TECHNICAL PAPER

SOUTH AFRICA

A POTENTIAL MARKET FOR AGRI-FOOD PRODUCTS FROM AFRICA

International Trade Centre

EXPORT IMPACT FOR GOOD

SOUTH AFRICA

A POTENTIAL MARKET FOR AGRI-FOOD PRODUCTS FROM AFRICA

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One of a series of sectoral and market studies regarding BRICS (Brazil, Russia, India, China and South Africa) countries - focuses on how to access the agri-food market in South Africa; provides an overview of the domestic market in the country; identifies export opportunities in sectors such as off-season fruits, fine vegetables, canned vegetables, and spices; outlines tariff and non-tariff barriers and special import regulations; covers freight forwarding, transport, and labelling requirements; highlights niche markets in the food and beverage sector with potential opportunities for suppliers from other African countries; reviews key market players, and procurement practices; includes case studies, statistical data, import tariffs for agri-food products, and a list of useful contacts.

Descriptors: **Tropical fruit, Canned vegetables, Spices, Market Access, Import Regulations, Tariffs, Non-Tariff Barriers, Case Studies, South Africa**.

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English

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Foreword

This technical paper aims to guide exporters in developing countries—mainly in Africa—on how to access the newly emerging agri-food market in South Africa.

Because of the global financial crisis, exporters in developing countries have recently faced shrinking or marginal export growth in many of their developed country markets. Although these markets continue to account for 80% of world imports, imports into large emerging markets like Brazil, the Russian Federation, India, China, South Africa—the BRICS countries—are growing faster and offer significant potential for exploitation by exporters in the developing world.

The International Trade Centre (ITC) implements a comprehensive approach to assisting exporters from least developed countries (LDCs) in market development and market diversification for key products in certain priority sectors. Under the approach, ITC helps to improve market networks, increases knowledge of new market opportunities in emerging markets and promotes South-South trade along the value chain, among other activities.

This report is one of a series of sectoral and market studies in BRICS countries commissioned by ITC. Specifically, it responds to the need for greater knowledge of how to export agri-food products to the South African market.

All studies were funded by limited resources from the ITC regular budget. Owing to cost constraints, they will be issued as technical papers in a small number of hard copies. Dissemination to developing country exporters will be done electronically and through the ITC website.

South Africa imported US$ 325 million worth of fruits, vegetables and spices in 2009. The market has room for new exporters in nearby countries of counter-season fresh produce like citrus, avocados, grapes, bananas and watermelons. It has also openings for dried beans, dehydrated vegetables and nuts, private-label canned vegetables and spice mixes, as well as chillies, turmeric, peppers and cumin.

The paper highlights some of the critical issues to be considered when entering the South African market, issues that are especially relevant to African exporters. All issues have to do with influencing South Africa's retailers and their current patterns of sourcing.

Finally, the paper provides inputs that would be useful in designing an initial proactive marketing strategy and in preparing an exporter for his or her first sales visit to the market.

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Pakco (Pty) Ltd

Pick n Pay Group

Shoprite Holdings Ltd

SPAR Group Ltd

Unilever South Africa

Woolworths (Pty) Ltd

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Note

Unless otherwise specified, all references to dollars ($) are to United States dollars, and all references to tons are to metric tons.

The following abbreviations are used:

EFTA	European Free Trade Association
EU	European Union
GN	Government Notice
HS	Harmonized Commodity Description and Coding System; South African Harmonized System Tariff
ITAC	International Trade Administration Commission
ITC	International Trade Centre
LSM	Living Standards Measure
MMA	Minimum Market Access
n.e.s	Not elsewhere specified
PHO	Port Health Officer
PQC	Port Quality Control
PRA	Pest Risk Assessment
R	South African Rand
SAAFQIS	South African Agricultural Food, Quarantine and Inspection Services
SACU	Southern African Customs Union
SADC	Southern African Development Community
SPS	Sanitary and phytosanitary

Executive summary

South Africa has a very strong agricultural sector; in most cases it is self-sufficient in fresh fruits and vegetables as well as in inputs for its food processing sector. Spices are the one category for which it has extremely limited local capacity and virtually all its requirements for this product group are imported.

In 2009, South Africa's imports of the fruits, vegetables and spices covered by this paper totalled 342 698 tons (US$ 325.7 million). The growth in imports has been extremely positive, with the figures showing overall increases of 75% in value and 48% in volume over the five-year period to 2009.

Imports are concentrated in certain product types and reflect the areas where South Africa has limited capacity to meet local demand. In 2009, some 70% of the volume of imports took place across 10 tariff headings. Dried kidney beans (HS 071333) are by far the most important import in this category, accounting for 27% of the total volume of imports in 2009. The next most important by volume is apple juice (HS 200979), followed by bananas, dried and shelled peas (HS 071310), prepared potatoes (HS 200410), grape juice (HS 200969) and prepared tomatoes, whole or in pieces (HS 200210).

South Africa has four windows of opportunity for exporters in developing countries...

This report has identified specific opportunities that exporters in developing countries could take advantage of. The most obvious opening is in the supply of out-of-season or counter-season fruits and certain vegetables. Imported counter-season fruit include citrus (currently sourced from Israel, Spain and Egypt), avocadoes (primarily from Spain), grapes, stone fruit (Spain) and bananas (Mozambique). The key buyers indicate that bananas and avocadoes probably offer the best opportunity for exporters in Africa. There are also market possibilities for watermelons and fine vegetables (long-stem broccoli, fine beans, snap peas, mangetout, and baby corn).

The second opening lies in the supply of raw materials for the food processing sector. South Africa has an extremely strong agri-processing sector. Rising domestic demand and the inability of domestic producers to meet demand in certain areas bode well for external suppliers of raw materials like dried beans, dehydrated vegetables and nuts. The keys to selling to this market are good quality products, consistency in both product quality and availability, and competitive pricing.

