HORTGRO
Growing Fruit IQ

Technical Symposium 2026

A time of choices – Developments in South Africa's trade landscape

Wolfe Braude | AgBiz

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Wolfe Braude – Manager: Agbiz Fruit

Hortgro Technical Symposium

25 May 2026

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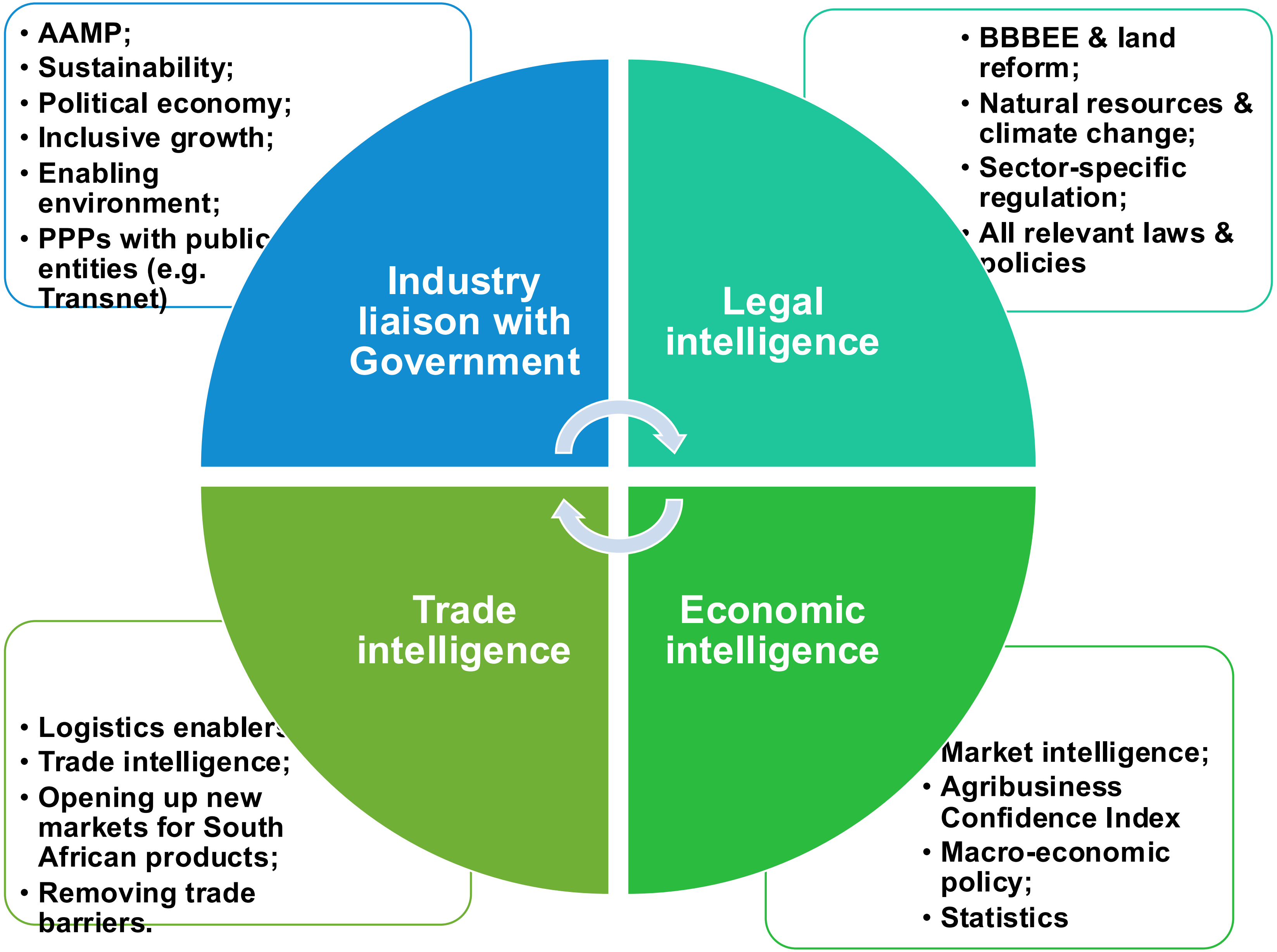
Who we are

- Established 1947 as the Cooperatives Council
- **Apex body representing approximately 80 companies & 20 industry associations in the agricultural value chain**
- Mandate to represent industry & advocate for an enabling environment
- Promote agribusinesses in South Africa and abroad
- Grain & Fruit Desks.



Agbiz Members

Finance

Agribusinesses / Co-ops

KOUP PRODUSENTE KOOP BPK

SUTHERLANDSE LANDBOUKOOP BPK

Mechanisation

Inputs

Commodities & Producers

Agro processing

Marketing

Service providers

What is the Agbiz Fruit Desk?

