in overall import value. However, during the second half of the period there was resurgence in the market share of the EU, which steadily grew to 87.4% by 2012–13.

The market shares of both the USA and Jamaica peaked towards the middle of the period, and then declined through to 2013. Growth in the value of imports from the USA, which began at R11m, remained high until 2007 (R220m), after which growth was stagnant. The market share peaked in 2004–5 at 14.3%, and finished at 6.7% (R222m). Imports from Jamaica were worth R20 million in 1996, growing to R81 million in 2005, but crashed in 2007 to below R1m, and thereafter did not exceed R3m. Market share peaked in 2002–3 at 9.3%, but finished on 0.1%.

Table 16: Changes in market composition of ethyl alcohol imports (%), 1996-2013

Import source	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	87.3	86.9	80.0	77.1	72.4	78.8	83.4	85.4	87.4
USA	2.8	3.1	5.6	6.0	14.3	12.7	10.0	7.7	6.7
Mexico	1.8	1.3	1.8	2.4	1.9	1.9	2.1	2.6	1.8
Australia	0.0	0.0	0.0	0.0	0.0	0.6	0.6	1.4	1.4
Brazil	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.6	1.0
Canada	2.6	2.7	4.0	3.0	2.3	2.2	2.2	1.6	1.1
Trinidad & Tobago	0.1	0.1	0.3	0.2	0.2	0.2	0.1	0.1	0.1
UAE	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.1
Cuba	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.1
Jamaica	4.7	4.3	5.8	9.3	6.8	1.9	0.0	0.1	0.1

Import value and source composition of soybean oilcake

Virtually the entire soybean oilcake import market is constituted by Argentina alone. In 1996–7, Argentina held a 61.3% market share; Brazil a 15.9% share, the USA a 12.2% share and India an 8.3% share (see *Table 17*). In 2013, Argentina held a 100% share, with a value of R3.2 billion. The next highest value, from India, was R1m. After strong growth between 1997 and 2002, Argentina had secured its position as the overriding source of imports of soybean oilcake. Brazil, India and the USA had almost completely disappeared by 1999, and only made small, isolated reappearances of below R100 million for the rest of the period (see *Table 19*).

Table 17: Changes in market composition of soybean oilcake imports (%), 1996-2013

Import source	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
Argentina	61.3	80.0	95.6	96.5	97.9	99.9	97.6	99.9	100.0
India	8.3	4.2	0.0	0.0	0.0	0.0	1.5	0.0	0.0
USA	12.2	8.8	1.1	0.0	2.1	0.0	0.0	0.0	0.0
Kenya	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
China	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
EU	0.1	0.1	0.8	1.1	0.0	0.0	0.1	0.0	0.0
Japan	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Brazil	15.9	0.0	0.0	1.9	0.0	0.0	0.3	0.0	0.0
South Korea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Malawi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

3.5 Trends in export values and destination compositions of the five products with the highest export value in 2013

Export value and destination composition of citrus fruit

The five largest export destinations in 1996 were the EU, Saudi Arabia, Hong Kong, UAE, and Japan (see *Table 20*). Exports to these five destinations constituted 87.2% of the market, and exports to the top ten destinations made up 97.2% (see *Table 18*). In 2013, the top five destinations were the EU, Russia, the UAE, Saudi Arabia and Canada. The market concentration into the top five had fallen to 70.8%, and into the top ten to 86.1%.

The EU was the major destination for exports of citrus fruit throughout, though the period saw its market share decline markedly from 64.7% to 40.3%. Russia grew considerably as an export destination, from a market share of 3.2% in 1996–7 to a market share of 10.3% during 2012–13. The Middle East was a significant regional destination throughout, making up around a fifth of the market by the end of the period. The UAE overtook Saudi Arabia, Canada, Japan and Hong Kong to become the third largest destination, while Kuwait saw its market share rise tenfold to 3.1%. Canada maintained a market share roughly between 3% and 5% throughout. The position of both Japan and Hong Kong initially grew (to peaks of 10.6% and 6.5%, respectively), before declining to 3.4% and 3.8%, respectively.

Table 18: Changes in market composition of citrus fruit exports (%), 1996-2013

Export destination	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	64.7	57.2	55.8	45.5	47.4	41.8	45.0	39.2	40.3
Russia	3.2	1.6	4.3	7.7	6.0	8.4	9.4	12.0	10.3
UAE	2.8	4.6	5.1	5.5	4.7	7.3	7.9	8.1	8.5
Saudi Arabia	11.6	12.8	10.0	8.9	6.2	6.3	5.5	8.1	6.7
Canada	3.4	4.8	3.6	3.5	3.8	3.2	3.3	3.2	4.1
Kuwait	0.3	0.3	0.1	0.1	0.6	0.9	1.7	2.5	3.1
Japan	5.3	5.6	5.7	8.2	10.6	7.3	4.8	3.8	3.4

USA	0.0	0.5	2.9	4.7	6.0	6.2	4.6	4.2	3.5
Hong Kong	3.7	6.5	5.7	4.9	4.1	5.3	4.7	5.2	3.8
China	0.0	0.1	0.0	0.3	0.4	0.3	0.3	0.8	1.9

Table 19: Changes in value of soybean oilcake imports (R million), 1996-2013

Import source	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	287	342	357	332	470	759	946	659	1061	756	1 069	1 477	2 596	2 466	2 477	2 606	2 808	3 171
Argentina	195	190	255	296	451	724	890	659	1 023	756	1 069	1 475	2 511	2 432	2 473	2 606	2 808	3 171
India	4	48	28	1	0	0	0	0	0	0	0	0	74	0	0	1	0	1
USA	9	68	59	2	2	11	0	0	37	0	0	0	0	0	0	0	0	0
Kenya	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
China	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
EU	0	0	0	1	3	7	18	0	0	0	0	0	2	4	0	0	0	0
Japan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Brazil	66	34	0	0	0	0	31	0	0	0	0	0	9	5	0	0	0	0
South Korea	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Malawi	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Table 20: Changes in value of citrus fruit exports (R million), 1996-2013

Export destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	659	869	1 315	1 791	1 505	1 812	2 302	2 668	2 973	3 178	3 525	4 317	5 643	5 294	6 576	7 067	7 389	9 327
EU	417	570	829	946	867	983	1 101	1 163	1 409	1 505	1 285	1 992	2 696	2 224	2 628	2 726	2 932	3 805
Russia	22	26	24	24	26	117	157	225	211	158	274	387	509	521	799	836	748	975
UAE	31	12	57	85	73	97	113	162	138	154	272	303	412	449	594	512	619	809
Saudi Arabia	71	106	150	249	156	176	199	243	205	176	265	229	265	336	467	634	508	620
Canada	23	29	58	92	74	47	88	86	96	135	127	121	175	191	192	246	282	397
Kuwait	3	3	3	7	3	2	4	3	12	23	32	36	75	113	178	170	187	323
Japan	23	58	47	128	84	106	202	207	276	373	263	306	306	219	235	285	266	304
USA	0	1	2	13	34	64	80	156	171	196	292	195	264	244	309	259	293	293
Hong Kong	32	25	63	139	86	104	132	112	120	132	214	203	234	282	309	395	346	281
China	0	0	1	3	1	0	6	8	4	22	8	12	14	20	33	73	101	221

Export value and destination composition of wine

The three major export destinations for wine – the EU, the USA and Canada – dominated the market throughout the period; and amongst these the EU dominated by a very large margin (see *Table 23*). In 1996, the top five destinations also included Mozambique and Paraguay; in 2013, Russia and China. The EU held a market share of 70.1% at the start of the period, rising to 82.0% in 2002–3, and dropping to 62.9% by the end (see *Table 21*). The USA began below Canada, with 3.4% compared to Canada's 4.5%. However, from 1998 onwards (except for 2010-2011) the value of wine exports to the USA was higher. At the end of the period, the USA held a 6.8% market share, and Canada a 5.8% share. Mozambique and Paraguay fell out of the top ten, accounting for less than a 1% share of the market. Russia and China emerged in the second half of the period as significant markets, growing to hold shares of 3.0% and 3.2%, respectively.

Table 21: Changes in market composition of wine exports (%), 1996-2013

Export destination	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	70.1	77.2	80.3	82.0	79.1	75.0	73.1	68.7	62.9
USA	3.4	3.7	4.4	4.7	5.7	6.4	5.1	5.2	6.8
Canada	4.5	3.5	3.5	3.0	3.9	5.2	4.8	5.4	5.8
Russia	0.1	0.1	0.2	0.2	0.4	0.9	1.4	1.1	3.0
China	0.1	0.1	0.0	0.0	0.1	0.3	0.9	2.0	3.2
Angola	0.4	0.4	0.3	0.2	0.4	0.9	2.2	2.3	2.2
Japan	2.3	3.2	1.7	1.2	0.9	1.0	1.1	1.3	1.8
UAE	0.2	0.2	0.3	0.2	0.3	0.5	0.7	1.0	1.3
Nigeria	0.0	0.1	0.1	0.1	0.1	0.7	0.9	1.4	1.3
Kenya	1.0	0.7	0.6	0.4	0.6	0.8	0.6	1.0	1.2

Export value and destination composition of maize

The maize export market was significantly more volatile than the other export markets examined here. The position of central export destination (by strong margins), was held at different points by Japan, Mexico and Zimbabwe. At times, South Korea, Iran and Zambia also accounted for major shares of the market.

In 1996, the top five destinations were Japan, Iran, Venezuela, Mexico and Malaysia (see *Table 22*). The top five destinations constituted 74.4% of the market and the top ten 92.4%. In 2013, the top five destinations were Japan, Mexico, Taiwan, Zimbabwe and Mozambique. The top five destinations made up 78.8% of the market and the top ten 91.9%. In 2004 and 2012 and between 2007 and 2009, less than R1 million worth of maize was exported to Japan (see *Table 24*). For Mexico, this was true in 2008 and 2010 and between 1997 and 2006. Exports to Taiwan did not reach R1 million until 2011. In 2013, however, these three destinations represented the highest values. Particularly in the middle of the period, Zimbabwe constituted about half of the market, but its market share fell as low as 0.8%, ending on 8.9%.

Table 22: Changes in market composition of maize exports (%), 1996-2013

Export destination	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
Japan	24.2	7.8	46.1	4.1	4.1	0.0	0.0	3.4	20.7
Mexico	4.8	0.0	0.0	0.0	0.0	3.7	0.0	34.0	38.0
Taiwan	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.0	9.0
Zimbabwe	1.6	47.8	0.8	56.4	52.9	45.6	38.2	3.7	8.9
Mozambique	0.7	3.3	7.2	5.4	8.1	8.8	5.4	3.5	5.7
EU	2.2	0.8	1.1	1.1	0.6	8.6	0.4	6.8	3.3
South Korea	2.1	0.2	2.6	0.3	0.0	0.0	0.0	25.1	2.8
Philippines	0.0	0.1	0.0	0.0	0.9	4.8	2.0	2.8	3.3
UAE	0.1	0.3	1.1	0.1	0.0	0.1	0.0	0.0	0.6
Zambia	0.4	11.0	2.9	15.5	3.6	12.4	2.7	0.3	0.7

Table 23: Changes in value of wine exports (R million), 1996-2013

Export destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	587	800	991	1 221	1 689	1 975	3 002	3 151	3 437	3 808	3 565	4 733	6 230	6 017	5 722	5 492	5 984	7 936
EU	419	553	743	966	1 363	1 579	2 427	2 620	2 790	2 944	2 687	3 536	4 503	4 450	4 003	3 697	3 712	5 046
USA	21	25	35	48	68	93	151	140	181	232	258	272	322	305	298	286	389	562
Canada	29	33	38	39	57	71	98	88	114	171	195	236	294	291	312	294	372	437
Russia	0	1	1	1	4	2	6	7	12	16	30	44	114	55	56	71	164	254
China	0	1	0	1	0	1	1	1	2	4	9	19	49	55	79	147	236	214
Angola	2	4	5	4	4	5	5	7	10	20	21	52	163	102	123	135	159	151
Japan	9	23	41	30	32	29	43	33	29	34	29	55	50	82	81	61	115	132
UAE	1	1	2	2	5	4	6	6	8	14	18	24	44	44	55	58	72	111
Nigeria	0	0	1	1	2	2	2	4	4	5	12	47	52	56	67	86	80	107
Kenya	6	8	7	9	9	13	13	12	18	24	33	34	37	34	54	62	68	95

Table 24: Changes in value of maize exports (R million), 1996-2013

Export destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	1 528	1 140	782	498	499	670	1 378	1 042	726	1 666	972	227	4 413	3 819	2 232	6 038	3 259	6 050
Japan	474	171	99	1	142	398	69	30	0	98	1	0	0	0	166	116	0	1 927
Mexico	127	0	0	0	0	0	0	0	0	0	0	43	0	1	0	2816	2607	929
Taiwan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	411	1	840
Zimbabwe	39	4	377	235	6	3	761	604	335	929	480	66	2 531	615	227	75	63	766
Mozambique	7	13	23	19	39	46	40	90	47	147	80	25	277	169	112	177	229	305
EU	42	16	7	4	4	9	12	15	11	4	101	2	5	24	139	419	20	288
South Korea	56	1	2	1	31	0	7	0	0	0	0	0	0	0	608	1 466	0	262
Philippines	0	0	0	1	0	0	0	0	0	21	33	25	55	107	148	83	156	148
UAE	0	3	3	1	8	4	3	0	0	0	0	1	1	2	0	2	11	49
Zambia	8	3	112	28	2	31	266	108	11	74	140	9	28	194	13	13	15	48

Export value and destination composition of apples, pears and quinces

The EU dominated as an export destination throughout the period, though its market share fell considerably. In 1996, the top five export destinations were EU, USA, Russia, Saudi Arabia and Zimbabwe (see *Table 27*). These five made up 87.5% of total export value and the top ten 93.9% (see *Table 25*). In 2013, the top five destinations were the EU, Malaysia, UAE, Nigeria and Russia. The market share of the top five fell to 68.7% of total export value and the top ten to 80.2%.