The third opportunity relates to the manufacture of products carrying the private or own brands of South Africa's large retailers and major importers. The number of private labels available in supermarkets is increasing. It seems that retailers have understood the value of differentiation and compete on price through meaningful private label offerings. A number of these products are manufactured internationally in response to the demand of retailers and importers for competitively priced products. Products that could be targeted for private labels include canned vegetables, canned beans, counter-season fruits, fine vegetables and specific spice mixes.

The fourth opportunity is for the supply of spices to South Africa. The country produces very little spice domestically and imports virtually all its requirements. Annual imports of spices are between 19 000 and 22 000 tons. Imports are dominated by chillies, turmeric, peppers and cumin. Developing country exporters could break into this market in a meaningful way provided they are in a position to offer what the market requires. The spice importers report that they will not procure from companies offering a single product. Spice exporters therefore need to put together a range of products with which to approach the South African market.

…but it is essential for exporters to take care of the barriers to entry first

This report has identified a major barrier to the entry of supplies of fruits and vegetables from the region. This is the inability of South African importers to obtain sanitary and phytosanitary (SPS) permits for produce sourced in Africa owing to the absence of procedures for Pest Risk Assessments.

The South African Department of Agriculture is particularly strict about blocking any agricultural product imports that may pose a risk to South African production. Poor in-country monitoring in a number of African countries and the lack of a reliable capacity to apply SPS requirements contribute to this problem. Regional

SPS standards have yet to be established and ratified. Until these issues are addressed, African producers are unlikely to find ready markets in South Africa.

A further constraint has to do with the fact that South African retailers and importers are basically unaware of the potential of African countries as suppliers. They do not know what products are on offer, which companies are exporting and what volumes are available. Countries and companies need to embark on targeted marketing campaigns to educate South African buyers.

1. The domestic market: an overall view

1.1. Domestic production: outputs, shortfalls and opportunities for external suppliers

A round-up of South Africa's market opportunities…

As can be seen below, South Africa offers windows of opportunity for external suppliers of fruits and vegetables. The biggest opportunity is provided by **spices,** of which domestic supplies (with the exception of chillies and peppers) are virtually non-existent. There are small market openings, during periods when local produce is not available, for **avocados** in November to January, **mangoes** from June to November and **strawberries** from January to April. **Bananas** are already being imported from two African countries, and a diversification of import origins could be explored.

The market for prepared **products for re-labelling and distribution** through retail outlets could also be looked at. Currently, specialist import companies obtain prepared beans and peas for this purpose.

South Africa has a strong agricultural sector. Although the industry accounts for only 2.5% of the gross domestic product (GDP), it has strong forward and backward linkages to the economy and its overall contribution is considerably higher than the GDP figure indicates.

In addition to fresh produce, the sector generally provides the inputs required by the food processing industry. The industry is diverse, with manufacturers having to meet the needs of the sophisticated middle- and upper-income groups while at the same time supplying staple foods at low prices to the poorer sectors of the population. The drivers for growth in the agri-food sector are overall population growth and rising incomes, and particularly the emergence of a strong black middle class.

The major fruit and vegetable crops grown in South Africa and annual production volumes are detailed in table 1.

Table 1. South Africa: domestic production of fruits and vegetables, 2009

Crop	Production (tons)	Crop	Production (tons)
Fruit		Crops	
Apples	798 000	Dry beans	74,000
Apricots	50 000	Vegetables	
Grapes	1 821 000	Potatoes	1 868 000
Pears	348 000	Tomatoes	515 000
Peaches	163 000	Pumpkins	229 000
Plums	60 000	Green corn	336 000
Prunes	4 000	Onions	472 000
Cherries	3 00	Sweet potatoes	62 000
Quinces	2 00	Green peas	15 000
Figs	2 000	Beetroot	61 000
Strawberries	6 000	Cauliflower	18 000
Other berries	8 00	Cabbage and red cabbage	141 000
Watermelons and melons	72 000	Carrots	164 000
Other summer fruit	14 000	Green beans	25 000
Dried fruit – tree fruit	6 000	Other	389 000
Dried fruit – vine fruit	33 000		
Avocados	96 000		
Bananas	405 000		

Crop	Production (tons)	Crop	Production (tons)
Granadillas	6 00		
Litchis	5 000		
Guavas	26 000		
Loquats	1 00		
Mangoes	43 000		
Pawpaws	14 000		
Pineapples	117 000		
Oranges	1 525 000		
Lemons and limes	230 000		
Grapefruit	341 000		
Naartjies (tangerine)	30 000		
		Total: vegetables	**4 295 000**

Source: Department of Agriculture, Forestry and Fisheries.

South Africa accounts for about 6% of the world's pineapple production. It does not have the ideal conditions for producing pineapples and the locally produced fruit has a high acid content. Two varieties are grown commercially: smooth leaf Cayenne and Queen. The Cayenne is the larger crop and is the only variety suitable for canning. Pineapple growers in the Eastern Cape, through the Pineapple Growers Association, have traditionally supplied almost all pineapples required by the country's fruit processing industry.

However, the previously buoyant pineapple sector was virtually wiped out in 2007 when it was discovered that the fertilizer being used, an import, contained an unacceptably high level of cadmium. As a result, all South African pineapple products lost their European Union certification.

All the fresh pineapples supplied to the country's retailers originate from the province of KwaZulu-Natal. Pineapple pulp is prepared to the specifications of fruit juice producers and is sold frozen to manufacturers.

The main growing regions for avocados are the provinces of Mpumalanga and Limpopo, and 8% of the local crop is produced in KwaZulu-Natal. A total of between 75 000 and 100 000 tons of the fruit is produced yearly.

While the Fuerte cultivar dominates acreage at around 40% of the total, the Hass cultivar now accounts for about 35% and is the only variety seeing significant expansion. Ryan, Pinkerton and Edranol are also cultivated, and there is rising interest in Lamb Hass, Harvest and Gem.

Avocados are produced from February to October, and there is a small window for imports in November, December and January. During these months the fruit is imported mainly from Spain, Israel and Kenya.