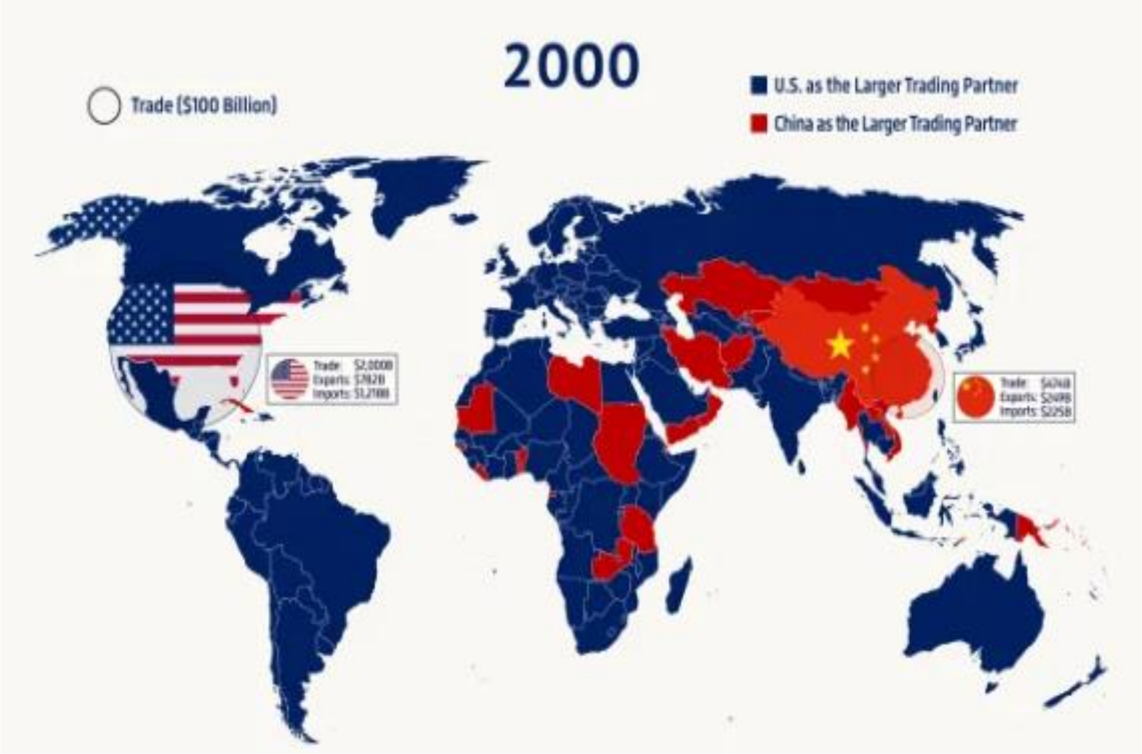
- **Dedicated policy resource embedded in Agbiz, supports fruit sector and Agbiz capacity.**
- **Steering Committee made up of the members of FruitSA.**
- **Funded by FruitSA members (Hortgro, CGA, SATI< BerriesZA, Subtrop, FPEF)**
- A channel for articulating & actioning policy needs of the SA fruit industry, within broader agricultural policy landscape, and the policy work of Agbiz;
- Core actions: policy & advocacy; developing a trade enabling environment, research

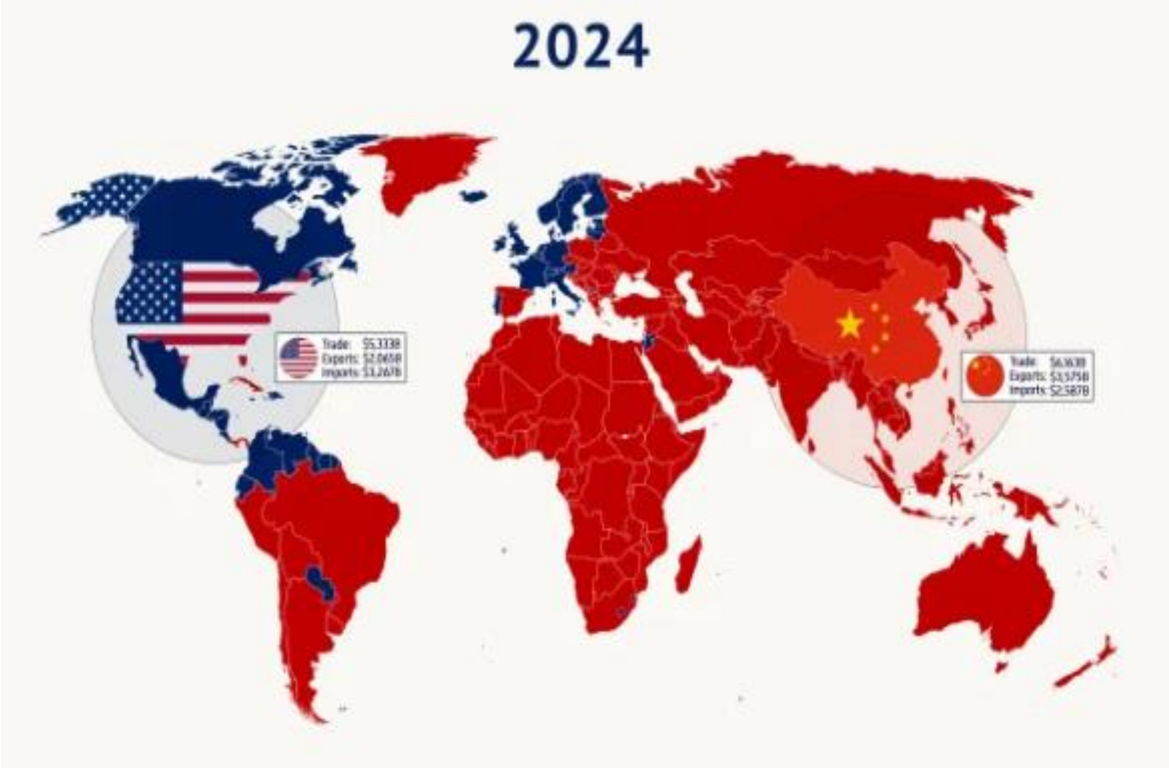
Comparative Export Values - 2024

- **Total SA agri exports 2024 ($13.7bln) were:**
  - nearly 2 x iron ore export value,
  - Nearly 3 x chromium ore, 2.6 x ferrochrome export value
  - 2.7 x SA's iron & steel exports value
  - 1.7 x SA's machinery (HS84 & HS85) exports value
  - Slightly larger than autos & auto components export value
- Fruit sector exports alone = close to SA's ferrochrome exports, larger than manganese exports.