The EU's market share fell steadily from 74.0% in 1996-7 to 41.8% in 2012-3; most of the decline occurred after 2006. Malaysia grew dramatically as an export destination — in 1996 it accounted for just R1 million; by 2013 exports had reached R495 million (with market share growing from 0.4% to 8.8%). Seven of the top ten destinations in 2013 had less than 1% market share in 1996-7. After initial growth until 1998, exports to USA crashed; market share fell from a 6.2% in 1996-7 to 0.8% by 2002-3, and finished the period on 0.3%, falling out of the top ten. African countries, including Nigeria, Benin, Ghana and Senegal, entered the top ten.

Table 25: Changes in market composition of apple, pear and quince exports (%), 1996-2013

Export destination	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	74.0	75.7	66.2	64.6	69.2	62.8	55.3	45.3	41.8
Malaysia	0.4	1.5	4.4	4.6	4.8	5.8	7.4	9.0	8.8
UAE	0.5	0.2	0.9	2.0	2.4	3.5	4.1	4.7	6.7
Nigeria	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	4.3
Russia	2.6	1.3	0.9	2.1	2.0	3.0	5.7	4.8	4.3
Angola	1.6	0.9	2.0	1.8	1.6	1.9	1.5	3.1	3.5
Singapore	0.6	1.3	2.0	1.5	1.7	2.4	3.0	3.2	2.8
Benin	0.2	0.3	2.0	2.4	1.3	2.7	4.2	5.2	3.4
Ghana	0.2	0.2	0.2	1.1	0.8	0.8	1.0	1.5	1.9
Senegal	0.0	0.2	0.5	0.6	0.6	0.9	1.0	1.1	1.6

Export value and destination composition of grapes

The EU was the major destination for grape exports in terms of value, though from 1996 to 2013 its market share fell from 83.8% to 66.4% (see *Table 26*). In 1996, after the EU Canada (with just 2.9%), USA, Kuwait and Japan made up the top five destinations but by 2013, the other four were Russia, Hong Kong, China and Malaysia. The market concentration in the top five products fell from 92.6% in 1996 to 80.0% in 2013, and in the top ten from 96.3% to 89.9%.

Export values to Russia, China and Malaysia (in the top five) and UAE and Algeria (in the top ten) were worth R1 million or less in 1996 (see *Table 28*); by 2005, exports to Russia were worth R25 million, rising almost tenfold to R240 million by 2013 (with a 4.2% market share). Between 2006 and 2012, the export value to Hong Kong grew strongly, but crashed from R319 million to R158 million in 2013.

Table 26: Changes in market composition of grape exports (%), 1996-2013

Export destination	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
EU	80.2	78.4	79.9	76.9	82.8	76.8	76.0	67.7	64.9
Russia	0.3	0.1	0.0	0.7	1.3	1.7	3.1	3.1	4.2
Hong Kong	1.6	2.2	2.3	3.5	2.5	2.1	2.5	5.7	5.3
China	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1	1.7
Malaysia	0.3	0.3	0.3	0.9	1.0	1.3	1.9	3.0	3.0
UAE	0.6	0.9	0.9	1.3	1.2	1.9	2.1	2.8	3.2
Canada	2.8	3.7	5.1	6.2	3.5	3.7	2.7	3.5	2.4
Singapore	1.0	0.3	0.3	0.5	0.6	0.8	1.2	2.0	1.8

Changes in South Africa's global agricultural trade regime, 1996-2013

USA	4.3	6.8	5.7	2.7	1.1	2.0	0.9	1.1	1.2
Algeria	0.0	0.0	0.0	0.3	0.2	0.9	1.2	1.0	1.4

Table 27: Changes in value of apple, pear and quince exports (R million), 1996-2013

Export destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	544	726	931	888	703	829	1 252	1 438	1 673	1 532	1 530	2 340	2 894	3 121	3 000	3 337	3 905	5 925
EU	406	533	701	675	477	538	793	945	1 169	1 050	922	1 507	1 597	1 730	1 433	1 435	1 532	2 573
Malaysia	1	3	9	18	27	40	72	53	68	85	103	121	202	241	267	302	371	495
UAE	5	2	2	2	6	8	14	39	36	40	50	86	116	128	137	158	250	410
Nigeria	0	0	0	0	0	0	0	1	0	0	0	0	0	1	4	15	63	355
Russia	14	19	21	4	8	7	19	36	44	21	47	69	182	158	145	159	192	235
Angola	6	15	10	6	8	22	24	25	25	27	31	43	61	30	73	124	164	179
Singapore	3	4	9	15	12	19	18	24	22	34	44	50	86	93	100	100	119	160
Benin	1	2	2	4	12	19	32	32	16	26	39	64	134	120	133	198	183	147
Ghana	1	2	1	2	1	2	12	17	12	13	11	20	27	31	36	60	84	102
Senegal	0	0	1	2	4	4	9	8	9	11	11	24	35	26	33	38	58	95

Table 28: Changes in value of grape exports (R million), 1996-2013

Export destination	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
World	566	735	901	1 264	1 253	1 336	1 604	1 639	2 034	2 100	1 981	2 594	3 065	3 407	3 654	3 398	4 079	4 981
EU	474	570	707	991	1 008	1 061	1 212	1 281	1 684	1 740	1 522	1 993	2 334	2 585	2 434	2 340	2 579	3 305
Russia	1	4	2	0	0	1	8	15	30	25	40	37	122	82	115	101	141	240
Hong Kong	6	16	9	38	24	36	73	41	47	55	42	54	68	93	169	232	319	158
China	0	0	0	0	0	0	0	3	0	0	1	1	1	2	2	2	9	142
Malaysia	1	2	1	5	2	6	13	15	22	21	25	35	53	73	97	111	137	139
UAE	1	7	8	11	9	15	21	23	19	30	41	48	40	95	104	96	151	136
Canada	17	19	34	47	64	68	97	103	74	70	85	85	109	68	170	78	91	126
Singapore	7	6	3	4	2	5	7	9	12	12	14	24	38	42	67	77	81	86
USA	13	43	67	81	77	70	59	28	25	20	40	51	35	22	72	8	24	83
Algeria	0	0	0	0	0	1	7	3	1	5	9	33	36	45	61	12	68	62

4. TRENDS IN KEY PRODUCTS TRADED BETWEEN SOUTH AFRICA AND MAJOR INDIVIDUAL TRADING PARTNERS

4.1 Overview

This section examines trends in the types of products traded with individual trading partners. Trading partners appear in alphabetical order, and those examined are: Africa, ASEAN, Brazil, China, EU, India, Japan, Mercosur, Russia and USA. Changes in the value and the market share of the main imported and exported products are analysed.

The market for exports to the rest of Africa, which had the second highest value of all trade partners examined in this section, also had the lowest share of its total value concentrated into the top five product types. This concentration dropped over the period from 40.7% to 32.0%. Food preparations and apples, pears and quinces experienced strong growth in market share, while the proportion of the market controlled by wheat flour and cigarettes fell. Sugar was the dominant export in 2013, while cotton was the dominant import.

The profile of products exported to ASEAN underwent a considerable change, with market concentration of the top ten products falling from 84.3% to 62.2%. The market shifted away from maize and sugar towards fresh fruit: citrus fruit; grapes; and apples, pears and quinces rose sharply in value and market share after 2007. The combined market share of fruit in the top ten products rose from 10.0% to 40.7%. Palm oil and rice imports dominated throughout.

The Brazilian import market all changed significantly, with dramatic growth in the value of both sugar and poultry meat imports, from market shares of 0.1% and 10.1%, respectively to around a third of total market value for each. Three products that were dominant in 1996 — soybean oilcake, acyclic alcohols and food preparations — had virtually disappeared by 2013. Tobacco fell from a market share of 20.0% to 5.5%. Acyclic and ethyl alcohol grew, though unsteadily, from a combined market share of 2.4% to of 55.2%. Grapes and wine were also central exports.

Imports and exports to and from China underwent big changes. In terms of imports, rice, fruit juice, animal guts and sugar rose from market shares below 1% in 1996 to enter the top five most valuable products traded in 2013. Leguminous vegetables accounted for half of total import value in 1996, but had fallen to 9.5% by 2013. In terms of exports, wool grew from having a market share of 2.4% to represent over half of total export value. Animal skin exports also strengthened, from a combined market share below 1% to 11.3%. Acyclic alcohols held a strong position throughout, but the initial market share of roughly a third had halved by 2013.

Major EU trade trends include: a sharp growth in poultry meat imports towards the end of the period (market share rose from below 1% in 2010 to 21.4% in 2013); strong growth in the export market share of citrus fruit and wine; and a fall in the export market share of wool from 6.0% to 3.1%. Ethyl alcohol and soybean oil were also strong imports.

With around 60% market share, rice dominated Indian imports throughout the period. Tobacco rose from 1.9% to a peak of 17.2%, before falling to 6.4%. The market share of the two top exports in 2013, wool and acyclic alcohols, more than doubled, however, at different points the market for both peaked to around half of total export value. Fresh fruits (citrus fruit and apples, pears and quinces) underwent steady growth to a combined share of above 10%. Exports shifted away from animal hair towards wool and acyclic alcohols.

The export market to Japan was volatile. Maize value and market share started at 35.6%, dropped as low as 0.0%, and finished on 39.7%. The market share for second largest export —

citrus fruit — tripled from 4.5% to 11.7%. The market share for sugar — the third largest export in 2013 — grew from 18.6% to peak at 25.7% in 2008–9, before falling again to 7.2%.

The market for imports from Mercosur shifted away from soybean oil and the top import in 1996, sunflower-seed oil (which fell from 34.9% to 7.9%), towards sugar (which grew from below 1% to 12.3%), poultry meat (1.5% to 15.2%) and wheat (1.2% to 15.1%), while soybean oilcake dominated throughout. The value and market share of exports of acyclic alcohols and ethyl alcohols fluctuated greatly, but market share grew overall from 2.3% to 56.2%. Grapes and fruit juice grew from market shares below 1% to shares of 9.5% and 7.8%, respectively.

The value of both imports and exports from and to Russia was heavily concentrated in the top five products. This concentration rose from 94.0% to 100% for imports, and from 85.8% to 94.6% for exports. Wheat and cigarettes dominated the import market, growing from below 0% to 87.7% and 11.7%, respectively. Fruit exports grew over the period: in 1996, two of the top ten products were fresh fruits (making up 33.0% of total value). In 2013, five of the top ten were fresh fruits (making up 77.0% of total value), and four of the others involved fruit to some degree (wine, fruit and nuts, jams, and fruit juice).