The avocado processing industry is relatively small and produces 2 000 to 3 000 tons of avocado oils and guacamole for the catering trade and small amounts for export.

South Africa's output of mangoes has fluctuated between 40 000 and 75 000 tons yearly. The percentage of fruit exported has declined in the recent years, but the local market absorbs about 20 000 tons of fresh fruit annually.

Other distribution channels have developed to take the remaining fruit. The dried mango industry processes almost 15 000 tons of fresh fruit a year. Juicing and achar (pickle) operations are also major outlets, using up a yearly 20 000 tons and 15 000 tons respectively.

The main growing areas for mangoes are Mpumalanga, Limpopo and KwaZulu-Natal. Fruit is available between December and May, but much of the crop is harvested in December and January.

Small volumes of mangoes are imported between June and November from Zimbabwe and Mozambique, which have slightly longer growing seasons than South Africa. Pulp is supplied frozen to fruit juice manufacturers according to their specifications.

South Africa’s strawberries, consisting mainly of local cultivars, are produced on about 350 hectares, mostly in the North West, Gauteng and Western Cape provinces. Farmers in Gauteng and North West who grow strawberries in tunnels have fruit available from late May until mid-December. In the Western Cape the season is late October to December. Imports are necessary to meet demand in the remaining months.

Passion fruit is available locally 12 months of the year from different provinces, and as a result very little importing of the fruit is necessary. The supply of pulp for fruit juice manufacturers is provided largely by contract farmers. Prices are set once a year, and the pulp is received regularly throughout the year.

South Africa produces a range of deciduous fruits. Much of the fruit grown is absorbed by the local fruit processing industry, in particular by the canning and fruit juice subsectors. Manufacturers of processed foods tend to work with a select group of growers.

In 2009, 405 000 tons of bananas were produced locally. Most of this fruit is consumed within the country. The supply of bananas is augmented by imports from neighbouring countries, particularly Mozambique and Zimbabwe.

South Africa is a key global producer of citrus fruit, supplying the domestic pulp and fruit juice industry. It is also a net exporter of this fruit, mainly to the European Union. In 2009 South Africa produced 1.5 million tons of oranges, as well as 341 000 tons of grapefruit, 230 000 tons of lemons and limes, and 30 000 tons of mandarins.

South Africa’s total output of vegetables in 2009 was in the region of 4.3 million tons. Some 1.9 million tons of potatoes, 515 000 tons of tomatoes, 472 tons of onions, 336 000 tons of green corn and 229 tons of pumpkins were produced. These are the country’s primary vegetable crops and accounted for 74% of the volume of vegetables sold through fresh produce markets in 2009.

South Africa grows potatoes throughout the year. The potato processing industry has expanded over the past 10 years, and it now consumes 19% of the potato crop. The industry uses 380 000 tons of fresh potatoes, of which 320 000 tons are contracted from producers and the balance purchased from fresh produce markets. The larger section of the industry makes French fries, frozen and chilled products, and crisps.

The remaining food processing sector, consisting of a few players, is small, producing a limited amount of frozen vegetables. Prepared beans and peas are largely imported by specialist import companies and are then relabelled and sold in retail stores across the country.

According to the South African Canning Association, more than 600 000 tons of fresh fruits, tomatoes and vegetables are processed annually, and these are sourced from 1 500 farms. Vegetables for canning are grown in most parts of the country. However, the market for vegetables processed domestically is relatively undeveloped in South Africa, owing to the availability of cheap imports.

South African is the third largest producer of macadamia nuts in the world, with its output increasing more than sevenfold from 840 tons of edible kernel in 1996 to about 6 800 tons in 2008.

Close to a thousand farmers produce macadamia nuts, which are supplied to 12 cracking factories. The industry is export-based, with more than 95% of annual production shipped to international markets. Pecans are grown on a very small scale. Of the 2,500 tons harvested annually (valued at US$ 1.25 million), 5% is exported and the rest is used locally.

South Africa does not grow spices and imports most of its requirements. The country produces only around 10 000 tons of chillies and peppers yearly.

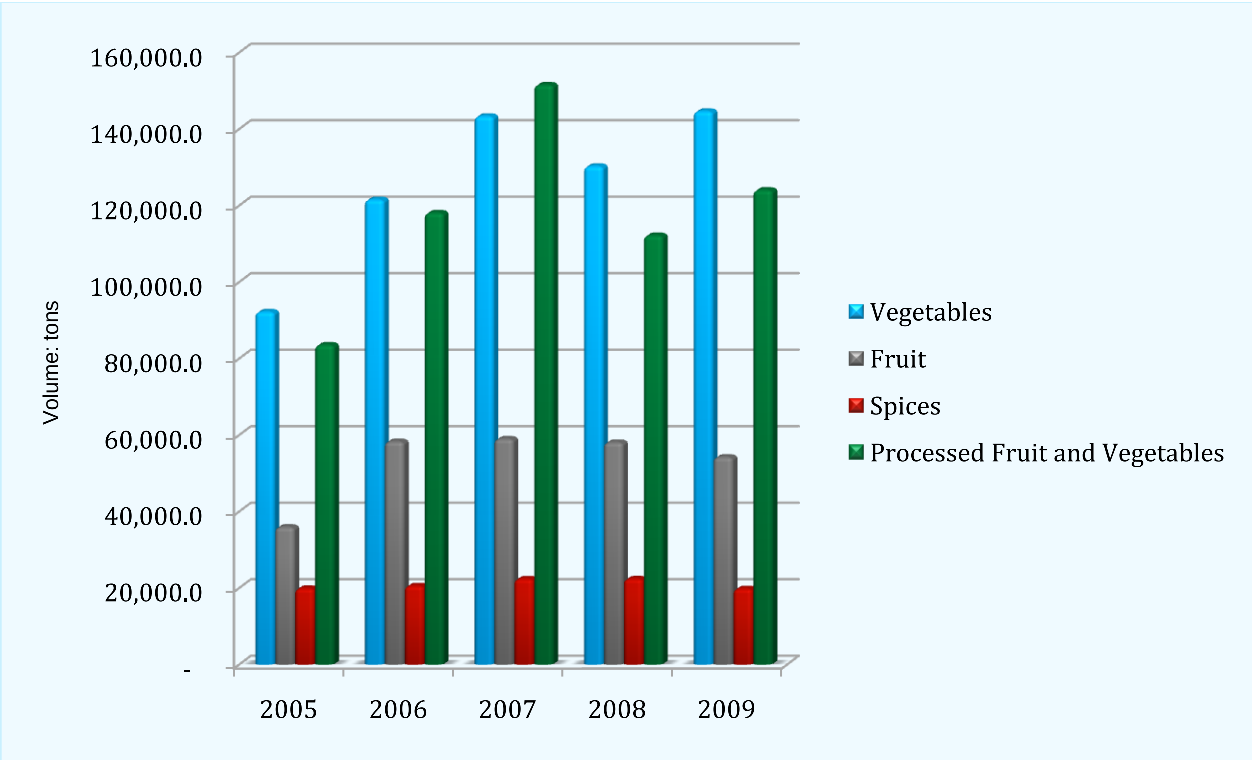
1.2. International trade[1]

