



Quarterly Trade Brief

2025 Q2

This publication provides a quarterly synopsis of trade-related matters in the South African agricultural sector



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INSIGHT

South Africa's total trade position remained almost unchanged, while agricultural trade continued to grow in the second quarter of 2025 (2025Q2).

Total South African trade

South Africa's net trade position remained positive in the second quarter of 2025, despite a marginal (-1%) decrease in exports. Total exports have remained at around R500 billion since the second quarter of 2021, indicating long-term stagnation. Therefore, the declining imports sustain the net trade position for 2025Q2.

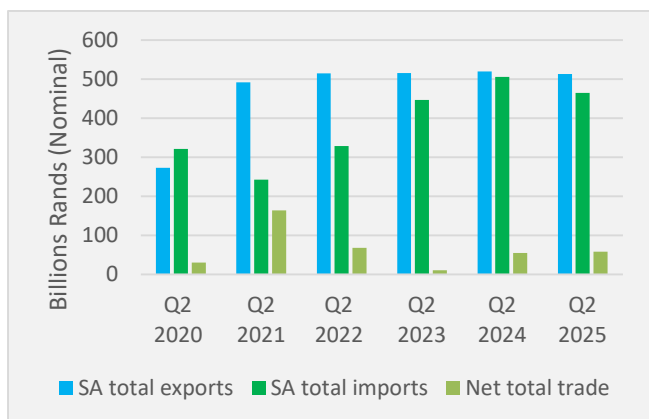


Figure 1: South Africa's total trade in quarter 2 (2020 – 2025).

Source: ITC, 2025

Trade of the South African agricultural sector

In contrast to the overall South African trade, agricultural exports¹ increased by 8% in the second quarter of 2025 compared to 2024. Agricultural exports reached a value of R71.5bn in the second quarter, marking a 60% increase compared to 2020 levels and a 91% increase compared to 2019 (Figure 2).

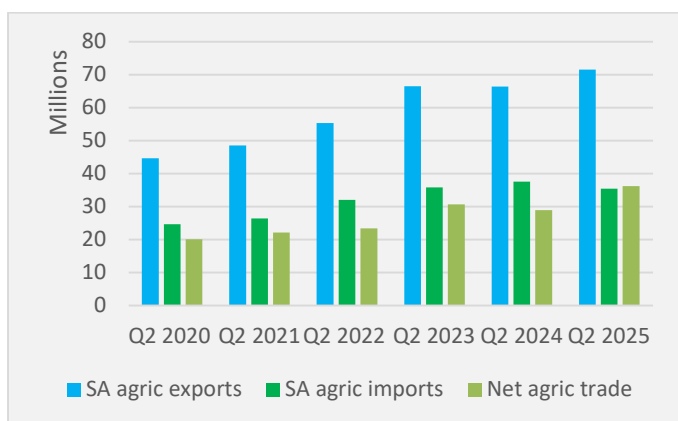


Figure 2: South Africa's 2020Q2 - 2025Q2 agricultural trade

Source: ITC, 2025

¹ Agricultural products are defined in terms of the Harmonised System (HS) product classification at the 2-digit level including, HS01-HS24, HS41-HS43 and HS50-HS52.

The sector maintained its trade surplus position, with agricultural imports declining by 6% compared to the second quarter of 2024. This marks the first decline in second-quarter imports in five years. The net trade position for the sector is strengthened from both the export and import sides.

Agricultural trade with selected regional partners

The SADC region is the primary market for most of South Africa's agricultural exports (35%). In contrast, exports to the USA and the EU experienced the most significant increase in value in the past quarter, showing growth of 19% and 18%, respectively.

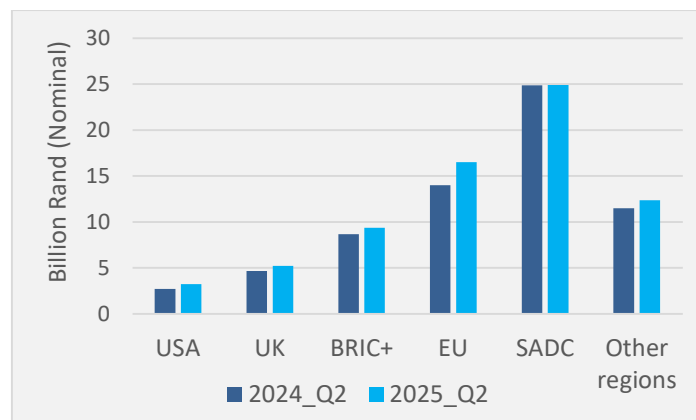


Figure 3: South Africa's agricultural exports to selected partners (R71bn)

Source: ITC, 2025

*BRIC+ refers to Brazil, Russia, India, China, Egypt, Ethiopia, Iran and the United Arab Emirates.