Finally, the market for imports from the USA saw the rise of food preparations (3.6% to 12.2%), which became the top imported product, as well as of ethyl alcohol (1.0% to 8.4%) and sugar (0.7% to 6.0%). The value of imports of wheat was very volatile, holding market shares ranging from 4.9% to 33.6%. Dramatic growth took place in both the value and market share of exports of wine (1.8% to 21.7%, the top export), nuts (0.7% to 16.1%) and citrus fruit (0.0% to 13.4%).

4.2 Trends in the major agricultural products traded between South Africa and the rest of Africa

Changes in value and market composition of the top ten products imported from Africa

The top five imports in 1996–7 were cotton (30.6% market share), tobacco (20.3% market share), maize, tea and oilcake (see *Table 29*). In 2013, the top five were cotton (with a market share that fell steadily to 16.8%), tea, tobacco, oilcake NESOI and bananas. The market share of cotton, which dominated throughout, rose during the first half of the period from 30.6% to 39.0%, after which it declined strongly to below half this level (16.8%) by 2012–13. Tobacco also weakened considerably, from a peak of 26.1% in 1998–9 to 10.5% in 2012–13. Bananas, leguminous vegetables, bran and molasses all began with a market share below 1%, and experienced growth after 2008. The value of cotton rose from R221m in 1996 to R684m in 2013, after a slump in value from R733m in 2004 to R349m in 2006 (see *Table 30*).

Table 29: Changes in market composition of top ten products imported from Africa (%), 1996–2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
5201	cotton	30.6	30.6	25.4	34.0	39.0	21.2	19.3	20.2	16.8
0902	tea	6.5	7.0	8.8	7.3	8.1	9.5	11.6	10.7	10.5
2401	tobacco	20.3	26.1	21.1	20.7	11.9	14.6	19.3	16.8	10.5
2306	oilcake NESOI	4.1	2.8	3.2	3.1	3.6	4.4	6.6	4.4	7.4
0803	bananas	0.2	0.1	0.1	0.0	0.2	1.1	1.5	3.0	4.7
0713	leguminous vegetables	0.5	0.8	0.6	0.8	0.7	1.9	2.0	1.4	4.0
2302	bran	0.8	1.1	1.3	1.4	1.3	2.5	3.3	2.9	4.9
1803	cocoa paste	2.9	2.2	2.5	2.7	2.7	4.1	6.1	5.7	3.8
1703	molasses	0.1	0.3	0.1	0.2	0.3	1.4	2.3	3.9	4.2
1207	oil seeds	1.9	2.2	4.6	2.3	4.1	2.9	3.0	2.1	3.5



Table 30: Changes in value of top ten products imported from Africa (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	801	900	1 110	957	971	1 253	1 727	1 590	1 657	1 309	1 447	1 960	2 124	2 132	2 282	2 781	3 420	3 625
5201	cotton	221	299	409	223	214	351	599	528	733	424	349	373	422	397	372	651	498	684
0902	tea	38	73	70	75	93	103	139	103	106	134	174	150	196	296	288	255	315	425
2401	tobacco	172	173	228	313	184	286	374	314	181	171	242	257	415	407	363	488	394	349
2306	oilcake NESOI	33	36	45	13	23	48	63	41	59	47	53	97	145	134	133	92	237	282
0803	bananas	1	2	1	2	2	1	1	0	3	5	12	25	33	30	61	89	144	185
0713	leguminous vegetables	3	6	6	10	7	6	13	13	11	10	30	34	48	37	35	33	115	169
2302	bran	5	10	8	14	15	15	28	18	26	12	21	64	91	51	50	98	179	164
1803	cocoa paste	28	21	24	22	13	43	48	42	41	38	58	80	123	138	170	118	127	144
1703	molasses	1	1	4	1	0	1	3	3	7	2	9	38	31	68	83	114	152	142
1207	oil seeds NESOI	8	25	31	15	42	60	37	40	51	71	39	58	47	80	55	50	113	132

Table 31: Changes in value of top ten products exported to Africa (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	2 487	3 117	3 619	3 815	4 195	5 269	7 966	6 620	5 092	5 624	6 277	6 305	14 136	15 262	13 921	14 448	17 162	21 720
1701	cane or beet sugar	269	342	448	426	611	802	1 040	887	705	530	923	1 060	1 109	1 438	1 468	1 192	1 216	2 020
0808	apples and pears	50	76	71	72	97	113	187	193	170	177	214	317	489	464	575	778	959	1 450
1005	maize	105	515	661	473	252	233	1 237	989	704	1 430	826	138	3 900	3 606	879	458	379	1 306
2106	food preparations NESOI	60	77	96	137	179	203	258	219	196	212	302	439	585	641	789	1 003	1 063	1 254
2009	fruit juice	51	68	76	80	95	106	196	177	142	156	201	268	445	551	560	614	730	912
2204	wine	48	75	66	72	75	90	132	118	135	221	187	300	450	401	500	564	568	726
1507	soybean oil	10	8	6	11	17	37	25	8	6	3	20	4	26	64	209	622	1020	715
2208	ethyl alcohol	34	58	51	69	74	101	80	73	77	113	138	181	277	316	327	426	434	571
2402	cigarettes	111	199	224	300	500	599	436	196	201	275	484	376	344	398	501	531	711	556
1101	wheat flour	170	120	77	104	124	137	203	96	61	33	30	16	78	185	265	330	452	521

Changes in value and market composition of the top ten products exported to Africa

In 1996, the five products with the largest export value to Africa were: onions; cane or beet sugar; wheat flour; cigarettes; and water (see *Table 31*). In 2013, the top five were: cane or beet sugar; apples, pears, and quinces; maize; 'food preparations NESOI'; and fruit juice.

The export market concentration to Africa was relatively low, with the proportion of total export value for the top five products falling from 40.7% in 1996 to 32.0% in 2013 (see *Table 32*). The value of cigarette exports underwent strong growth from R111 million in 1996 to R599 million in 2001, and then fell dramatically to R196 million in 2003, ending on R556 million, with a market share of 3.3% (compared to an 11.6% share in 2000–1). The value of apple, pear and quince exports rose threefold between 2009 and 2013, from R464 million to R1.5 billion.

Table 32: Changes in market composition of top ten products exported to Africa (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1701	cane or beet sugar	10.9	11.8	14.9	13.2	11.5	15.8	8.7	9.4	8.3
0808	apples, pears and quinces	2.2	1.9	2.2	2.6	3.2	4.2	3.2	4.8	6.2
1005	maize	11.1	15.3	5.1	15.3	19.9	7.7	25.5	4.7	4.3
2106	food preparations NESOI	2.4	3.1	4.0	3.3	3.8	5.9	4.2	6.3	6.0
2009	fruit juice	2.1	2.1	2.1	2.6	2.8	3.7	3.4	4.1	4.2
2204	wine	2.2	1.9	1.7	1.7	3.3	3.9	2.9	3.7	3.3
1507	soybean oil	0.3	0.2	0.6	0.2	0.1	0.2	0.3	2.9	4.5
2208	ethyl alcohol	1.6	1.6	1.8	1.0	1.8	2.5	2.0	2.7	2.6
2402	cigarettes	5.5	7.1	11.6	4.3	4.4	6.8	2.5	3.6	3.3
1101	wheat flour	5.2	2.4	2.8	2.1	0.9	0.4	0.9	2.1	2.5

4.3 Trends in the major agricultural products traded between South Africa and ASEAN

Changes in value and market composition of the top ten products imported from ASEAN

Of the top ten import values in 2013, only margarine and cocoa powder did not feature in the top ten in 1996 (see *Table 35*). In 1996, the top five were rice, palm oil, coffee, coconut oil, and vegetable fats and oils, while in 2013 the top five were palm oil, rice, coconut oil, coffee, and pepper (genus piper).

In the heavily concentrated market, palm oil and rice consistently account for half or more of total import value. In 1996, the top five products made up 81.8% of total import value, which fell slightly by 2013 to 77.6% (see *Table 33*). Coffee and coconut oil fell steadily from above 10% to 4.4% and 3.3%, respectively.

Table 33: Changes in market composition of top ten products imported from ASEAN (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1511	palm oil	24.7	27.9	28.1	37.3	28.9	30.8	30.1	35.9	39.6
1006	rice	30.1	31.6	34.5	28.9	40.7	33.9	41.1	34.6	28.1
1513	coconut oil	10.4	8.7	6.7	5.9	5.8	4.7	4.2	5.0	4.4
0901	coffee	10.1	8.6	5.4	3.6	3.6	4.6	3.9	3.3	3.3
0904	pepper, genus piper	2.0	2.3	1.8	1.0	0.7	0.9	0.7	1.1	1.9
1804	cocoa butter	3.4	2.9	2.7	2.6	2.6	2.6	2.3	2.1	1.7
0801	coconuts, brazil nuts & cashew	1.0	1.1	0.9	1.1	1.1	1.1	1.1	1.6	1.8
1805	cocoa powder	0.2	0.4	0.9	2.2	0.8	0.7	0.6	1.6	1.7
1516	vegetable fats and oils	6.2	5.3	4.7	3.3	2.1	2.5	2.1	1.6	1.5
1517	margarine	1.3	2.5	3.0	2.9	2.1	2.9	2.6	1.6	1.2

Changes in the value and market composition of the top ten largest products exported to ASEAN

Over the period, the composition of exported products to ASEAN has shifted to fresh fruits. The top five products in 1996, which made up 84.3% of the total market, were maize, cane or beet sugar, fruit and nuts, milk and cream, and citrus fruit (see *Table 34*). In 2013, the top five were: apples, pears and quinces; citrus fruit; cane or beet sugar; grapes; and acyclic alcohols. By 2012-13 the concentration of the market within the top five products had fallen to 54.5%.

Apples, pears and quinces rose over the period from R6 million to R721 million (2.4% to 20.4% market share), with R522 million of this rise occurring after 2007 (see *Table 36*). The value of exports of citrus fruit rose from R13 million to R392 million, and almost half of this growth occurred after 2011. Grape exports grew from R10 million to R281m, with over half of growth taking place after 2009. Between them, these three product groups made up 40.7% of the market. The value of maize exports fell sharply between 1996 and 1997 from R196 million to R2 million, and did not reach above R100 million until 2008, finishing at R190 million. Nuts NESOI and soybeans did not emerge as prominent exports until 2013 and 2009, respectively.