1.2.1. Imports

1.2.1.1. Volume and value: a rapidly expanding trade

In 2009, South Africa's imports of fruits, vegetables and spices totalled 342 698 tons, valued at US$ 325.7 million. As illustrated in figure 1, the growth in imports has been extremely positive with figures showing overall increases of 75% by value and 48% by volume over the 2005-2009 period. The fastest growth has been in vegetables, of which the volume rose by 57% over the period. Spices are the one category which failed to register a rise.

Figure 1. South Africa's imports of agri-food products, trends by volume, 2005-2009



Source: Based on ITC's TradeMap data.

1.2.1.2. Composition: concentration on 10 tariff headings

The big seven in the import trade: dried kidney beans, apple juice, bananas, peas, prepared potatoes, grape juice, prepared tomatoes…

Of the 342 698 tons of fruits, vegetables and spices imported in 2009, vegetables made up 42%, processed fruits and vegetables 36% and fruit 16%; the remainder consisted of spices. In terms of products, imports are concentrated, with 70% of the volume taking place across 10 tariff headings.

Dried kidney beans (HS 071333) are by far the largest import in this category, accounting for 27% of the total in 2009. The next most significant items are apple juice (HS 200979), followed by bananas, dried and shelled peas (HS 071310), prepared potatoes (HS 200410), grape juice (HS 200969) and prepared tomatoes, whole or in pieces (HS 200210).

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[1] This trade analysis focuses on Chapters 7, 8 and 20 and selected codes from Chapter 9 of the South African Harmonized System Tariff (HS).

The drivers of the import trade are shortfalls in local supplies (dried beans, apple and other fruit juices) and demand for speciality or out-of season fresh vegetables and fruit…

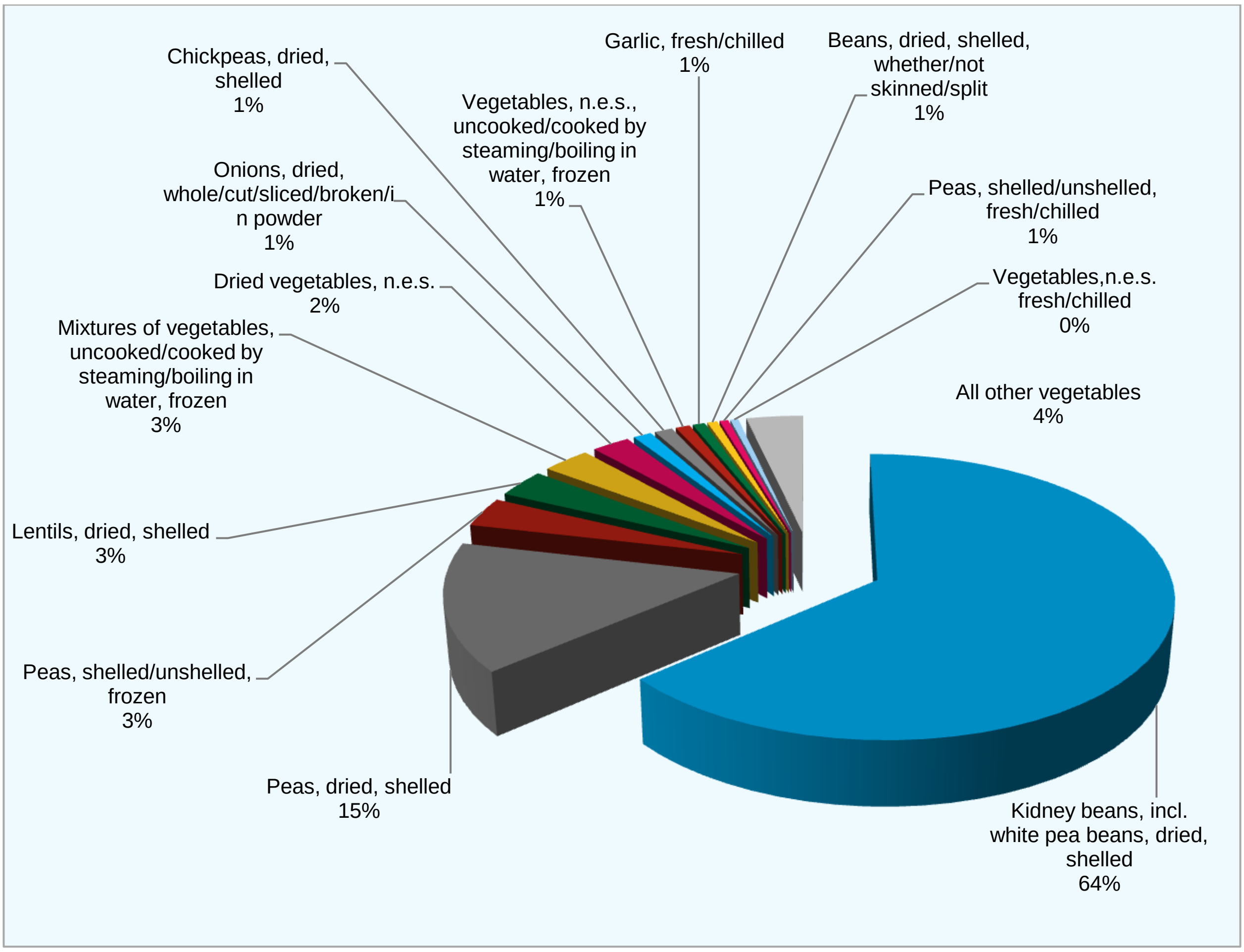
Dried beans are an important protein source in the South African diet and imports are required early to make up for the shortfall between domestic production and demand. The level of imports therefore depends on the success of the local crop. About 10% of dried bean usage is for canning; 90% is sold direct to packers for distribution to the retail sector.