A time of change

China vs US as largest trade partner for global markets, 2000 vs 2024

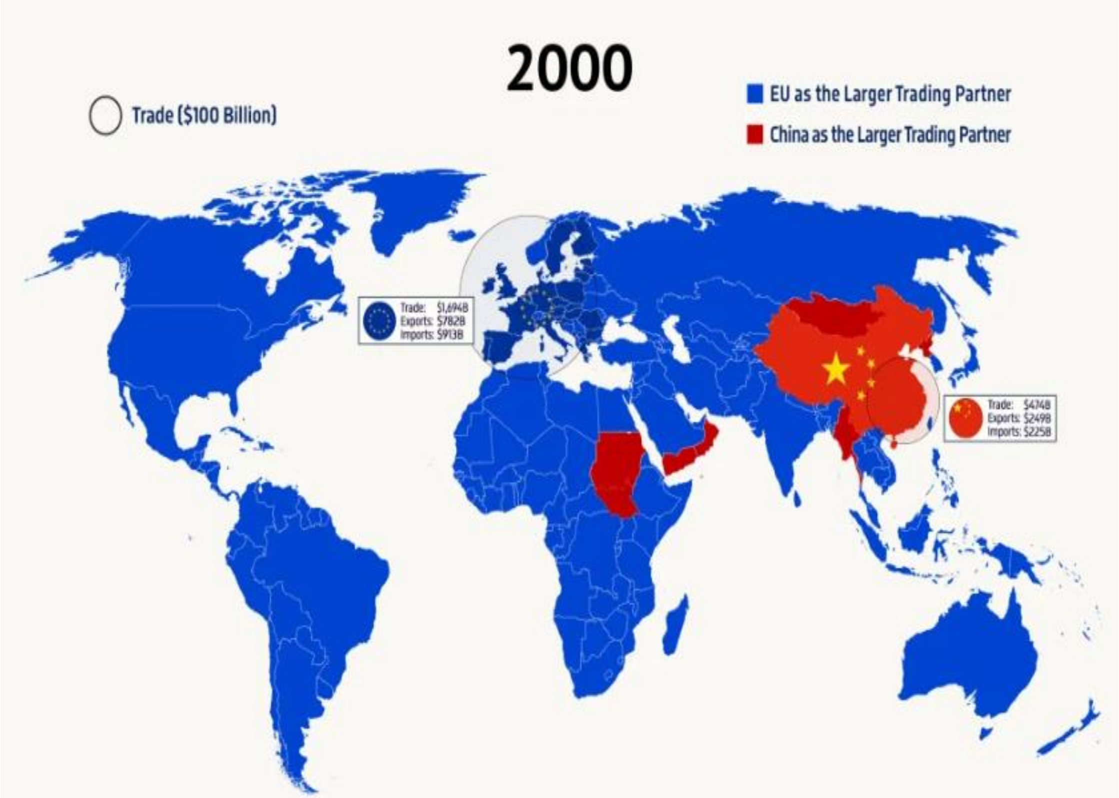


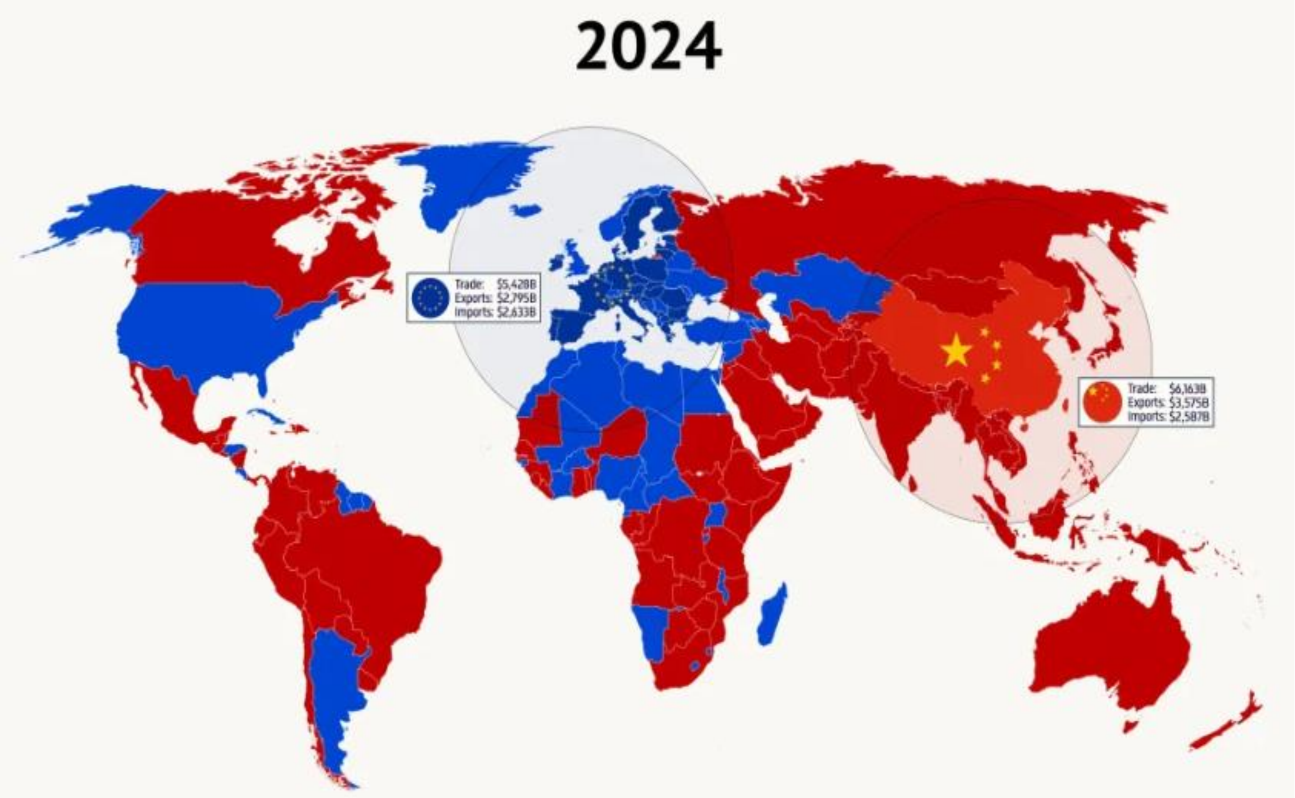


China is now the dominant trade partner for most of Asia, Eastern Europe, the Middle East, Oceania, South America, and Africa, with a total of US$6.2tn worth of trade vs US's S$5.3tn