Table 34: Changes in market composition of top ten products exported to ASEAN (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
0808	apples, pears and quinces	2.4	8.1	8.5	12.1	14.4	20.6	17.9	21.4	20.4
0805	citrus fruit	4.1	11.2	3.9	5.9	7.6	15.0	8.8	10.3	11.3
1701	cane or beet sugar	31.5	27.3	28.9	17.4	20.5	6.3	18.6	1.2	8.0
0806	grapes	3.0	2.9	1.9	4.6	6.2	10.4	6.7	11.3	9.0
2905	acyclic alcohols	0.2	0.3	7.7	15.5	10.0	10.1	6.4	4.4	5.8
1005	maize	27.8	0.7	0.9	0.6	4.2	4.0	7.5	9.7	6.0
2207	ethyl alcohol	0.2	0.6	9.4	11.7	6.2	4.3	4.7	4.1	3.8
0802	nuts NESOI	0.0	0.0	0.1	0.2	0.0	0.8	0.5	0.8	2.7
2008	fruit and nuts, prepared	8.8	6.9	4.0	6.1	7.6	5.9	3.5	3.0	2.7
1201	soybeans	0.0	0.0	0.0	0.0	0.0	0.0	5.1	13.1	12.8

Table 35: Changes in value of top ten products imported from ASEAN (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	918	1 020	1 280	1 345	1 189	1 450	1 981	2 017	2 547	2 440	2 785	4 190	7 993	6 511	6 506	7 720	7 847	7 827
1511	palm oil	231	248	374	359	319	422	760	730	783	659	791	1 358	2 414	1 957	2 172	2 932	3 221	2 983
1006	rice	268	315	404	425	349	561	530	628	1 071	957	983	1 379	3 191	2 765	2 406	2 512	2 073	2 337
1513	coconut oil	93	109	112	115	96	79	112	125	138	152	144	188	392	217	295	409	376	314
0901	coffee	99	98	116	109	96	46	69	76	69	110	141	178	391	178	208	259	242	269
0904	pepper, genus piper	14	24	30	30	29	18	22	18	16	16	23	39	52	47	59	104	119	172
1804	cocoa butter	30	35	49	29	21	49	55	48	53	77	75	105	160	174	185	116	113	154
0801	coconuts, brazil nuts & cashew	11	8	11	17	12	13	24	19	21	32	31	47	90	75	77	151	142	138
1805	cocoa powder	2	2	5	7	10	14	36	52	22	21	21	29	36	52	87	140	138	134
1516	vegetable fats and oils	62	58	43	94	68	57	84	49	47	56	73	103	166	135	110	121	109	124
1517	margarine	6	19	31	36	41	39	71	45	50	55	80	120	197	177	137	83	90	102

Table 36: Changes in value of top ten products exported to ASEAN (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	452	260	280	394	337	983	940	679	608	1 081	750	1 054	1 457	2 193	2 169	1 842	3 020	3 200
0808	apples, pears and quinces	6	11	20	35	43	69	106	91	105	137	173	199	304	350	401	458	546	721
0805	citrus fruit	13	16	24	51	25	26	38	57	51	78	109	163	145	177	195	217	313	392
1701	cane or beet sugar	126	98	93	91	50	332	162	120	11	335	24	89	72	608	48	0	143	357
0806	grapes	10	12	6	14	8	17	34	41	57	48	72	116	115	128	202	251	281	281
2905	acyclic alcohols	0	1	1	1	37	65	156	95	107	62	75	107	143	92	95	82	125	238
1005	maize	196	2	2	3	2	9	4	5	5	66	39	33	155	119	289	99	181	190
2207	ethyl alcohol	1	1	1	3	19	104	128	62	40	66	46	32	70	101	68	97	92	146
0802	nuts NESOI	0	0	0	0	1	1	3	0	0	0	2	12	8	11	12	19	48	122
2008	fruit & nuts, prepared	32	30	17	29	27	26	45	54	68	60	37	69	66	63	54	66	71	97
1201	soybeans	0	0	0	0	0	0	0	0	0	1	0	0	0	186	373	150	709	86

4.4 Trends in the major agricultural products traded between South Africa and Brazil

Changes in the value and market composition of the top ten products imported from Brazil

The composition of imports from Brazil changed considerably over the period. In 1996, the top five products were soybean oilcake, tobacco, acyclic alcohols, coffee and food preparations NESOI. By 2013, soybean oilcake, acyclic alcohols and food preparations NESOI, had almost disappeared from the export profile. Only tobacco, featured in the top five of both 1996 and 2013. Concentration of the market into the top five products rose from 77.0% in 1996 to 90.5% in 2013 (see *Table 37*).

Sugar and poultry meat imports rose, while tobacco declined. The top import in 2013, cane or beet sugar, an import value of R1 million for the first time only as late as 2003, but by 2013 was worth R1.1 billion (see *Table 38*). Poultry meat rose dramatically in value and market share, with a particular surge between 2003 (import value R270 million) and 2007 (R1.2 billion). Wheat, gelatin, rice and ethyl alcohol only became prominent imports after 2008. Tobacco underwent slow, unsteady growth in value, resulting in a substantial decline in market share. The market share held by coffee also declined markedly (from 7.4% to 1.1%), particularly between 1996 and 2002.

Table 37: Changes in market composition of top ten products imported from Brazil (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1701	cane or beet sugar	0.1	0.0	0.0	0.0	1.4	5.6	11.7	15.5	30.0
0207	poultry meat	10.1	14.8	25.1	23.0	35.1	47.9	33.0	44.5	33.3
1001	wheat	0.0	0.0	0.0	0.0	0.0	0.0	1.1	3.8	14.4
2401	tobacco	20.0	31.2	14.9	11.1	9.8	7.4	13.0	10.4	5.5
3503	gelatin	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.6	1.6
0901	coffee	7.4	5.4	2.5	0.8	0.6	0.7	0.8	1.5	1.1
2009	fruit juice	1.2	0.6	0.0	0.2	0.5	0.6	0.2	0.4	1.1
1006	rice	0.0	0.0	0.2	0.0	0.0	0.0	5.4	5.4	3.4
2208	ethyl alcohol	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.7
1704	sugar confection	0.6	4.2	7.1	5.1	8.3	6.8	4.0	1.8	0.7

Changes in the value and market composition of the top ten largest products exported to Brazil

In 1996, exports to Brazil were almost exclusively the top five products, which made up 98.6% of total export value (see *Table 40*). Ethyl alcohol (HS code 2207 – undenatured) alone held an 85.3% market share, followed by beer, acyclic alcohols, titanium oxides and maize. By 2013, the market share of the top five products had fallen to 81.7%. The top five products were acyclic alcohols, ethyl alcohol (HS code 2208 – spirit beverage), grapes, wine and fruit juice.

Acyclic alcohols underwent a surge in value between 2003 (R20m) and 2005 (R47m), and, until 2009, consistently made up about half of the total export value (see *Table 39*). In 2009, product value fell to almost half its 2008 level, and did not recover until a surge in 2013 from R46 million to R117 million. The combined export value of acyclic and ethyl alcohol was 55.2% in 2012–13. Grapes experienced a sharp rise in value from R4 million in 2011 to R30 million in 2012, and this level was maintained into 2013 (R27 million). Wine grew from R1 million in 1996 to R23 million in 2013, with over half of this growth occurring after 2006. Between 2009 and 2013, fruit juice rose in value sevenfold from R2 million to R14 million.

Table 38: Changes in value of top ten products imported from Brazil (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	179	168	154	141	206	536	1 005	1 000	1 625	2 003	1 803	2 709	3 559	3 469	2 638	3 605	4 359	4 750
1701	cane or beet sugar	0	0	0	0	0	0	0	1	10	41	42	212	417	403	276	689	883	1 850
0207	poultry	7	28	17	27	61	126	190	270	565	709	930	1 230	1 191	1 131	1 306	1 471	1 493	1 540
1001	wheat	0	0	0	0	0	0	0	0	0	0	0	0	0	75	157	80	725	585
2401	tobacco	41	29	56	36	42	68	105	118	247	109	193	141	192	719	356	292	289	210
3503	gelatin	0	0	0	0	0	0	0	0	0	0	0	0	1	12	16	19	35	113
0901	coffee	9	17	9	7	11	8	8	8	9	13	17	14	29	26	35	60	48	57
2009	fruit juice	4	0	1	1	0	0	0	3	5	12	4	22	10	5	9	17	46	52
1006	rice	0	0	0	0	0	1	0	0	0	1	0	1	57	321	17	318	274	37
2208	ethyl alcohol	0	0	0	0	0	0	0	0	0	0	0	1	0	2	10	20	31	35
1704	sugar confection	0	2	4	9	21	31	35	68	125	176	173	132	140	144	63	52	36	30

Table 39: Changes in value of top ten products exported to Brazil (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	382	304	27	26	69	48	182	55	49	81	97	83	122	108	144	119	168	270
2905	cyclic alcohols	10	4	2	4	4	5	9	12	20	41	47	30	61	31	37	28	46	117
2208	ethyl alcohol	1	1	7	3	4	12	8	7	5	11	19	21	25	25	35	39	38	40
0806	grapes	0	0	2	0	0	1	1	0	0	0	0	2	3	5	14	4	30	27
2204	wine	1	3	2	0	2	1	2	4	8	8	7	12	12	15	30	21	23	23
2009	fruit juice	1	1	0	0	0	0	0	0	0	1	1	2	2	2	8	13	14	14
1209	seeds for sowing	0	0	1	1	3	3	2	1	1	4	2	2	2	8	3	4	7	12
1207	oil seeds NESOI	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	4	0	8
0505	bird skins	1	2	2	1	2	2	3	2	2	4	6	1	3	4	3	0	2	7
1005	maize	6	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7
0910	ginger, saffron & tumeric	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	3

Table 40: Changes in market composition of top ten products exported to Brazil (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2905	acyclic alcohols	2.1	12.3	8.2	9.0	46.7	43.3	40.3	24.5	37.3
2208	ethyl alcohol	0.3	20.3	13.4	6.3	12.4	22.3	21.8	27.9	17.9
0806	grapes	0.0	4.0	0.9	0.3	0.0	0.9	3.4	6.6	13.0
2204	wine	0.6	5.2	2.5	2.4	11.8	10.1	11.9	19.1	10.5
2009	fruit juice	0.2	0.6	0.1	0.0	0.5	1.3	1.9	8.1	6.3
1209	seeds for sowing	0.1	4.0	4.7	1.1	4.3	2.4	4.5	2.7	4.3
1207	oil seeds NESOI	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	1.8
0505	bird skins	0.4	4.6	3.3	1.9	4.7	3.8	3.1	1.4	2.2
1005	maize	1.0	1.2	0.1	0.0	0.0	0.0	0.0	0.0	1.7
0910	ginger, saffron & tumeric	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.9

4.5 Trends in the major agricultural products traded between South Africa and China

Changes in the value and market composition of the top ten products imported from China

In 1996, the top five imports made up 87.6% of the market (see *Table 41*). Leguminous vegetables had the highest value, with 51.1% market share, followed by poultry meat, peanuts, dried vegetables and hog hair. In 2013, the top five were rice (38.8% market share), fruit juice, animal guts, leguminous vegetables, and 'sugars NESOI'. Market concentration of the top five products fell considerably to 68.2%.

Rice made virtually no contribution to total import value from China until 2006, when its value rose to R18 million, surging further in 2012 from R22 million in 2011 to R1.8 billion, ending in 2013 on R1.6 billion, with 39.7% market share (see *Table 42*). Poultry meat, peanuts and hog hair had fallen to well below a 1% combined market share by 2013. Leguminous vegetables had grown to over ten times their 1996 value by 2012 (after which value dropped dramatically from R576 million to R250 million), yet this growth rate did not keep up with overall growth, nor the growth in rice, fruit juice and animal guts, so leguminous vegetable market share fell from 49.9% in 1996-97 to 9.5% in 2012-13. In terms of market share, animal guts began with a 0.1% share, peaked at 24.1% in 2004-5, and ended on 8.9%.

Table 41: Changes in market composition of top ten products imported from China (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1006	rice	0.1	0.3	0.7	0.5	0.3	1.8	11.5	3.8	39.7
2009	fruit juice	0.4	8.8	6.7	2.8	6.6	12.3	12.0	13.2	10.1
0504	animal guts	0.1	3.4	15.0	10.3	24.1	18.1	18.5	16.7	8.9
0713	leguminous vegetables	49.9	37.0	17.8	21.4	21.2	19.4	19.1	20.3	9.5
1702	sugars NESOI	0.0	0.0	0.0	0.5	2.1	2.6	2.9	3.4	2.7
2002	tomatoes	0.0	0.0	0.9	1.5	4.3	3.3	4.0	3.0	2.6
2309	animal feed preparations	0.1	0.2	0.5	1.2	3.1	2.2	2.1	2.7	2.0
0712	vegetables	3.9	3.1	2.6	1.8	3.6	3.3	1.5	3.2	1.8
2823	titanium oxides	0.3	0.1	0.3	0.1	0.4	0.2	0.4	1.4	1.8

Changes in South Africa's global agricultural trade regime, 1996-2013

1704	sugar confection	1.7	0.8	0.3	0.3	1.9	1.4	0.9	1.8	1.6
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Table 42: Changes in value of top ten products imported from China (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	108	157	198	228	246	248	536	828	487	569	841	1273	1 663	1 989	1 932	2 122	4 399	4 318
1006	rice	0	0	0	1	2	1	2	5	2	1	18	19	126	295	132	22	1 825	1 639
2009	fruit juice	0	1	15	22	28	6	16	23	19	51	68	191	168	271	232	302	340	540
0504	animal guts	0	0	1	13	24	50	69	72	96	158	170	212	364	311	316	360	381	394
0713	leguminous vegetables	55	77	79	78	53	35	99	194	109	114	161	249	312	386	404	419	576	250
1702	sugars NESOI	0	0	0	0	0	0	1	6	8	14	17	37	47	60	71	68	112	121
2002	tomatoes	0	0	0	0	0	4	3	18	25	20	33	38	66	79	58	63	110	115
2309	animal feed preparations	0	0	1	0	0	2	8	8	16	16	21	24	52	24	33	75	81	90
0712	vegetables	3	7	6	7	5	8	11	13	15	23	32	38	26	28	64	65	67	88
2823	titanium oxides	1	0	0	0	1	0	1	0	1	3	1	3	1	12	20	36	72	82
1704	sugar confection	0	4	3	0	1	0	0	4	13	8	13	16	17	17	30	42	56	81