While South Africa is a major fruit juice producer and exporter, apple juice and grape juice are imported to make up for the shortfall in supplies to meet local demand. These two juices are used as the base for other flavours by the big fruit juice producers.

As shown in figure 2, South Africa does not import much in the way of fresh vegetables. The country is generally self-sufficient in this product group. Imported fresh and chilled vegetables tend to be speciality or out-of-season vegetables such as baby sweetcorn, mangetout, snow peas, asparagus and fine beans.

As mentioned above, dried leguminous vegetables are an important part of the overall import basket. In addition to being packaged directly for retail sale, these products are used in the manufacture of stocks and soups.

Figure 2. Composition of South Africa's vegetable imports, percentage shares by volume, 2009



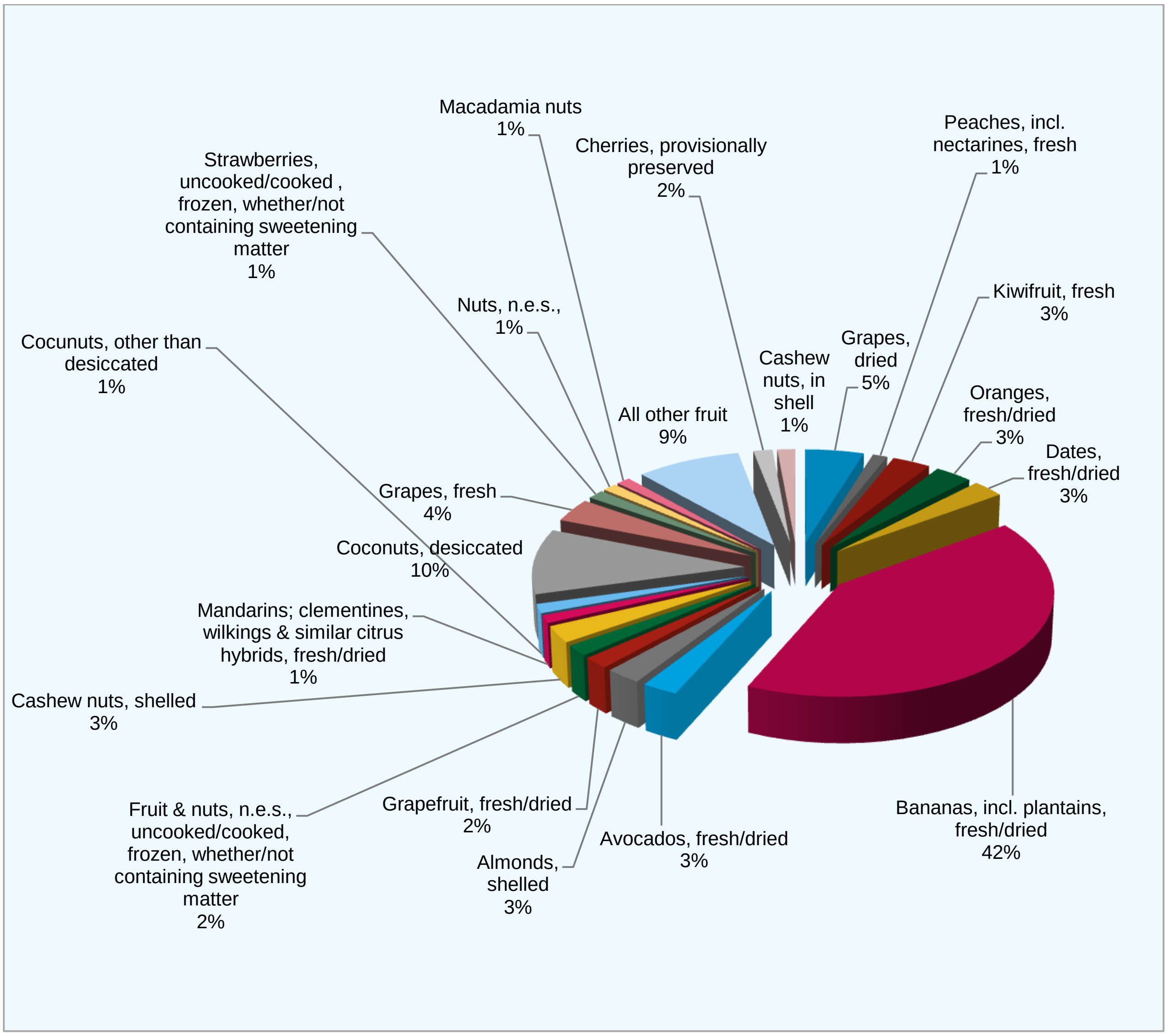
Source: Based on ITC's TradeMap data.

Figure 3 covers South Africa's imports of fruits. Bananas are the largest import. Whilst South Africa produces around 400 000 tons of bananas annually, this falls short of demand and the local product is supplemented with imports from regional sources, namely Mozambique and Zimbabwe.