Source: https://www.voronoiapp.com/

EU vs China as largest trade partner for global markets, 2000 vs 2024

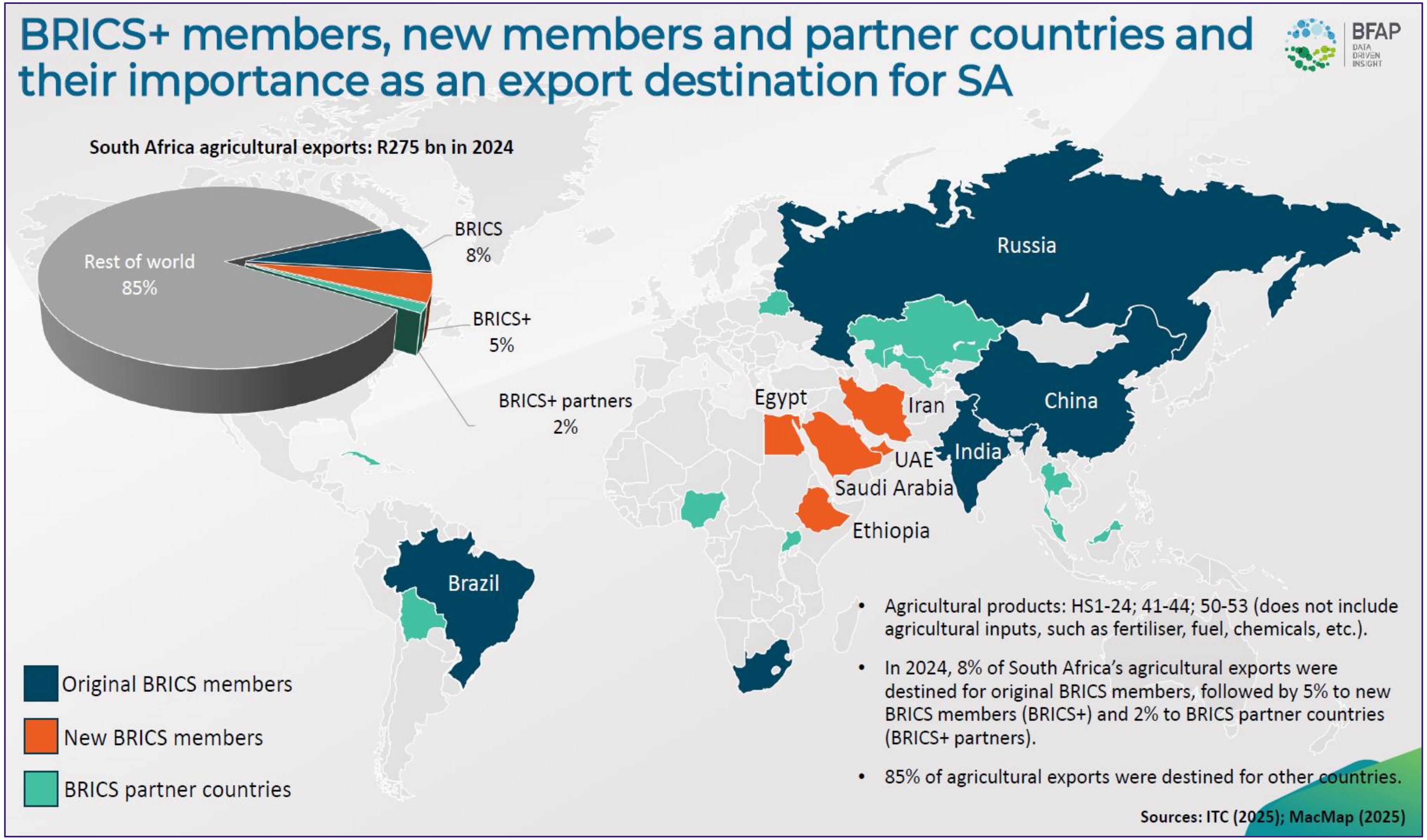




From 2000 to 2024, EU total goods trade (exports + imports) grew from $1.69 trillion to $5.43 trillion (4.1% CAGR) and from $4.74 billion to $6.16 trillion for China (11.3% CAGR).