Imports from the BRIC+ region showed the most significant decline (-26%) in the second quarter of 2025 compared to the same period in 2024, followed by imports from the UK (-17%) and the EU (-16%). "Other regions" (Asia outside China and India, the Middle East, etc.) showed a substantial (+12%) import increase between the two quarters, followed by imports from the USA (10%) (see Figure 4).

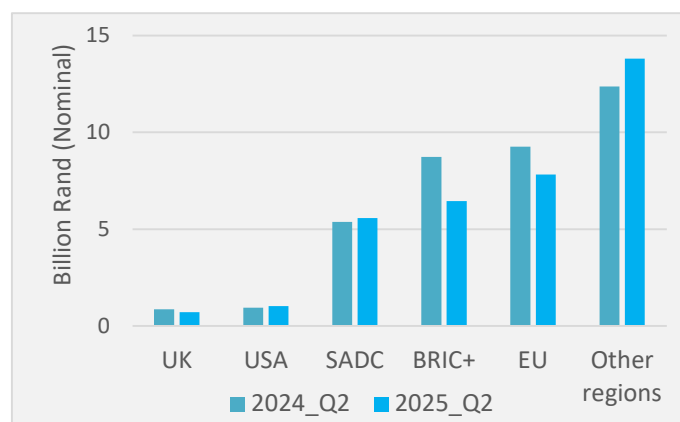


Figure 4: South Africa's second quarter agricultural imports from selected partners (R35 Billion)

Source: ITC, 2025

South African Exports to the USA

The announced tariff increases of between 10% and 50% by the US on at least 50 of its trade partners in April 2025 signalled intense uncertainty and turbulence in global trade and international markets. South Africa was hit with a 30% tariff increase, which also means that preferential market access under the African Growth and Opportunity Act (AGOA) is lost. The tariff increase was announced in April, subsequently paused for 90 days at a level of 10% and the 30% level will take effect from August (outside the second quarter period); however, the sentiment surrounding its impact is worth considering, given the changing trade, diplomatic, and foreign relations between the two countries.

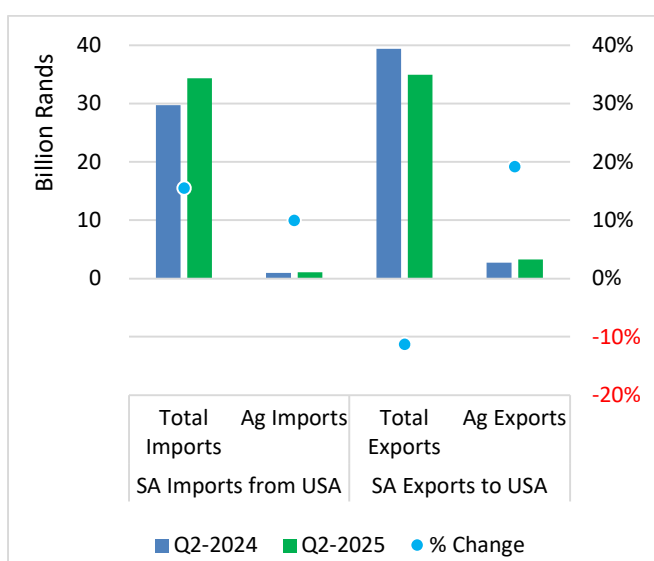


Figure 5: South African trade with the USA by share and value, 2024Q2 – 2025Q2

Source: ITC, 2025

Total imports from the US, which account for 3% of South Africa’s total imports, increased between the second quarters of 2024 and 2025. South Africa’s exports to the USA, which accounted for 9% of the total, declined by 11%. Agricultural exports increased by 19% as frontloading, especially for citrus fruit and fruit juices, preceded the tariff shock. The effect of US tariffs in the future will be interesting to observe, as a 30% duty kicks in for South African citrus and table grapes, compared to 10% for those originating from South American countries like Peru, Chile, and Uruguay. In the case of fruit juice, Brazil was able to negotiate an exemption on orange juice, while other products will face the full brunt of the tariff. The next quarter’s trade performance is likely to show some signs of these impacts from tariffs, as it will include the period outside the 90-day pause. During this period, the third quarter, South Africa’s citrus exports typically reach their peak, with other products, such as fruit juices, macadamias, and table grapes, also increasing their volumes.