Other fruit imports consist of products that are not produced in South Africa (such as kiwifruit) and fruits meeting off-season demand like avocados, mandarins and clementines, nectarines, peaches and oranges.

Nuts form an important part of the import basket as South Africa produces only macadamias and pecans. All other nuts are imported.

Figure 3. Composition of South Africa's imports of fruits and nuts, percentage shares by volume, 2009

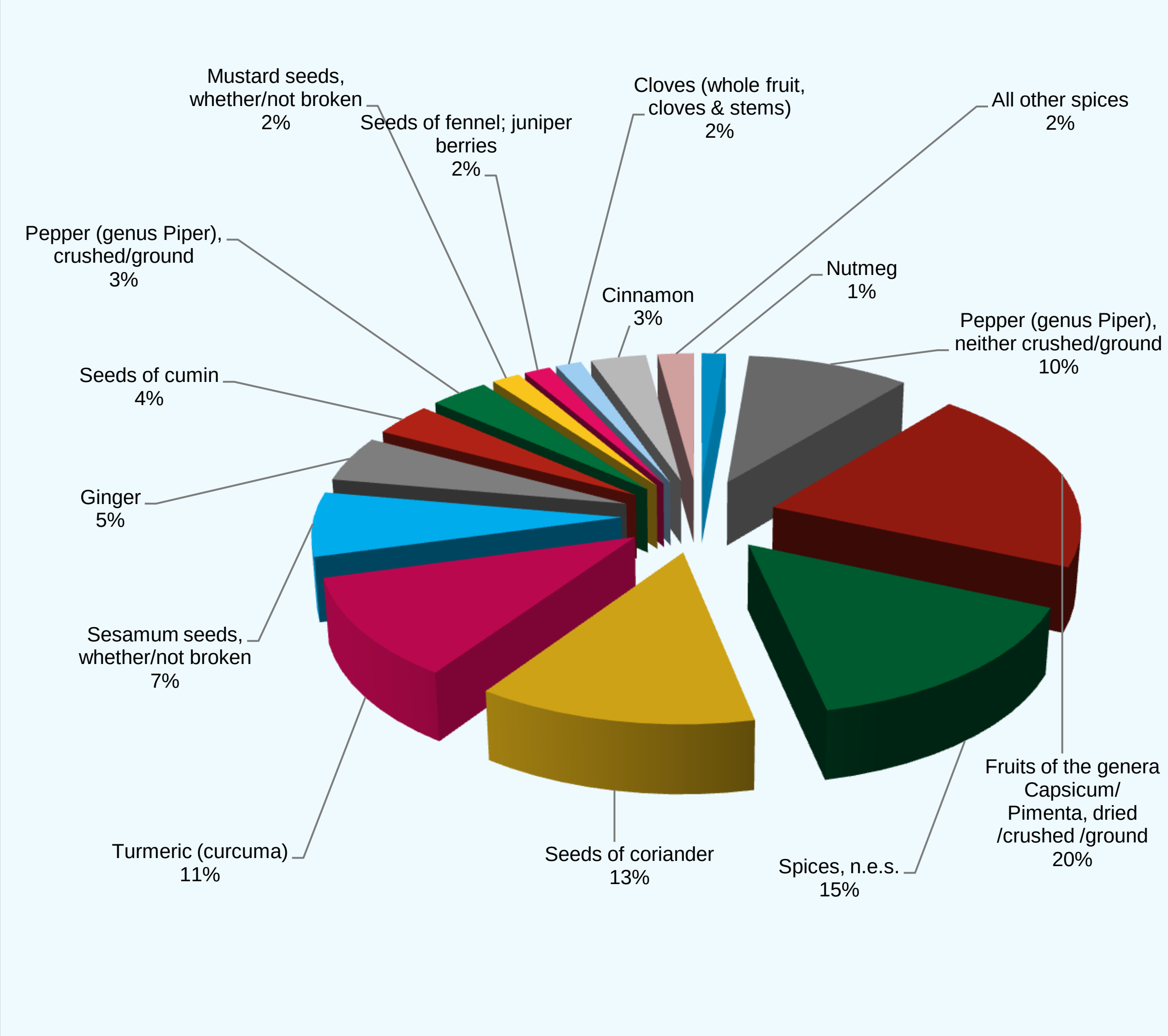


Source: Based on ITC's TradeMap data.

South Africa imports all of its spices

As mentioned earlier, South Africa imports virtually all of its requirements of spices. The largest imports in this category consist of dried, crushed and ground chillies, followed by coriander seeds, turmeric and whole pepper. Other significant spice imports are sesame seeds, ginger, cumin, cinnamon, mustard seeds and cloves.