Source: https://www.voronoiapp.com/

SA total trade with BRICS cluster - 2025



BRICS founders: 8%

BRICS+: 3%

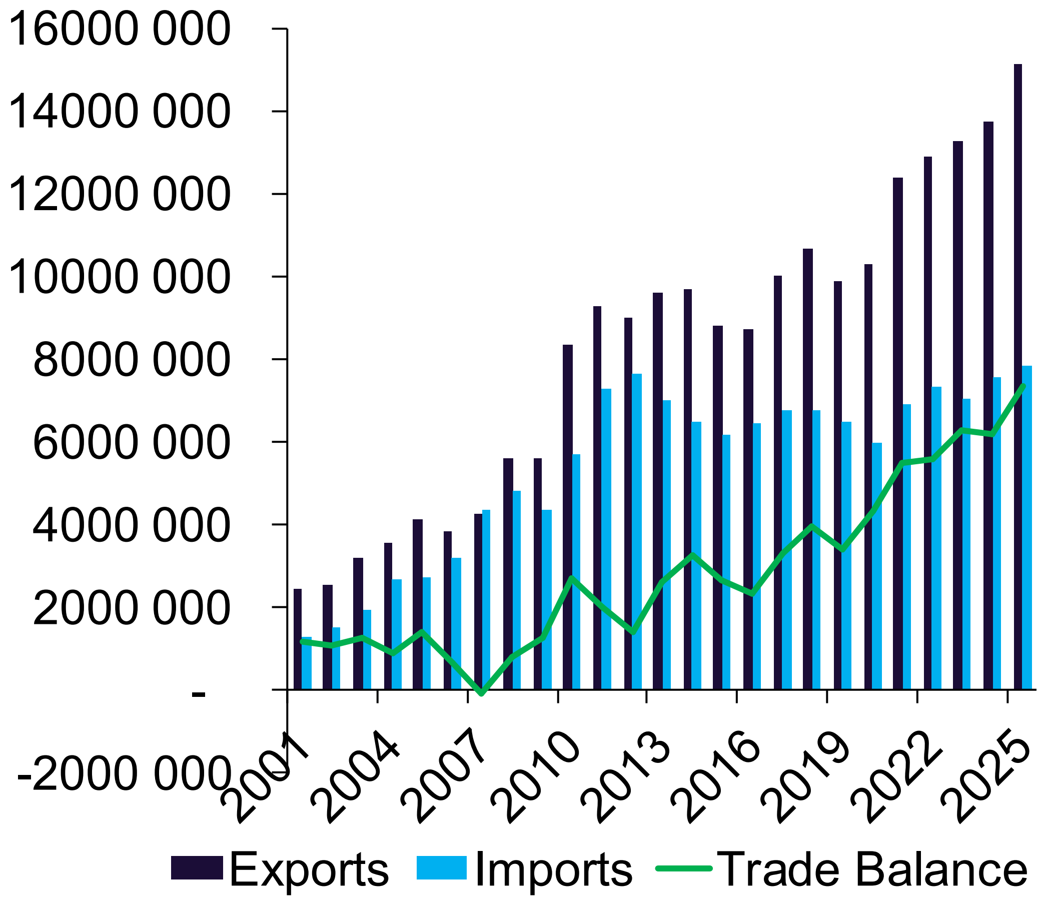
BRICS+ partners: 2%
= 13% share of SA trade

BRICS+
Egypt, Ethiopia, UAE, Iran, Indonesia

Partners
Belarus, Bolivia, Kazakhstan, Cuba, Malaysia, Thailand, Uganda, Uzbekistan
Nigeria

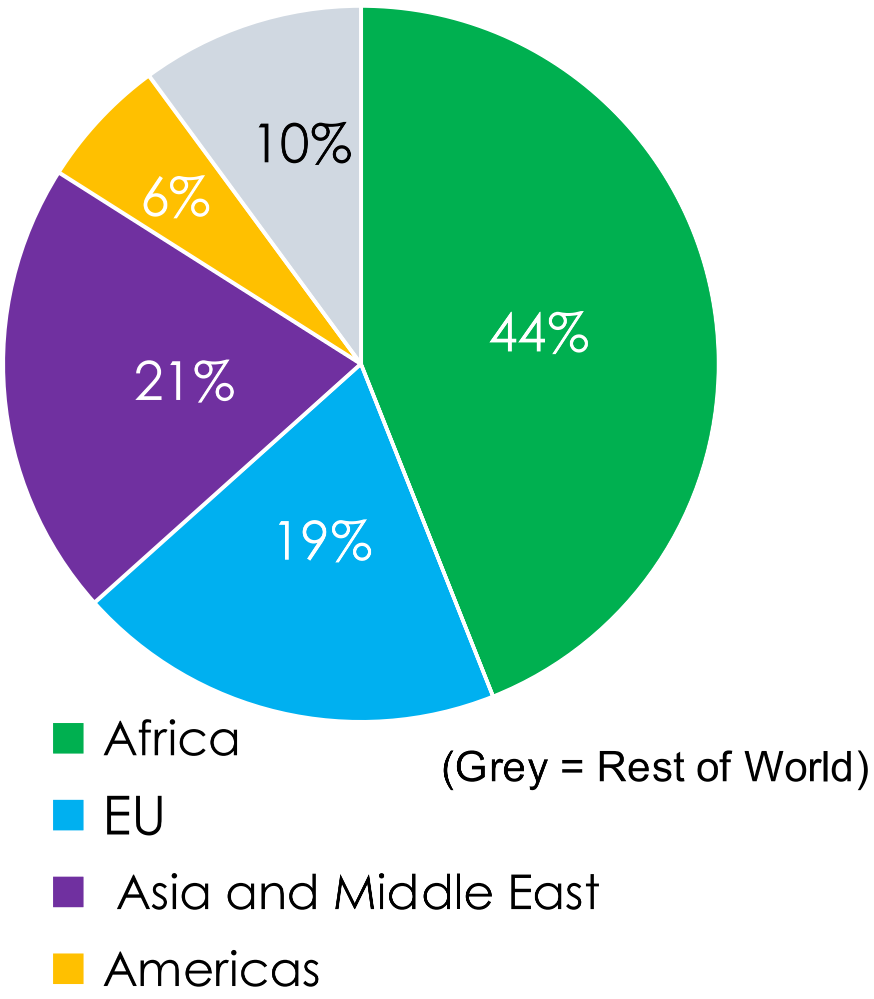
Unlocking new markets fundamental to ensure continuous export growth