Table 43: Changes in value of top ten products exported to China (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	60	61	45	76	78	173	141	344	422	625	701	1 189	1 593	1 693	2 034	2 031	2 914	3 682
5101	wool	1	2	2	15	31	37	12	5	2	43	223	394	576	939	480	849	1 459	1 900
2905	acyclic alcohols	13	25	11	13	12	52	54	167	199	201	179	361	507	294	733	435	563	435
4102	skins of sheep	0	0	3	4	7	8	1	3	10	24	28	42	77	51	102	99	89	328
4101	skins of bovine animals	0	0	0	0	0	0	4	8	27	24	12	20	27	40	60	70	90	240
0805	citrus fruit	0	0	1	3	1	0	6	8	4	22	8	12	14	20	33	73	101	221
2204	wine	0	1	0	1	0	1	1	1	2	4	9	19	49	55	79	147	236	214
0806	grapes	0	0	0	0	0	0	0	3	0	0	1	1	1	2	2	2	9	142
2008	fruit and nuts	0	0	0	0	0	0	2	7	4	3	2	2	2	7	14	16	25	48
2301	flour of meat	0	0	1	0	0	0	14	2	16	51	35	97	74	69	280	132	208	21
2401	tobacco	1	2	0	7	5	49	17	70	57	30	19	121	95	38	44	18	0	21

Changes in the value and market composition of the top ten products exported to China

In 1996 the top five exports to China constituted 91.4% of the market. In 2013, this figure remained very high, at 84.8%, but the portfolio had changed considerably (see *Table 44*). In 1996, the top five products were barley, cane or beet sugar, acyclic alcohols, animal hair and maize, but by 2013, were wool, acyclic alcohols, sheepskins, bovine skins, and citrus fruit.

Six of the top ten products in 2013, and three of the top five, had a market share below 1% in 1996. Wool, which by 2013 made up over half of the total market, grew rapidly from R1 million in 1996 to R43 million in 2005, to its final level of R1.9 billion in 2013 (see *Table 43*).

The value and market share of acyclic alcohols fluctuated greatly, but stayed prominent throughout. Both bovine and sheepskins surged in value between 2012 and 2013, with combined market share rising from below 1% to 11.3%. Wine and citrus fruit also rose considerably.

Table 44: Changes in market composition of top ten products exported to China (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
5101	wool	2.4	14.5	26.8	3.5	4.2	32.7	46.1	32.7	50.9
2905	acyclic alcohols	31.3	19.6	25.7	45.6	38.3	28.6	24.4	28.7	15.1
4102	sheepskins	0.0	5.1	6.1	0.7	3.2	3.7	3.9	5.0	6.3
4101	bovine skins	0.1	0.4	0.2	2.4	4.8	1.7	2.0	3.2	5.0
0805	citrus fruit	0.0	3.6	0.4	2.9	2.5	1.1	1.0	2.6	4.9
2204	wine	1.0	1.1	0.4	0.5	0.7	1.5	3.2	5.6	6.8
0806	grapes	0.0	0.1	0.1	0.6	0.0	0.1	0.1	0.1	2.3
2008	fruit & nuts	0.0	0.2	0.1	1.9	0.7	0.2	0.3	0.7	1.1
2301	flour of meat	0.0	0.6	0.0	3.3	6.4	7.0	4.3	10.1	3.5
2401	tobacco	2.4	5.6	21.6	18.0	8.3	7.4	4.0	1.5	0.3

4.6 Trends in the major agricultural products traded between South Africa and the EU

Changes in the value and market composition of the top ten products imported from the EU

The market concentration into the top five imports from the EU remained relatively low throughout the period — in 1996, it was 40.9%, and in 2013, it was 46.1% (see *Table 45*). The top five products in 1996 were ethyl alcohol, malt, animal cuts, acyclic alcohols and bovine meat. In 2013, ethyl alcohol remained the import with the highest value, followed by poultry meat, soybean oil, food preparations NESOI and sunflower-seed oil.

The value of poultry meat imports remained below R100 million – and as a result the product declined in market share – until 2011, when it rose from R83 million in 2010 to R760 million, finishing on R1.9 billion in 2013 (with a 21.4% market share) (see *Table 47*). Imports of both animal guts and bovine meat had fallen to a market share of below 1% by 2002, and did not recover for the rest of the period.

Both soybean oil and sunflower-seed oil saw dramatic surges in value towards the end of the period, with soybean oil growing in value from R54 million in 2009 to R1.3 billion in 2010,

reaching a peak of R2.2 billion in 2011, and then dropping down to R1.3 billion by 2013. This resulted in a market share of 9.5% during 2012–13, having not exceeded 1% until 2008. Imports of sunflower-seed oil did not exceed R10 million until 2012, when value rose from R5 million to R308 million, finishing on R840 million (with a 3.3% market share).

Table 45: Changes in market composition of top ten products imported from the EU (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2208	ethyl alcohol	17.2	19.7	15.1	15.7	18.5	20.0	17.6	17.2	16.6
0207	poultry meat	2.2	2.2	1.4	0.8	1.0	0.5	0.3	3.5	9.7
1507	soybean oil	0.1	0.1	0.0	0.0	0.2	0.2	1.1	14.4	9.5
2106	food preparations NESOI	3.8	5.4	7.3	6.3	6.9	7.3	6.1	4.8	5.3
1512	sunflower-seed oil	0.0	0.0	0.0	0.1	0.0	0.1	0.1	0.2	3.3
2309	animal feed preparations	2.1	3.1	4.0	3.2	3.0	3.5	3.6	4.0	4.0
1806	chocolate	1.9	1.8	1.8	1.1	2.8	2.9	2.0	2.4	3.6
2101	coffee	0.4	0.6	0.6	0.7	1.0	1.0	1.2	1.2	2.5
2202	waters	0.3	1.9	3.1	2.7	2.9	4.0	3.6	2.1	2.6
0203	pork	2.4	2.1	2.8	2.3	2.4	3.3	2.2	3.2	2.8

Changes in the value and market composition of the top ten products exported to the EU

Fresh fruits dominate the export market to the EU, making up four of the top five products with the highest value (the other being wine). In 1996, the top five exports to the EU were: grapes; wine; citrus fruit; apples, pears and quinces; and fruit and nuts. In 2013, the top five were: wine; citrus fruit; grapes; apples, pears and quinces; and dates, figs and pineapples.

The five fresh fruit imports that feature in the top ten account for 47.5% of total import value. Citrus fruit; grapes; dates, figs and pineapples; and apricots, cherries and peaches all grew in market share over the period (though grapes saw a decline during the second half). Citrus fruit rose the most, from R417 million to R3.8 billion. The market share of apples, pears and quinces initially declined, from 11.7% in 1998–9 to 7.2% in 2000–1, and did not at any point exceed its initial share, finishing at 10.0%.

Wine grew to hold a dominant position over the period, peaking at 26.7% market share between 2008 and 2009, falling back somewhat to 21.4% by 2013. In terms of value, by 2013 it had grown to over ten times its 1996 value. The market share of wool finished on just over half its initial value, at 3.1%.

Table 46: Changes in market composition of top ten products exported to the EU (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2204	wine	10.7	14.6	20.8	24.0	24.7	25.8	26.7	23.3	21.4
0805	citrus fruit	10.9	15.1	13.1	10.8	12.5	13.6	14.7	16.2	16.5
0806	grapes	11.5	14.5	14.6	11.9	14.7	14.5	14.6	14.5	14.4
0808	apples, pears & quinces	10.4	11.7	7.2	8.3	9.6	10.1	9.9	8.7	10.0
0804	dates, figs & pineapples	1.9	2.7	2.3	2.5	2.0	1.9	1.8	2.0	3.4
0809	apricots, cherries & peaches	2.3	3.1	2.8	2.4	2.3	2.0	2.6	3.1	3.2
2905	cyclic alcohols	0.5	0.7	0.9	1.5	2.5	2.9	3.3	3.2	3.3
5101	wool	6.0	5.2	4.4	6.0	4.4	4.5	2.0	3.7	3.1

2008	fruit and nuts	8.3	7.0	5.1	5.8	4.6	4.3	4.2	3.7	3.1
4102	skins of sheep	5.0	2.5	2.6	3.3	1.9	1.8	1.4	1.7	2.5

Table 47: Changes in value of top ten products imported from the EU (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	2 019	2 440	2 596	2 572	2 820	2 899	3 612	3 546	3 705	4 358	5 567	7 515	9 627	10 023	10 717	13 669	16 148	18 591
2208	ethyl alcohol	349	419	515	502	387	479	573	550	683	808	1 146	1 473	1 754	1 700	1 968	2 225	2 430	3 346
0207	poultry meat	41	58	58	55	45	37	21	36	49	31	39	32	37	29	83	760	1 456	1 925
1507	soybean oil	3	1	0	4	2	0	0	0	12	1	0	25	162	54	1 326	2 193	1 916	1 398
2106	food preparations NESOI	86	84	116	164	188	231	239	212	235	323	419	541	647	558	518	643	777	1 062
1512	sunflower-seed oil	0	0	0	0	0	0	10	0	0	2	4	5	9	9	48	5	308	840
2309	animal feed preparations	43	51	71	89	103	124	124	102	108	131	180	277	365	348	418	555	650	735
1806	chocolate	43	44	58	36	48	56	36	40	80	144	204	170	200	196	236	353	540	696
2101	coffee	8	10	16	16	16	17	22	28	38	44	67	67	122	104	122	170	368	498
2202	waters	5	6	26	74	82	97	99	97	89	147	207	314	391	321	252	251	419	497
0203	pork	59	50	42	65	75	87	95	71	93	98	209	219	215	225	344	439	546	437

Table 48: Changes in value of top ten products exported to the EU (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	4 250	4 792	5 532	6 206	6 417	7 713	10 566	10 448	11 441	11 790	10 511	13 653	17 390	16 193	16 291	16 705	17 299	23 567
2204	wine	419	553	743	966	1 363	1 579	2 427	2 620	2 790	2 944	2 687	3 536	4 503	4 450	4 003	3 697	3 712	5 046
0805	citrus fruit	417	570	829	946	867	983	1 101	1 163	1 409	1 505	1 285	1 992	2 696	2 224	2 628	2 726	2 932	3 805
0806	grapes	474	570	707	991	1 008	1 061	1 212	1 281	1 684	1 740	1 522	1 993	2 334	2 585	2 434	2 340	2 579	3 305
0808	apples, pears and quinces	406	533	701	675	477	538	793	945	1 169	1 050	922	1 507	1 597	1 730	1 433	1 435	1 532	2 573
0804	dates, figs and pineapples	92	84	178	134	167	155	252	264	194	276	185	278	334	275	404	271	602	794
0809	apricots, cherries and peaches	69	139	140	225	175	214	244	253	277	261	203	284	378	485	458	578	546	757
2905	acyclic alcohols	22	24	35	50	61	68	102	207	347	229	298	414	712	398	513	549	595	734
5101	wool	272	273	291	317	282	337	685	576	537	474	480	606	473	201	511	711	585	684
2008	fruit and nuts	402	345	407	417	326	391	567	647	553	519	509	539	694	717	647	577	589	676
4102	skins of sheep	247	209	160	138	133	236	381	316	256	188	173	268	271	205	225	320	340	666

4.7 Trends in the major agricultural products traded between South Africa and India

Changes in the value and market composition of the top ten products imported from India

In 1996, the top five imports were: rice; ginger, saffron and turmeric; vegetable extracts; tobacco; and peanuts. In 2013, the top five were rice, tobacco, vegetable extracts, pepper (genus piper) and fennel seeds.