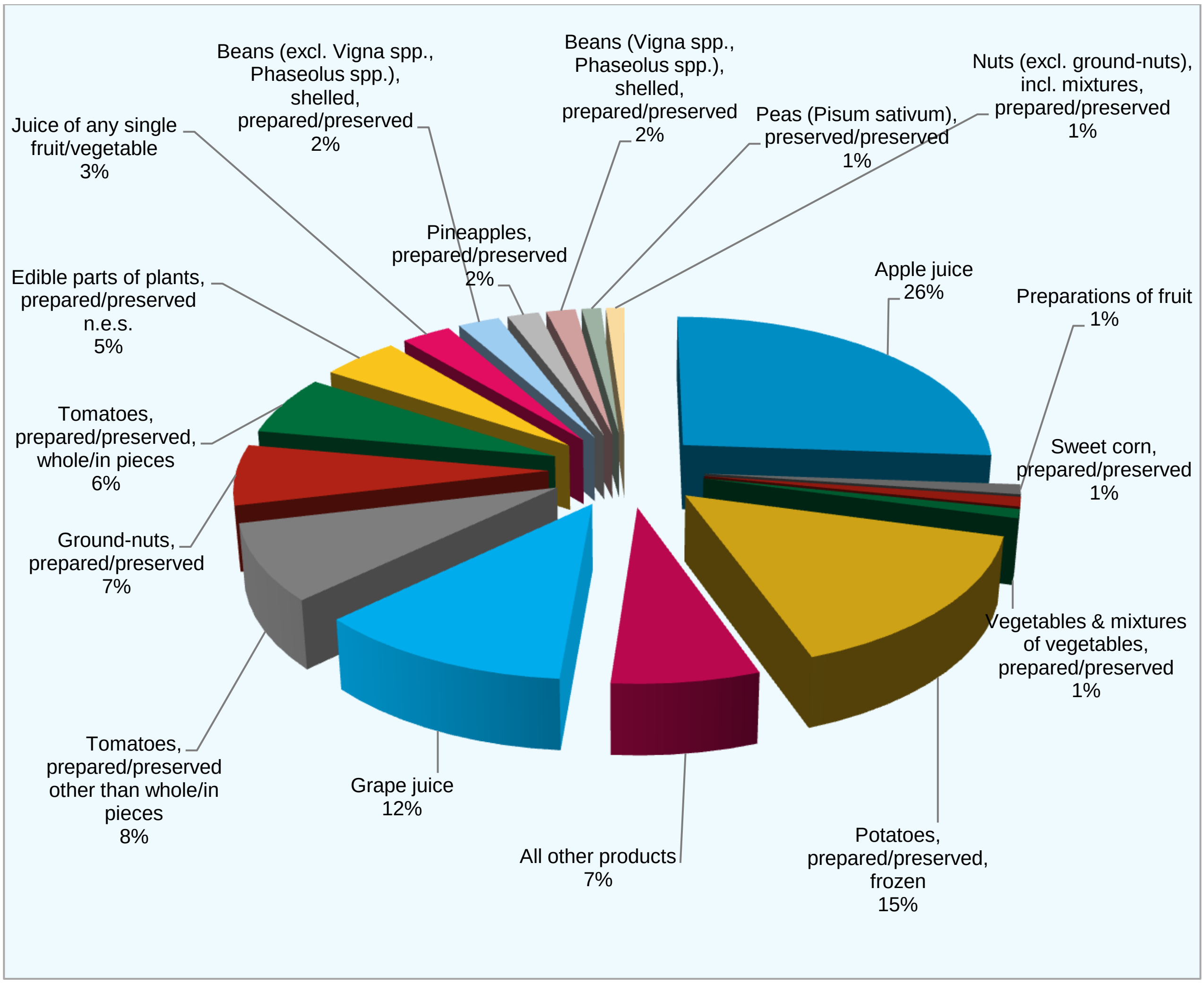
Figure 4. Composition of South Africa's imports of spices, percentage shares by volume, 2009



Source: Based on ITC's TradeMap data.

Figure 5 looks at South Africa's imports of processed fruits and vegetables. As explained above, apple and grape juice are the leading annual imports and are used in the production of other juice products. Prepared, frozen potatoes are another important category; these consist of fries primarily for the catering and food services sector. The other categories worthy of mention are canned tomatoes, and prepared and preserved groundnuts (salted peanuts and peanut butter).

Figure 5. Composition of South Africa's imports of processed fruits, vegetables and other products, percentage shares by volume, 2009



Source: Based on ITC's TradeMap data.

A full breakdown of the statistics by the six-digit HS code is provided in appendix I.

1.2.1.3. Origins: six countries provide 70% of all imports

Six countries account for 70% of imports of the agri-food products covered by this report. They are China, Canada, Argentina, Mozambique, India and Italy. Table 2 shows the main products from these suppliers.

Table 2. South Africa: six largest suppliers of imported agri-food products, percentage shares by volume, and key products, 2009

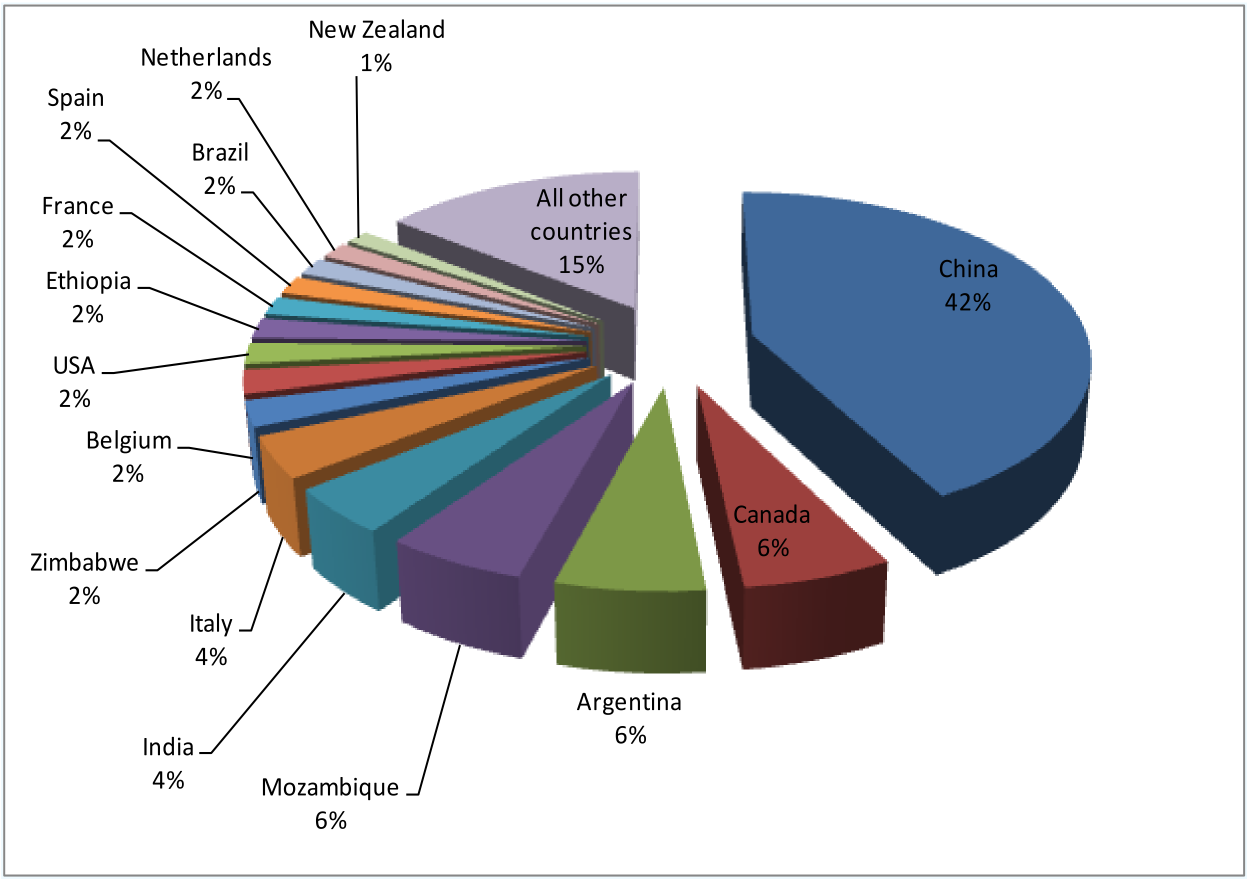
Origin	Percentage share in overall imports of agri-food products	Key products and percentage shares in agri-food exports to South Africa, by origin, 2009
China	42%	Kidney beans, including white pea beans (*Phaseolus vulgaris*), dried, shelled, whether/not skinned/split (57%). Apple juice (22%).Tomatoes, prepared/preserved, other than whole/in pieces (6%).
Canada	6%	Peas (*Pisum sativum*), dried, shelled, whether/not skinned/split (80%). Lentils, dried, shelled, whether/not skinned/split (15%).
Argentina	6%	Grape juice (58%). Prepared or preserved groundnuts (17%). Prepared or preserved potatoes, frozen (10%). Kidney beans, including white pea beans (*Phaseolus vulgaris*), dried, shelled,