SA's agriculture exports in 2025, USD



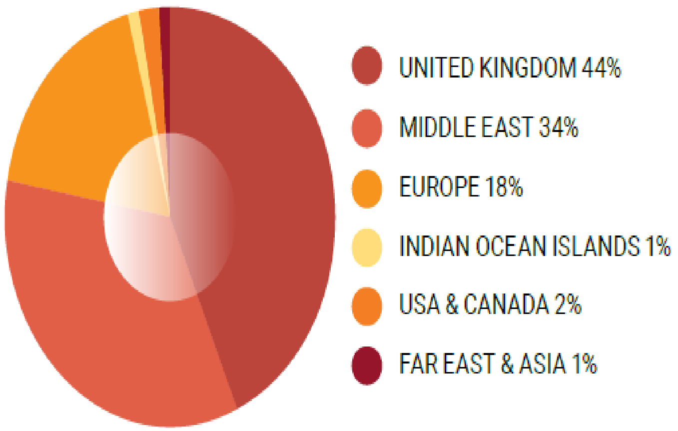
Source: Trade Map and Agbiz Research

SA's agriculture exports by region in 2025

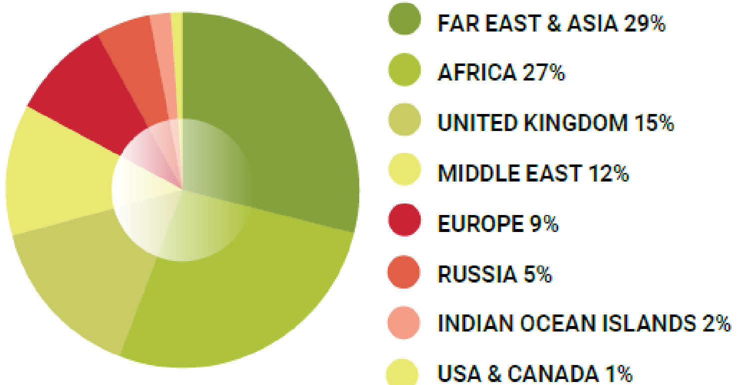


Deciduous markets by region 2025 (22% of total SA fruit exported)