Rice dominated the import market throughout, despite a sink between 2008 and 2010, when value plummeted from R659 million in 2007 to R150 million in 2010 (though even during this period it was the second most valuable import) (see *Table 50*). It finished in 2013 with a value of R2.1 billion, and a 61.1% share of the market (see *Table 49*). No other product exceeded a 10% market share, apart from tobacco during the sink in the value of rice imports. By 2013 the value of tobacco had risen to almost twenty times its 1996 value at R157 million, though it had receded considerably from its 2010 peak of R267 million.

Table 49: Changes in market composition of top ten products imported from India (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1006	rice	60.5	60.8	50.7	69.4	60.3	59.7	28.7	23.9	61.1
2401	tobacco	1.9	3.5	3.5	5.6	4.5	6.0	16.2	17.2	6.4
1302	vegetable extracts	2.7	3.6	6.4	4.2	5.0	1.9	1.9	5.6	2.5
0904	pepper, genus piper	2.1	2.2	2.2	1.7	2.2	2.1	3.6	3.8	2.7
0909	fennel seeds	2.8	2.8	5.7	2.2	2.2	1.6	3.2	2.4	2.1
0910	ginger, saffron & turmeric	3.6	4.4	6.2	2.9	3.2	2.2	4.4	6.7	2.4
3301	essential oils resinoid	0.3	0.6	1.2	0.9	2.0	1.8	2.7	3.3	2.2
2306	oilcake NESOI	0.0	0.0	0.0	0.0	0.0	0.1	0.8	2.6	1.6
2101	extracts of coffee	0.0	0.0	0.1	0.4	1.8	3.4	4.3	6.6	2.1
0712	dried vegetables	0.8	0.6	0.8	0.6	1.2	1.6	1.7	2.1	1.4

Changes in the value and market share of the top ten products exported to India

In 1996, the five most valuable exports to India were fine or coarse animal hair, wool, acyclic alcohols, waste of wool and ethyl alcohol. In 2013, the top five were: wool, acyclic alcohols, cane or beet sugar, apples, pears and quinces, and citrus fruit. The market concentration of the top five fell dramatically from 94.5% to just 33.9%, with market composition undergoing a number of large shifts (see *Table 52*).

In 1996, fine or coarse animal hair had a 56.3% market share, but it fell to less than half of this value in 1997, and from 2008 on, market share remained below 1%. The value of wool increased from R6 million to R238 million, with a 44.2% market share by 2012-13 (see *Table 51*). The acyclic alcohols market share peaked in 2002-3 with 51.0%, falling steeply to 3.1% in 2006-7, then rising to 26.6% in 2012-13. Cane or beet sugar was similarly volatile, with values ranging from 0.1% to 37.2%, ending on with 6.2% (R73 million). Comparatively, apples, pears and quinces, and citrus fruit saw a steady rise from 0.0% shares to 5.2% and 5.4%, respectively.

Table 50: Changes in value of top ten products imported from India (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	227	414	378	302	255	262	658	586	436	704	972	1 198	1 146	883	1 108	1 569	2 248	3 116
1006	rice	153	234	213	200	138	124	466	398	218	469	636	659	398	184	150	491	1 217	2 061
2401	tobacco	8	4	14	10	7	12	41	28	27	25	57	73	111	217	267	195	187	157
1302	vegetable extracts	8	9	13	11	13	20	27	25	28	30	20	22	22	17	58	91	62	74
0904	pepper, genus piper	3	10	12	3	7	5	8	14	13	12	14	32	43	31	40	61	78	68
0909	fennel seeds	5	14	11	8	12	18	19	8	14	11	13	23	40	26	34	31	51	63
0910	ginger, saffron & tumeric	8	14	16	14	16	16	18	18	18	19	20	26	41	49	88	92	69	62
3301	essential oils resinoid	1	1	2	2	3	3	5	6	7	16	20	20	32	23	36	52	56	61
2306	oilcake NESOI	0	0	0	0	0	0	0	0	0	0	0	2	11	6	23	48	28	56
2101	extracts of coffee	0	0	0	0	0	0	0	5	8	13	17	56	49	38	99	77	56	55
0712	dried vegetables	1	4	2	2	2	2	4	4	8	6	10	24	14	20	30	26	35	40

Table 51: Changes in value of top ten products exported to India (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	21	50	25	39	37	87	106	113	194	159	62	247	251	352	457	469	554	615
5101	wool	6	10	11	3	2	6	14	21	15	43	39	117	165	146	235	248	278	238
2905	acyclic alcohols	1	3	4	13	15	20	48	64	61	32	0	9	0	72	137	151	149	161
1701	cane or beet sugar	0	28	1	0	0	46	0	0	69	61	0	80	39	81	13	0	0	73
0808	apples, pears & quinces	0	0	0	0	1	1	1	3	7	4	4	6	11	11	15	26	31	30
0805	citrus fruit	0	0	0	0	0	0	1	1	1	1	1	5	3	5	17	9	39	25
4102	skins of sheep	0	0	0	0	1	1	0	2	0	0	0	0	1	1	1	3	15	22
2207	ethyl alcohol	1	3	1	9	1	0	0	1	10	0	0	1	2	6	2	2	6	20
0713	leguminous vegetables	0	0	1	3	0	0	0	0	0	1	2	0	0	0	4	0	0	10
2009	fruit juice	0	0	0	0	0	0	1	1	1	2	3	3	4	6	8	8	13	6
1005	maize	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5

Table 52: Changes in market composition of top ten products exported to India (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
5101	wool	21.4	23.3	7.1	16.1	16.4	50.4	51.5	52.2	44.2
2905	acyclic alcohols	6.2	26.2	28.4	51.0	26.2	3.1	11.9	31.1	26.6
1701	cane or beet sugar	39.3	1.6	37.2	0.1	37.0	26.0	19.9	1.4	6.2
0808	apples, pears & quinces	0.0	0.2	1.7	2.0	3.2	3.0	3.6	4.4	5.2
0805	citrus fruit	0.0	0.5	0.2	0.6	0.7	1.8	1.4	2.8	5.4
4102	skins of sheep	0.5	0.7	1.0	0.7	0.0	0.1	0.4	0.5	3.1
2207	ethyl alcohol	5.3	16.5	1.0	0.4	2.8	0.3	1.4	0.4	2.2
0713	leguminous vegetables	0.0	6.1	0.0	0.2	0.3	0.5	0.0	0.5	0.8
2009	fruit juice	0.0	0.1	0.4	1.1	1.0	1.9	1.6	1.7	1.6
1005	maize	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.4

4.8 Trends in the major agricultural products traded between South Africa and Japan

Changes in the value and market composition of the top ten products imported from Japan

The market for Japanese imports is very small compared to other import sources studied; note that the figures for import value in *Table 54* are measured in thousands, not millions of Rand.

In 1996, the top five imports were acyclic alcohols, seeds for sowing, dextrans, food preparations NESOI, and animal feed preparations. In 2013, the top five were acyclic alcohols, seeds for sowing, sauces, coffee extracts, and food preparations NESOI. Market concentration for the top five products fell from 83.1% to 64.2% (see *Table 53*).

Starting with a 54.0% market share, the value of acyclic alcohols declined from R6.4 million in 1996 to R0.6 million in 2007, rose to peak at R10.0 million in 2010, then fell slightly to R9.4 million in 2013. The most valuable import between 2000 and 2009, seeds for sowing, underwent an almost opposite path, peaking at R8.7 million in 2002, then falling to R4.2 million by 2013.

Table 53: Changes in market composition of top ten products imported from Japan (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2905	acyclic alcohols	54.0	45.5	22.9	12.4	14.9	8.5	6.3	39.5	27.2
1209	seeds for sowing	18.3	25.1	39.8	42.5	28.8	17.4	23.1	16.2	9.9
2103	saucers	1.2	2.3	6.4	7.4	8.1	6.6	6.3	8.3	21.8
2101	extracts of coffee	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	2.5
2106	food preparations NESOI	3.0	3.1	3.9	7.0	5.8	5.3	8.4	6.6	4.6
2208	ethyl alcohol	0.0	0.6	0.0	0.0	0.1	1.5	2.5	0.2	2.0
2823	titanium oxides	1.2	1.0	0.0	0.0	12.3	26.2	9.2	4.0	4.6
2002	tomatoes NESOI	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	1.6
1516	vegetable fats and oils	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.0
2309	animal feed preparations	3.7	4.8	4.0	0.6	2.0	1.0	1.2	1.2	1.5

Table 54: Changes in value of top ten products imported from Japan (R thousands), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	12 324	15 520	17 816	14 430	12 955	12 857	18 711	15 525	14 435	13 480	16 096	19 630	21 393	21 054	25 776	24 219	36 615	31 305
2905	acyclic alcohols	6 355	8 682	9 753	4 926	2 674	3 238	2 456	1 793	1 718	2 454	2 463	565	1 007	1 687	10 046	9 708	9 109	9 371
1209	seeds for sowing	2 295	2 813	3 639	4 439	4 736	5 546	8 705	5 852	4 113	3 919	2 508	3 702	4 566	5 230	3 557	4 547	2 517	4 236
2103	sausages	169	170	261	469	641	1003	724	1807	1628	635	1297	1065	1297	1356	1270	2895	11040	3775
2101	coffee extracts	0	0	47	44	0	0	1	2	1	3	0	0	0	0	3	2	290	1397
2106	food preparations NESOI	436	397	397	607	512	495	1534	865	923	694	861	1 022	1 563	2 018	1 641	1 646	1 826	1 330
2208	ethyl alcohol	0	0	186	2	2	0	2	9	19	7	279	253	875	183	53	51	154	1237
2823	titanium oxides	202	125	319	0	0	3	0	8	770	2 650	3 824	5 523	3 004	899	620	1 387	1 944	1 151
2002	tomatoes NESOI	0	0	0	0	7	0	0	0	0	0	221	0	0	0	0	0	0	1 055
1516	veg fats and oils	159	86	15	1	0	4	0	0	0	0	0	0	0	0	0	0	454	890
2309	animal feed preparations	341	679	167	1 372	989	43	59	134	236	323	252	120	252	252	103	485	152	857

Table 55: Changes in value of top ten products exported to Japan (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	1 115	701	817	838	1 050	1 657	1 249	1 069	1 144	1 576	1 109	1 091	1 435	1 260	1 476	1 336	1 433	3 426
1005	maize	474	171	99	1	142	398	69	30	0	98	1	0	0	0	166	116	0	1 927
0805	citrus fruit	23	58	47	128	84	106	202	207	276	373	263	306	306	219	235	285	266	304
1701	cane/beet sugar	205	132	246	191	188	318	253	196	207	305	290	231	324	369	266	139	118	231
2008	fruit and nuts	96	92	110	132	157	158	193	192	183	165	149	144	140	158	196	161	242	204
2009	fruit juice	51	31	49	72	109	130	121	106	131	255	153	157	223	186	164	196	219	193
2204	wine	9	23	41	30	32	29	43	33	29	34	29	55	50	82	81	61	115	132
2301	flour of meat	0	0	4	1	2	6	46	42	12	21	47	29	11	5	99	85	115	69
0802	nuts NESOI	0	1	0	0	0	11	31	18	13	38	28	20	19	29	40	49	68	59
1202	peanuts	34	39	40	41	45	44	53	60	41	53	43	39	99	46	61	67	77	51
1212	locust beans	3	4	2	5	5	6	7	9	14	10	10	15	119	16	19	25	37	50

Changes in the value and market composition of the top ten products exported to Japan

In 1996-7, the top five exports were maize (35.6% market share), cane or beet sugar, titanium oxides, fruits and nuts, and grain sorghum (see *Table 56*). In 2012-13, the top five were maize (39.7% market share), citrus fruit, cane or beet sugar, fruit and nuts, and fruit juice. In 1996, the market concentration of the top five products was 83.9%; by 2013 it was 83.5%.

Despite the apparent stability, the market underwent substantial shifts over the period. After 1996, the value of maize exports crashed and remained very low (except for a R398 million spike in 2001) until 2013, when it rose from R0.0 to R1.9 billion (see *Table 55*). For seven of the sixteen years between 1996 and 2013, value was R1 million or less. Citrus fruit rose to more than ten times its initial value, from R23 million to R304 million; between 2005 and 2006 it made up about a quarter of the total market, and from a 1996-7 market share of 4.5%, ended with an 11.7% market share. Cane or beet sugar, though unstable, maintained a strong position until 2010, with a market share above 18%. Between 2009 and 2012, its value fell from R369 million to R118 million, recovering somewhat to R231 million by 2013.