Disaggregated agricultural commodity trade performance by value and growth

Nearly 80% of South Africa’s total agricultural exports by value are contributed by its top ten product categories, at the HS 2-digit level. Fruit such as citrus and apples made up almost two-fifths (38%) of sectoral exports in the second quarter. The category of fruit and nuts also realised a 21% increase compared to the same quarter in the previous year.

Beverages, including wines, ethanol, and sweetened waters, were the second-largest export group. The growth, however, was around 4% compared to the second quarter of 2024. Cereals were the third largest group and decreased by almost 11%. The decline in exports may be viewed as an adjustment from the high 2024 maize exports, resulting from the drought that year. From cereals, maize exports were the most dominant, with the majority destined for Zimbabwe.

Exports of sugar products experienced the most significant decline (nearly 33%) when compared with the same quarter last year. In volume terms, exports declined from at least 250,000 tons to less than 160,000 tons. More than half of this decline was attributed to a decrease in exports to Mozambique, which fell by over 20,000 tons, from 27,000 tons to around 7,000 tons. South Africa’s 2024 sugar crop was the lowest in eight seasons, contributing to the reduction in trade volumes.

Meat exports are not among the top exported products, and this is primarily attributed to increasing disease outbreaks, mainly foot-and-mouth disease (FMD). During this period, China, which is the largest market for beef, imposed a ban on exports due to FMD. This is despite the two countries signing a Memorandum of Understanding (MoU) in 2024. The MoU allows beef exports from FMD-free zones. Furthermore, the previous bans from the neighbouring SADC partners of Botswana, Namibia and Zimbabwe remained in place.

The leading import product category is cereals, which declined by 26% in the second quarter due to a decrease in imports of wheat and rice. The two products accounted for about one-fifth of agricultural imports. There was a notable 40% drop in meat imports, mainly poultry, following the temporary ban on poultry imports from Brazil due to an avian influenza outbreak in May.

Although imports of sugary products and cocoa saw a significant increase in the second quarter of 2025, their contribution to total imports was insufficient to offset the overall decline in agricultural imports. Sugar imports are primarily sourced from Eswatini, which accounted for half of the imports in 2025 Q2. The imports are facilitated under the SACU common external tariff, as well as the SADC Free Trade Area.

Table 1: Value and growth of the top 10 South African agricultural trade commodities: 2024Q2 vs. 2025Q2

Trade flow	Products	Q2 2024 (Billion Rands)	Q2 2025 (Billion Rands)	Percentage Change
Exports	Fruit & nuts	22,16	26,84	21.08%
	Beverages (Wine & ethanol)	6,72	6,96	3.50%
	Cereals (maize)	4,96	4,43	-10.86%
	Processed fruit & veg.	3,69	4,33	17.26%
	Miscellaneous	2,99	3,33	11.66%
	Fish products	2,67	2,65	-0.95%
	Residues	2,21	2,14	-3.20%
	Food preparations	1,74	2,05	17.69%
	Animals & veg oils	2,32	2,03	-12.52%
	Sugar products	3,00	2,01	-32.92%
Imports	Cereals (wheat & rice)	7,94	5,88	-25.99%
	Animal & veg oils.	3,27	3,41	4.45%
	Beverages (Water & beers)	3,14	3,02	-4.08%
	Sugar products	1,84	2,99	62.03%
	Miscellaneous	1,91	2,22	16.11%
	Residues	1,55	1,45	-6.07%
	Cocoa	0,80	1,42	77.52%
	Coffee	1,19	1,38	15.34%
	Food preparations	1,47	1,35	-8.45%
	Meat products (poultry)	2,18	1,30	-40.20%

Source: ITC, 2025

IN CONCLUSION

This trade brief reviews South Africa’s agricultural trade performance for the second quarter of 2025. It highlights the long-term stagnation of total exports, the potential loss of market access and competitiveness in strategic destinations amid global trade uncertainty, as well as the resilience of agricultural exports. The sectoral trade surplus remained healthy in 2025Q2 as imports declined during the period. The meat trade is affected by the long-standing biosecurity challenges and global diseases. Future supply to the US market remains in question as tariff reform in that country reduces South Africa’s competitiveness and favours other suppliers, such as Chile, Peru, and Uruguay. The regional outlook remains optimistic despite the ban on the beef trade due to FMD outbreaks. SADC remains the most significant market, and intra-regional trade during the quarter improved in both exports and imports, with strong participation from countries such as Eswatini, Mozambique, and Zimbabwe.

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