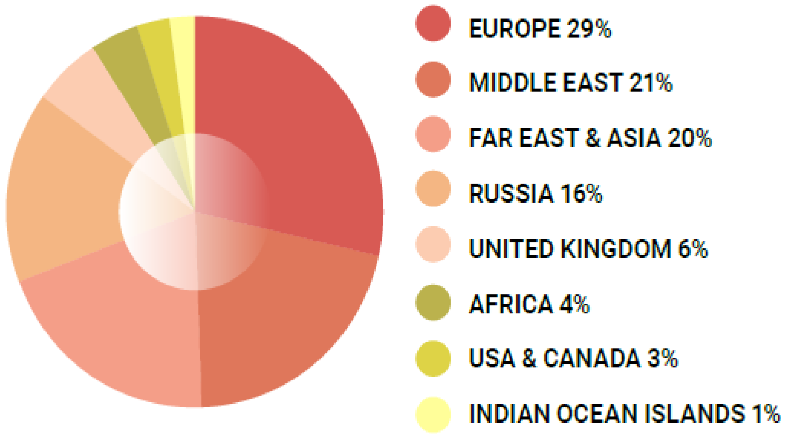
PEACHES EXPORTED PER MARKET 2024/2025



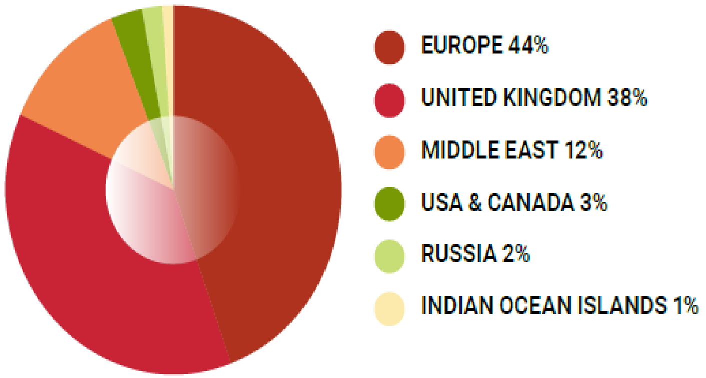
APPLES EXPORTED PER MARKET 2025



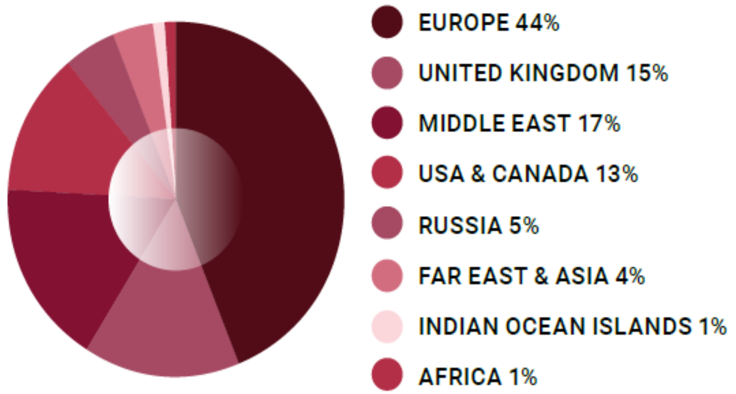
PEARS EXPORTED PER MARKET 2025



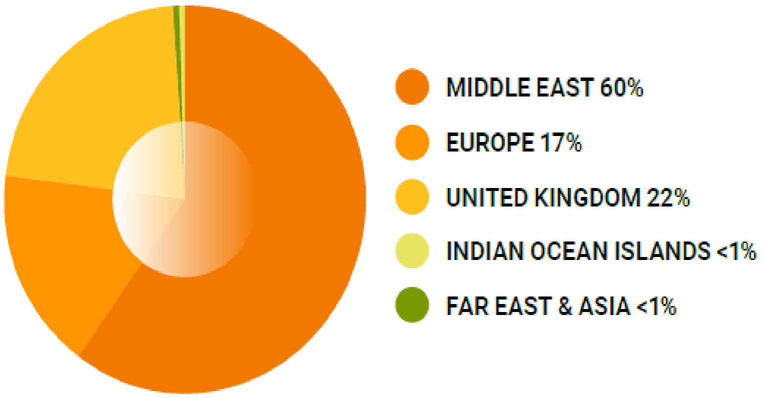
NECTARINES EXPORTED PER MARKET 2024/2025



PLUMS EXPORTED PER MARKET 2024/2025



APRICOTS EXPORTED PER MARKET 2024/2025



Source: FPEF

Commodity trade highlights – 2025 (TradeMap)

Fruit comprises around 35% of SA's agricultural exports. Top products include citrus, grapes, apples, pears and avocados.

- **World's 11th largest peaches (incl nectarines) exporter**
- **9th largest apricots exporter**
- **4th largest pear exporter**
- **5th largest apple exporter,**
- **4th largest plums & sloes exporter**

Other Commodities

- **Worlds largest macadamia nut producer & exporter**
- **World largest Maize meal exporter**
- **6th Largest prepared/preserved apricot exporter**
- **5th largest prepared / preserved peaches exporter**
- **4th largest prepared / served pear exporter**

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- Fruit sector exports alone = close to SA's ferrochrome exports, larger than manganese exports.
- 2025 – Fresh & dried deciduous fruit = 70% of SA' diamond exports

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Emerging diversification: US / China / India / AfCFTA / BRICS+ / New partners

Unilateral trade liberalisation & trade re-orientation

- **America First** / MAGA doctrine: most profound re-ordering of global trade since creation of WTO. But **unilateral**, not multilateral. Outside of WTO
- **US pursuing both unilateral market access and tariff revenue**
- America First trade deals generating trade deflection – i.e. waves of ex-US bound exports in possible search of backup markets
- Significant damage to standing of WTO rules/commitments and efforts to reform WTO if it becomes entrenched

Resulting revision of SA's Trade & Economic Policy Strategies

- Recalibration of SA trade policy. Via NEDLAC. Agbiz sits on NEDLAC trade Committee & EconPol Committee. New trade strategy seeks new markets
- Economic Diplomacy to encompass trade and International Relations.
- Agbiz CEO is current Convenor of NEDLAC Trade & Industry Chamber.

The MFN lose-lose flaw in the new deals?

- US deals are not yet FTAs or PTAs.
- Any tariff concessions may need to be MFN reductions?
- All WTO members will then benefit.

SA's push for diversification

DTIC's push for diversification

1. **Revisit existing agreements**
   - SACU, EFTA, MERCOSUR, UK EPA, EU EPA
2. **Push for agreements with new partners**
   - India, China, S Korea? Singapore? UAE? GSP access for wine to Japan? Canada?
3. **Trade missions by dtic/DoA**

   2025: Japan, Saudi Arabia, India, Switzerland, Indonesia, Vietnam, Malaysia, Turkey
4. **Finalise AfCFTA negotiations, accelerate implementation.**

   Agbiz to sit on National Implementation Committee
5. **Proposed by Agbiz & BUSA – need to recapitalise state's 'trade machinery':**

   E.g.Expand negotiations, trade promotion, and trade facilitation units, embassies, plant & animal health SPS staff, accelerate tariff processes via ITAC.

- **Significant potential export opportunities:**
  - **China** – SA supplies only 0,5% of agri import market of over $200bln
  - **Saudi Arabia** - SA supplies less than 1% of agri import market of $30bln
  - **UAE** - SA supplies 2% of agri import market of $23bln
  - **Vietnam** - SA supplies less than 0.3% of agri import market of $32bln

Why is SA pushing for trade agreements?

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Why push for trade agreements?