Table 56: Changes in market composition of top ten products exported to Japan (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1005	maize	35.6	6.1	19.9	4.3	3.6	0.0	0.0	10.0	39.7
0805	citrus fruit	4.5	10.6	7.0	17.6	23.9	25.9	19.5	18.5	11.7
1701	cane/beet sugar	18.6	26.5	18.7	19.4	18.8	23.6	25.7	14.4	7.2
2008	fruit & nuts	10.4	14.7	11.6	16.6	12.8	13.3	11.1	12.7	9.2
2009	fruit juice	4.5	7.4	8.8	9.8	14.2	14.1	15.2	12.8	8.5
2204	wine	1.7	4.3	2.3	3.3	2.3	3.8	4.9	5.0	5.1
2301	flour of meat	0.0	0.2	0.3	3.8	1.2	3.5	0.6	6.6	3.8
0802	nuts NESOI	0.1	0.0	0.4	2.1	1.9	2.1	1.8	3.1	2.6
1202	peanuts	4.0	4.9	3.3	4.8	3.5	3.8	5.4	4.5	2.6
1212	locust beans	0.4	0.4	0.4	0.7	0.9	1.1	5.0	1.6	1.8

4.9 Trends in the major agricultural products traded between South Africa and Mercosur

Changes in the value and market composition of the top ten products imported from Mercosur

Soybean oilcake was a major import from Mercosur throughout the period, growing to be the largest in terms of value from 2000 onwards, with market share of between 17.1% in 2006-7 and 32.4% in 2000-1 (see *Table 57*). The period saw a declining market share for soybean and sunflower-seed oils, as well as oilcake NESOI, though all three remained in the top ten most valuable imports in 2013. Cane or beet sugar, poultry meat, and wheat emerged as major imported products, having begun the period with market shares of below 2.0%.

In 1996, the top five imports by value were sunflower-seed oil, soybean oilcake, oilcake NESOI, soybean oil and tobacco. In 2013, the top five were soybean oilcake, cane or beet sugar, poultry meat, wheat and soybean oil. Six of the top ten in 1996 remained in the top ten in 2013, but three of the four new products in 2013 were situated in the top five (the fourth being fruit and nuts). Cane or beet sugar reached a value of R1 million for the first time in 2003, then rose at a staggering rate to R1.9 billion by 2013 (see *Table 59*). Poultry meat imports, which overall rose from R7 million to R1.8 billion, surged between 2003 (R285 million) and 2007 (R1.3 billion).

Wheat grew considerably over the period, but often experienced sudden dips in value — most recently in 2013, when it fell from R2.4 billion to R955 million.

Table 57: Changes in market composition of top ten products imported from Mercosur (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2304	soybean oilcake	20.9	24.1	32.4	28.1	20.7	17.1	25.7	31.0	26.8
1701	cane/ beet sugar	0.0	0.0	0.0	0.0	0.6	1.7	4.2	5.9	12.3
0207	poultry meat	1.5	1.9	5.3	8.8	15.8	15.6	13.7	18.8	15.2
1001	wheat	1.2	1.6	9.5	4.1	9.8	6.0	12.7	11.2	15.1
1507	soybean oil	3.6	6.8	7.2	15.9	15.3	15.5	15.7	7.4	4.0
1512	sunflower-seed oil	34.9	36.8	19.1	7.2	6.3	9.1	6.3	6.0	7.9
2009	fruit juice	4.1	0.8	0.1	0.7	1.0	2.1	1.8	1.7	2.9
2306	oilcake NESOI	5.4	2.3	2.2	0.7	0.5	0.9	0.9	1.4	2.3
2401	tobacco	3.7	5.7	3.6	4.3	5.6	2.4	4.9	4.2	2.4
2008	fruit & nuts	0.0	0.0	0.0	0.0	0.0	0.5	0.8	0.5	1.3

Changes in the value and market composition of the top ten products exported to Mercosur

In 1996 the top five exports were ethyl alcohol (HS code 2209, denatured), maize, beer, fruit and nuts, and wine. In 2013 the top five were acyclic alcohols, ethyl alcohol (HS code 2208, spirit beverage), grapes, wine and fruit juice. Four of the five top exports in 1996 were not in the top five in 2013, all but disappearing in the first half of the period.

Ethyl alcohol (HS code 2209), which held a 56.9% market share in 1996, saw value plummet from R275 million in 1997 to R18 million in 1998, and after 2001, it did not exceed R10 million (see *Tables 58 and 60*). Beer stayed below R1 million from 1999 onwards, fruit and nuts below R5 million from 2002 onwards, and from 2001 onwards maize — which, like ethyl alcohol (2209) crashed from R242 million to R18 million between 1997 and 1998 — did not exceed R10 million.

Growth in both acyclic alcohols and ethyl alcohol (2208) was unstable, but a long run trend of positive growth could nonetheless be discerned (from a 1.4% to a 27.5% market share, and a 0.9% to a 28.7% market share, respectively). The export value of acyclic alcohols rose from R46 million in 2012 to R119 million in 2013. Grapes and fruit juice both rose from below a 1% market share to levels of 9.5% and 7.8%, respectively. For grapes, a sharp upward shift in value occurred in 2012, when value rose from R4 million to R30 million. Most of the growth in fruit juice value occurred between 2008 and 2011.

Table 58: Changes in market composition of top ten products exported to Mercosur (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2905	acyclic alcohols	1.4	5.4	9.3	8.9	33.9	33.2	27.0	12.7	27.5
2208	ethyl alcohol	0.9	29.6	18.7	9.0	16.5	23.4	26.9	31.4	28.7
0806	grapes	0.0	0.9	0.4	0.2	0.1	0.6	2.1	3.2	9.5
2204	wine	3.4	3.7	1.3	1.8	8.1	6.9	8.1	9.7	8.4
2009	fruit juice	0.3	1.3	0.2	0.1	0.7	4.2	6.0	8.2	7.8
1209	seeds for sowing	0.8	3.7	3.0	1.3	4.2	2.2	3.9	3.4	4.8
1005	maize	32.5	1.3	1.7	1.4	2.0	2.5	3.0	18.0	1.6
1207	oil seeds	0.0	0.0	0.3	0.0	0.0	0.5	0.7	1.1	1.3
0505	bird skins	0.6	2.4	2.8	1.3	3.6	3.1	2.8	2.4	2.2

0511	animal products NESOI	0.1	1.2	1.2	1.8	4.5	1.9	2.9	1.3	1.1
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Table 59: Changes in value of top ten products imported from Mercosur (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	1 033	1 288	1 162	1 131	1 399	2 230	2 954	2 676	4 541	4 064	5 912	8 988	10 653	8 665	7 075	9 316	11 476	10 815
2304	soybean oilcake	261	224	255	296	451	724	921	659	1 023	756	1 069	1 475	2 520	2 437	2 473	2 606	2 808	3 171
1701	cane or beet sugar	0	0	0	0	0	0	0	1	10	41	42	212	417	403	276	689	883	1 850
0207	poultry meat	7	29	17	27	63	129	209	285	595	764	998	1 328	1 344	1 310	1 451	1 638	1 670	1 719
1001	wheat	0	28	18	18	130	214	171	57	424	421	418	476	1 948	502	273	1 558	2 403	955
1507	soybean oil	51	32	93	63	40	220	416	482	624	694	864	1 442	2 164	861	688	518	225	677
1512	sunflower-seed oil	310	500	454	388	298	393	202	203	393	149	481	881	451	762	582	400	1187	564
2009	fruit juice	47	48	17	1	0	2	1	40	21	67	109	197	221	125	62	222	372	265
2306	oilcake NESOI	59	66	26	28	48	33	37	1	38	5	34	107	57	111	106	131	267	252
2401	tobacco	49	36	76	54	52	78	115	127	322	161	201	155	210	734	375	315	314	216
2008	fruit and nuts	0	0	0	0	0	0	0	0	3	0	21	59	82	63	8	74	94	191

Table 60: Changes in value of top ten products exported to Mercosur (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	573	619	132	100	130	122	280	89	83	127	148	138	194	176	229	312	248	352
2905	acyclic alcohols	11	6	4	8	10	13	17	16	24	47	60	35	65	35	39	30	46	119
2208	ethyl alcohol	8	3	40	29	23	24	19	15	12	23	32	35	51	49	75	95	82	90
0806	grapes	0	0	2	0	0	1	1	0	0	0	0	2	3	5	14	4	30	27
2204	wine	13	27	8	1	2	1	3	4	8	8	7	12	13	17	30	22	25	26
2009	fruit juice	2	1	2	1	0	0	0	0	0	1	5	7	9	13	18	27	23	24
1209	seeds for sowing	1	8	4	4	4	4	3	2	4	5	4	3	5	10	10	9	13	16
1005	maize	140	247	2	0	1	3	4	1	3	2	2	5	5	7	9	88	0	9
1207	oil seeds	0	0	0	0	1	0	0	0	0	0	0	1	0	3	2	4	0	8
0505	bird skins	3	4	3	3	3	4	3	2	3	5	7	2	3	7	8	5	5	8
0511	animal products NESOI	1	0	0	3	3	0	3	4	4	5	1	4	2	8	6	1	2	4

4.10 Trends in the major agricultural products traded between South Africa and Russia

Changes in the value and market composition of the top ten products imported from Russia

The market for imports from Russia, like for Japan is relatively very small, so the figures for import value displayed in *Table 62* are measured in thousands rather than millions of Rand. The market is also extremely concentrated – in 1996, the top five imports made up 94.0% of the total market; in 2013 the top two products alone made up 99.6% (see *Table 61*). The top ten most valuable imports transformed radically — seven of the top ten products in 1996, including four of the top five, were not traded at all in 2013.

The top five products in 1996 were acyclic alcohols, fennel seeds, flour of meat, casein and ethyl alcohol. In 2013 the top five were wheat (with an 86.3% market share), cigarettes, leguminous vegetables, ethyl alcohol, and plants for pharmacy. Wheat was not traded, apart from during 2003, until 2011 when value shot to R233 million, and by 2013 had more than tripled to R693 million. Imports of cigarettes (which ended on R107 million) and leguminous vegetables (R2 million) did not exceed R1 million in value until 2011 and 2013, respectively. Acyclic alcohols, which had dominated the market during the first half of the period, dropped from a 42.8% market share in 2006 to a 1.3% share in 2007, and from 2008 onwards were not traded.

Table 61: Changes in market composition of top ten products imported from Russia (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
1001	wheat	0.0	0.0	0.0	55.4	0.0	0.0	0.0	70.0	87.7
2402	cigarettes	0.0	0.0	0.0	0.0	2.9	2.7	0.0	0.0	11.7
0713	leguminous vegetables	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.3
2208	ethyl alcohol	0.4	0.4	0.0	0.9	6.2	4.6	0.6	0.6	0.1
1211	plants for pharmacy	0.7	0.0	0.1	0.0	0.1	0.1	0.1	0.0	0.0
0106	live animals NESOI	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3301	essential oils resinoid	0.0	0.3	0.1	0.1	0.1	0.0	0.0	0.0	0.0
2106	food preparations NESOI	0.0	0.0	0.2	0.0	6.1	24.1	0.8	0.0	0.0
1302	vegetable extracts	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1209	seeds for sowing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Changes in the value and market composition of the top ten products exported to Russia

Fruit were a force in the export market to Russia. Five of the top ten exports with the highest value were fresh fruits, and a further four (wine, fruit and nuts, jams and fruit juice) featured fruit to some extent. In 1996, the top five most valuable exports were: cane or beet sugar; citrus fruit; chocolate; apples, pears and quinces; and food preparations NESOI. In 2013, the top five were: citrus fruit; wine; grapes; apples pears and quinces; and fruit and nuts.

Citrus fruit grew to dominate the market from 2001 onwards (when it grew from R26 million to R117m), and by 2013 had risen in value to R975m, with a 53.1% market share in 2012-13 (see *Table 63* and *64*). Apples, pear and quince values fell from R21 million in 1998 to R4 million in 1999, and market share fell from 19.6% to below 10% during the first half of the period. Growth then picked up, and the product group ended the period with a 13.2% market share (still well below the starting value). Wine export value grew fairly steadily from below R1 million in 1996 to R71 million in 2011, and then rose sharply to R254 million in 2013.

