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Loal elections: ‘Tipping point’ for South Africa

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Hortgro: South Africa Political and Economic Overview

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THE GREAT DISRUPTION.

- New World – Reshaped global institutions, trade rules, traditional country partnerships;
- UN, WTO, global institutions disrupted;
- US Trump 'America First', development aid cuts;
- Global economy disruption: tech companies, AI, merging human and technology worlds;
- Disruption: critical resources underpinning tech-driven economy;
- US/Israel war with Iran – disrupt Middle East economies, global supply chains;
- Iran war pushes renewable energy transition;
- Rise of mini + regional trade conflicts;
- China state-subsidised manufacturing disrupts;
- China's coming agriculture disruption; economies;
- Rising climate disruption.

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GLOBAL DISRUPTION.

- Country trade agreements based on economic interests;
- Rise of country-to-country partnerships;
- Trump disrupt established global trade blocs: BRICS, NATO, EU;

AFRICA DISRUPTION.

- US trade tariffs, development aid cuts impact;
- Africa unstable – violent, corrupt military rule, liberation parties;
- Rise of fundamentalism;
- AU, African regional institutions battling;
- Africa free trade deal ineffective.

South Africa: **PHALA PHALA DISRUPTION.**

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ANC Disruption:
Ramaphosa **Impeachment**;
Could have criminal proceedings against Ramaphosa;
Possible neutral ANC successor.

GNU Disruption:
Could be end of current GNU;
Possible ANC-EFF-MK realignment.

Local Election Disruption:
ANC fall to 30% floor;
Johannesburg 17% of SA GDP – could be DA;
PA, EFF, MK rise.

ANC Decline Disruption:
Rise of Extra-Parliamentary politics;
Ramaphosa essentially lame-duck.

ANC and Cosatu experience another breakaway: **SACP, backed by NUM, standalone** in 2026 local elections

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State, Democracy, Economy Challenges.

01 Impeachment may undermine institutions – SARS, Reserve Bank;

02 60% Youth unemployment electoral, democracy, economy risk;

03 Public education system decline – in world where technology critical;

04 ANC anti-business ideology across society;

05 Must do state efficiency reforms without cutting jobs;

06 Corruption has become everyday;

07 US targeted sanctions against ANC leaders likely, including Ramaphosa, could destabilise SA;

08 ANC could integrate SA economy with China or with rogue states – disastrous.

SA RISKS

1. Ramaphosa exits, anti-GNU ANC successor partner with EFF/MK; DA refuses to get black leader.
2. SA aligns itself to one big power, China – and not diversify partnerships.
3. BRICS partners – competitors to SA in alternative US markets.
4. ANC may become more populist in economic crisis: expropriation, more anti-business.
5. Risk of GNU not reasonably delivering – can strengthen left populist electoral parties.

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SA's **OPPORTUNITIES.**

Strong civil society + business.

Critical Minerals + Renewable Energy Opportunities.

Still strong institutions – that survived state capture.

Strong judiciary.

Diversity of South Africa + Diversity, Coalition Politics.

Manufacturing and infrastructure ecosystems not entirely eroded.