- None signed in ME & Asia – CAEPA with Chian is first one – still being negotiated.
- Most of SA's competitors have PTAs ofr FTAs
- SPS Protocols can take years f(over a decade) or a single commodity
- SPS Protocols are only a single commodity at a time
- SPS Protocols usually use a queue system

☹

Agbiz trade sectoral arrangement initiative

Agri Value Chain Preferential Trade Agreements Study

- **Agbiz Fruit** proposed: Agricultural Sector Value Chain specific, sectoral agreements with selected trading partners as an alternative pathway
- Avoids deadlocks and risks for textiles, manufacturing and other sensitive sectors
- **Dtic supports expressed for concept of sectoral trade agreements as proposed by Agbiz**
- ‘Proof of concept’ – Research to model effects of such an arrangement with high agri tariff / high manufacturing risk markets such as China, India, S Korea, Vietnam, Thailand
- STATUS: study underway, Final Report due July 2026

Status of SA's trade negotiations

China

India

USA

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South Africa – China Trade Arrangements

- **Early Harvest Agreement** offer made to a number of non-LDC African countries, including SA, under the China-Africa EPA. To accelerate market access while negotiations occur under the CAEPA Trade Module. SACU & China negotiating erms of annual tariff phase downs, as well as other implementation elements such as Rules of Origin.
- **Agri products and processed such as juices are automatically regarded as RoO compliant**
- Agbiz and the DoA's Agricultural Trade Forum have been working via BUSA and NEDLAC to provide inputs to processes as required, and share info with Members.

2nd track - 1st May unilateral offer to all African countries (excl eSwatini)

- **SA & China govts confirm SA exporters have immediate 100% tariff free access from 1 May, but the implementation connection between Early Harvest and the 1st May offer to Africa remain under discussion.**
- **It is a parallel, unilateral market access track, valid for only 2 years. Gives SA two years to** land trade deal.
- Interim customs arrangmements now finalised – Agbiz & FPEF transmitted relevant issues

South Africa – China Framework Agreement (CAEPA)

Key issues

- Focus now on ‘Early Harvest Agreement’ & exchanges of tariff offers. Four Modules: **Trade**, Inclusive Growth, Supply Chains, and Modernised Development (digital trade).
- Must have reciprocity to be WTO compliant – no free lunch.
- However, need not be fully reciprocal, i.e. SACU must offer tariff reduction but need not be equal to China’s; this is allowed under WTO due to differences in development
- Exact conclusion timeline uncertain, possibly mid to late 2026, active negotiations underway
- Risks to other SA sectors higher than for agriculture.
- Comparted to absence of market access to China in previous years, this is significant development for SA agricultural sector

South Africa – India PTA

- Revival & reset of PTA negotiations that started 2008
- 95% of trade between SACU and India is between South Africa and India
- Draft ToR for negotiations being negotiated. Precursor to possible actual negotiations.
- India would like to negotiate comprehensive access, i.e. a full PTA.
- Agri sector believes an agri sectoral agreement may be a compromise and pragmatic starting point, with sensitive sectors excluded for now.
- Will be necessary to address any risk of customs circumvention, as with China.
- ToR may be signed on margins of Africa-India Summit. (June /July 2026?)

SA agri exports to India (2025): $178 million.

Indian agri imports from world (2025): $41 billion.

US trade matters

Timeline of events

30% tariffs on SA goods
- 9 Aug 2025

Certain agri products excluded
- 14 Nov 2025

AGOA extended until end 2026
- Feb 2026

Supreme Court nullifies tariffs
- 20 Feb 2026

Refunds now allowed for 30% traiffs ☺

New 10% tariffs under different Act
- 21 Feb 2026

Court of Intl Trade stuck down 10% tariffs in early May 2026. Administration has appealed.

AGOA renewal & SA's continued eligibility

AGOA Re-authorised February 2026 by US Congress till end 2026

- Called for re-examination of AGOA with emphasis on bilateral deals – 'trade, not aid'. SA still included.
- AGOA still holds value for SA. Reduces overall tariff total. Especially now that Supreme Court struck down reciprocal tariffs and Court of International Trade struck down recent 10% tariff.
- Places SA on level playing field with competitors
- Likely to be re-authorised again at end 2026, for a longer period.
- **Call for Comment AGOA Modernisation – May 2026. Agbiz called for member inputs & submitted to dtic via NEDLAC & to USTR directly**

Other Bills

- Two other Bills ongoing. Calling for a review of SA as an national security risk & foreign interests risk. No movement on either.

Related developments

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Related trade variables / developments

Logistics = port / rail /rural roads

- A self-imposed non-tariff trade barrier?
- Rail reform underway, concessioning of some lines
- Government embracing PPPs
- Cape Town Container terminal performance most relevant barrier for Hortgro
- Rural roads – Agbiz working with other stakeholders and govt on a Free State pilot project

Iran conflict

- Middle East is an important market for SA agri – total 8%, significantly higher for many deciduous, from 12% minimum.
- Source of many fuel & ferlitilizer related inputs
- Saving grace – the US primaries (mostly June/July 2026) & mid-term elections (November 2026) timelines.

And finally, what a SA-US-China trading future should really look like…

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Trade works best over a braai!

Building C, 1st Floor, 477 Witherite Road, The Willows, Pretoria, South-Africa, 0184

PO Box 76297, Lynnwood Ridge, South Africa, 0040

Tel. +27 12 807 6686 | Fax. +27 12 807 5600

admin@agbiz.co.za | www.agbiz.co.za

Vat nr. 4920204684

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