Table 62: Changes in value of top ten products imported from Russia (R thousands), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	4 825	21 575	7 222	4 692	5 791	16 308	16 975	42 587	14 216	12 140	20 836	99 78	16 724	20 0412	92 310	240 657	215 032	803 260
1001	wheat	0	0	0	0	0	0	0	32 983	0	0	0	0	0	0	0	233 222	200 127	693 190
2402	cigarettes	0	0	0	0	0	0	0	0	0	762	835	0	0	7	2	6	12 004	106 904
0713	leguminous vegetables	4	0	0	0	0	51	0	0	0	0	0	0	0	0	2	0	412	2 425
2208	ethyl alcohol	113	0	0	48	1	1	0	530	603	1 030	819	593	1 217	151	212	1 807	355	587
1211	plants for pharmacy	93	95	0	0	6	6	14	4	5	14	14	6	25	169	48	36	37	71
0106	live animals NESOI	0	48	11	17	3	7	0	0	0	3	8	0	2	0	12	0	14	68
3301	essential oils resinoid	0	0	22	11	3	8	37	1	19	0	3	11	5	30	36	7	133	10
2106	food preparations NESOI	0	0	0	0	0	45	0	0	0	1 595	3 757	3 658	1 801	3	94	1	6	3
1302	vegetable extracts	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
1209	seeds for sowing	0	0	0	0	0	0	0	0	0	0	0	0	56	0	0	0	0	1

Table 63: Changes in value of top ten products exported to Russia (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	110	60	241	179	48	186	227	411	342	258	483	620	1 003	983	1 226	1 261	1 359	1 884
0805	citrus fruit	22	26	24	24	26	117	157	225	211	158	274	387	509	521	799	836	748	975
2204	wine	0	1	1	1	4	2	6	7	12	16	30	44	114	55	56	71	164	254
0806	grapes	1	4	2	0	0	1	8	15	30	25	40	37	122	82	115	101	141	240
0808	apples, pears & quinces	14	19	21	4	8	7	19	36	44	21	47	69	182	158	145	159	192	235
2008	fruit & nuts	0	1	1	0	0	1	6	4	13	14	25	36	46	39	78	31	44	77
2007	jams	3	0	1	0	1	1	0	5	8	0	0	1	0	0	11	21	32	36
0809	apricots, cherries & peaches	0	0	0	0	0	0	0	1	0	0	0	0	0	0	3	5	5	21
2009	fruit juice	2	0	0	0	0	4	6	9	6	5	9	9	8	4	3	20	21	13
0804	dates, figs & pineapples	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9
0603	cut flowers	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1	3	3	5

Table 64: Changes in market composition of top ten products exported to Russia (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
0805	citrus fruit	28.5	11.6	61.6	59.9	61.5	60.0	51.9	65.8	53.1
2204	wine	1.1	0.3	2.9	2.0	4.6	6.7	8.6	5.1	12.9
0806	grapes	2.6	0.5	0.4	3.7	9.2	7.0	10.3	8.7	11.8
0808	apples, pears & quinces	19.6	5.8	6.2	8.7	10.9	10.5	17.2	12.2	13.2
2008	fruit & nuts	0.9	0.4	0.7	1.5	4.4	5.5	4.3	4.4	3.7
2007	jams	2.0	0.2	0.6	0.9	1.3	0.1	0.0	1.3	2.1
0809	apricots, cherries & peaches	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.3	0.8
2009	fruit juice	1.1	0.0	1.8	2.3	1.8	1.6	0.6	0.9	1.0
0804	dates, figs & pineapples	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
0603	cut flowers	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.2

4.11 Trends in the major agricultural products traded between South Africa and the USA

Changes in the value and market composition of the top ten products imported from the USA

In 1996, the top five imports from the USA were wheat, rice, maize, acyclic alcohols, and poultry meat. In 2013, the top five were food preparations NESOI, ethyl alcohol, wheat, sugars NESOI and nuts NESOI. The major shifts over the period, apart from the wide fluctuations in the value of wheat imports, included the rise of food preparations NESOI, ethyl alcohol, and sugars and dextrins, as well as the decline of rice and maize.

Wheat values were highly volatile, ranging from R29 million in 2001 and 2006 to R1.2 billion in 2011. From this peak, it fell to R87 million in 2012, and finished on R171 million in 2013, with a market share of 4.9% in 2012-13 (see *Table 65* and *66*). Rice declined steadily between 1996 and 2003 from R265 million to R115 million, and then crashed to R1 million in 2004. It did not recover, finishing the period on R25 million. Food preparations NESOI grew steadily to ten times its starting value, dominating the group from 2008 onwards. Ethyl alcohol began with a market share of 1.0%, and did not exceed R50 million in value until 2004, then grew rapidly from R45 million in 2003 to R220 million in 2007, after which growth slowed somewhat. It finished with a market share of 8.4% and an import value of R222 million. Poultry meat fell steadily over the first half of the period, from R73 million in 1996 to R4 million in 2004, and then rose over the second half to a final level of R126 million.

Table 65: Changes in market composition of top ten products imported from the USA (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2106	food preparations NESOI	3.6	7.1	9.7	7.1	8.5	10.0	11.6	9.4	12.2
2208	ethyl alcohol	1.0	1.7	3.0	3.2	10.6	11.8	9.9	7.4	8.4
1001	wheat	20.7	6.7	6.7	12.4	26.8	23.4	19.8	33.6	4.9
1702	sugars NESOI	0.7	0.9	0.6	1.2	2.6	4.1	2.9	4.4	6.0
0802	nuts NESOI	1.2	1.5	2.0	1.6	2.9	3.7	2.3	2.5	4.8
1209	seeds for sowing	2.0	2.7	3.5	2.7	2.8	2.6	2.8	2.1	4.2
1007	grain sorghum	0.0	0.2	0.1	2.1	0.6	1.7	0.3	0.0	2.4
0207	poultry meat	7.6	8.8	3.6	1.6	0.7	2.1	2.4	2.6	5.0
3505	dextrins	0.8	1.5	1.3	1.7	1.5	1.9	2.5	2.2	4.0
2309	animal feed preparations	4.4	5.6	3.7	4.0	6.1	4.1	3.3	2.2	3.4

Table 66: Changes in value of top ten products imported from the USA (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	1 378	1 165	1 052	1 044	1 190	808	1 521	1 243	1 429	1 357	1 245	2 341	2 681	1 508	2 006	3 102	2 337	2 906
2106	food preparations NESOI	34	57	77	72	97	96	109	86	111	124	162	197	254	232	238	243	285	355
2208	ethyl alcohol	11	14	13	23	21	39	43	45	116	179	202	220	215	200	157	221	218	222
1001	wheat	374	153	73	67	105	29	78	265	410	338	29	811	742	86	530	1 185	87	171
1702	sugars NESOI	9	9	9	9	4	8	13	21	37	36	49	99	76	45	82	142	157	157
0802	nuts NESOI	17	14	15	16	18	22	22	24	32	47	68	65	47	51	51	78	117	136
1209	seeds for sowing	24	26	28	28	32	38	39	36	41	38	43	49	61	56	52	53	87	135
1007	grain sorghum	0	0	0	4	3	0	29	30	14	3	29	32	12	0	0	0	0	127
0207	poultry meat	73	121	112	73	61	10	16	29	4	15	32	44	50	48	35	96	134	126
3505	dextrins	12	9	22	10	12	14	25	21	17	23	34	33	60	45	48	67	91	119
2309	animal feed preparations	41	72	60	56	36	39	47	62	79	91	84	65	67	71	54	58	68	108

Table 67: Changes in value of top ten products exported to USA (R millions), 1996-2013

HS product code	Description	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
	TOTAL	1 317	1 298	808	798	1 119	1 436	2 976	1 546	1 756	2 620	1 914	1 745	1 865	1 689	2 145	2 146	2 002	2 371
2204	wine	21	25	35	48	68	93	151	140	181	232	258	272	322	305	298	286	389	562
0802	nuts NESOI	9	9	15	36	45	69	63	81	59	133	85	75	84	119	198	216	316	386
0805	citrus fruit	0	1	2	13	34	64	80	156	171	196	292	195	264	244	309	259	293	293
2905	acyclic alcohols	6	8	8	18	15	24	34	47	38	126	116	153	203	127	156	164	156	185
2207	ethyl alcohol	1	4	27	8	78	121	121	86	110	151	210	188	188	181	131	157	145	165
2009	fruit juice	52	38	28	54	105	72	216	83	59	35	61	67	108	92	102	105	119	95
0806	grapes	13	43	67	81	77	70	59	28	25	20	40	51	35	22	72	8	24	83
1209	seeds for sowing	3	5	19	30	34	19	26	14	8	8	15	18	26	24	27	35	57	67
2103	sausages	0	1	0	2	1	2	3	9	1	2	1	10	13	10	16	29	44	66
2105	ice cream	0	0	0	0	0	3	3	8	11	16	39	55	51	72	57	45	46	47

Changes in the value and market composition of the top ten products exported to the USA

Titanium oxides, which initially dominated the market and which peaked at the same time as the overall export market (2002) at R1.6 billion, ultimately declined to below R1 million in 2013 (see *Table 67*). Wine, nuts and citrus fruit underwent radical growth and dominated the group by 2013. In 1996, the top five exports were: titanium oxides; cane or beet sugar; fruit juice; fruit and nuts; and apples, pears and quinces. In 2013, the top five were wine, nuts NESOI, citrus fruit, acyclic alcohols and ethyl alcohol.

All of the top five in 2013 began with a market share of below 2% (see *Table 68*). Wine steadily rose in value from R21 million to R562 million, and went from a 1.8% market share in 1996–7 to a 21.7% share in 2012–13. Nuts NESOI rose from R9 million in 1996 to R386 million in 2013, with most growth taking place since 2004. Citrus fruit, which began with an export value of below R1 million, peaked in 2010 at R309 million, after which value stagnated (finishing at R293 million). It is also worth noting that the USA was the only export destination for which ice cream was amongst the ten products with the highest value in 2013. Ethyl alcohol, the fifth most valuable export, was the second most valuable import.

Table 68: Changes in market composition of top ten products exported to the USA (%), 1996-2013

HS product code	Description	1996-7	1998-9	2000-1	2002-3	2004-5	2006-7	2008-9	2010-11	2012-13
2204	wine	1.8	5.2	6.3	6.4	9.4	14.5	17.7	13.6	21.7
0802	nuts NESOI	0.7	3.2	4.5	3.2	4.4	4.4	5.7	9.6	16.1
0805	citrus fruit	0.0	0.9	3.8	5.2	8.4	13.3	14.3	13.2	13.4
2905	acyclic alcohols	0.5	1.6	1.5	1.8	3.8	7.4	9.3	7.4	7.8
2207	ethyl alcohol	0.2	2.1	7.8	4.6	6.0	10.9	10.4	6.7	7.1
2009	fruit juice	3.5	5.1	7.0	6.6	2.2	3.5	5.6	4.8	4.9
0806	grapes	2.2	9.2	5.8	1.9	1.0	2.5	1.6	1.9	2.4
1209	seeds for sowing	0.3	3.0	2.1	0.9	0.4	0.9	1.4	1.4	2.8
2103	sauces	0.0	0.1	0.1	0.3	0.1	0.3	0.6	1.0	2.5
2105	ice cream	0.0	0.0	0.1	0.3	0.6	2.6	3.5	2.4	2.1

5. CONCLUSION

The EU remained the dominant source of imports and the dominant destination for exports throughout the period. The import market shifted dramatically away from the US and Africa toward Brazil and China. In the export market, the presence of the USA, Japan and MERCUSOR receded whilst Africa and China underwent strong growth. The top two export destinations, the EU and Africa, dominated the market by a significant margin, accounting for well over half of total export value throughout. Rice and wheat were the dominant products within the import market throughout the period, whilst the position of poultry meat strengthened and sunflower-seed oil receded. In poultry meat imports, the USA saw sharp decline, whilst South America and the EU underwent a very strong rise. The major shifts in the export market were away from sugar and titanium oxide, and towards fresh fruit and wine.

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