Origin	Percentage share in overall imports of agri-food products	Key products and percentage shares in agri-food exports to South Africa, by origin, 2009
		whether/not skinned/split (6%).
Mozambique	6%	Bananas (94%).
India	4%	Spices, n.e.s (16%). Turmeric (14%). Fruits of the genera Capsicum/Pimenta, dried/crushed/ground (13%). Onions, dried (9%). Sesamum seeds (8%).
Italy	4%	Tomatoes, prepared/preserved otherwise than by vinegar/acetic acid, whole/in pieces (52%). Grape juice (9%). Tomatoes, prepared/preserved otherwise than by vinegar/acetic acid, other than whole/in pieces (8%). Beans (*Vigna* spp., *Phaseolus* spp.), shelled, prepared/preserved (6%). Cherries, provisionally preserved (5%).

Source: Based on ITC's TradeMap data.

Zimbabwe, Belgium, the United States of America, Ethiopia, France, Spain, Brazil, the Netherlands and New Zealand are among South Africa's other significant suppliers of the product group under review. Together they provide 17% of total imports.

Figure 6. Origins of South Africa's imports of agri-food products, percentage shares by volume, 2009



Source: Based on ITC's TradeMap data.

Only a handful of African countries trade with South Africa. It would be useful for other countries to learn how these countries have succeeded in penetrating the difficult South African market

South Africa takes very little supplies from other countries in Africa. In 2009, these countries provided 13% of the volume and 8% of the value of all imports. In effect, only a handful of African countries trade with South Africa, as can be seen in table 3.

Table 3. South Africa: imports of agri-food products from Africa, by origin, 2005 and 2009

Value: US$ '000 Volume: tons

Origin	2005		2009		Percentage shares in all imports from Africa		Agri-food products
	Value	Volume	Value	Volume	Value	Volume	
Mozambique	1 553	4 311	5 828	19 646	23	45	Bananas
Zimbabwe	3 446	7 190	2 495	8 447	10	19	Bananas; oranges; fruits of the genera Capsicum/ Pimenta, dried/crushed/ ground
Ethiopia	568	1 587	2 942	6 579	11	15	Kidney beans; ginger
Egypt	2 799	5 291	3 084	2 884	12	7	Potatoes, prepared and preserved, frozen; fresh grapes; fresh strawberries, fresh onions and shallots
Malawi	1 724	2 050	4 448	1 630	17	4	Chickpeas; macadamia nuts; dried or shelled peas; fruits of the genera Capsicum/ Pimenta, dried/ crushed/ ground
Kenya	1 011	1 462	815	1 402	3	3	Vegetables, fresh/chilled; edible parts of plants, prepared/preserved; peas shelled/unshelled, fresh/chilled; pineapple juice; beans shelled/unshelled, fresh/chilled
Zambia	497	1 202	1 858	1 081	7	2	Beans, shelled/unshelled, fresh/chilled; vegetables, fruit, nuts and other edible parts of plants, prepared/ preserved; fruits of the genera Capsicum/Pimenta, dried/crushed/ground; vegetables,n.e.s., fresh/chilled
Madagascar	420	307	998	610	4	1	Peas (*Pisum sativum*), dried, shelled, whether/not skinned/split; beans (*Vigna* spp., *Phaseolus* spp.), dried, shelled, whether/not skinned/split; edible parts of plants, prepared/preserved n.e.s
Nigeria	914	678	501	520	2	1	Ginger, spices n.e.s; dried vegetables, n.e.s.; mixtures of dried vegetables, whole/cut/sliced/broken/in powder but not further prepared
United Republic Tanzania	1 795	347	2 101	479	8	1	Cashew nuts, beans (*Vigna* spp., *Phaseolus* spp.), dried, shelled, whether/not skinned/split
TOTAL	**15 613**	**25 359**	**25 680**	**43 504**			
Percentage of total Imports	**8**	**11**	**8**	**13**			

Source: Based on ITC's TradeMap data.

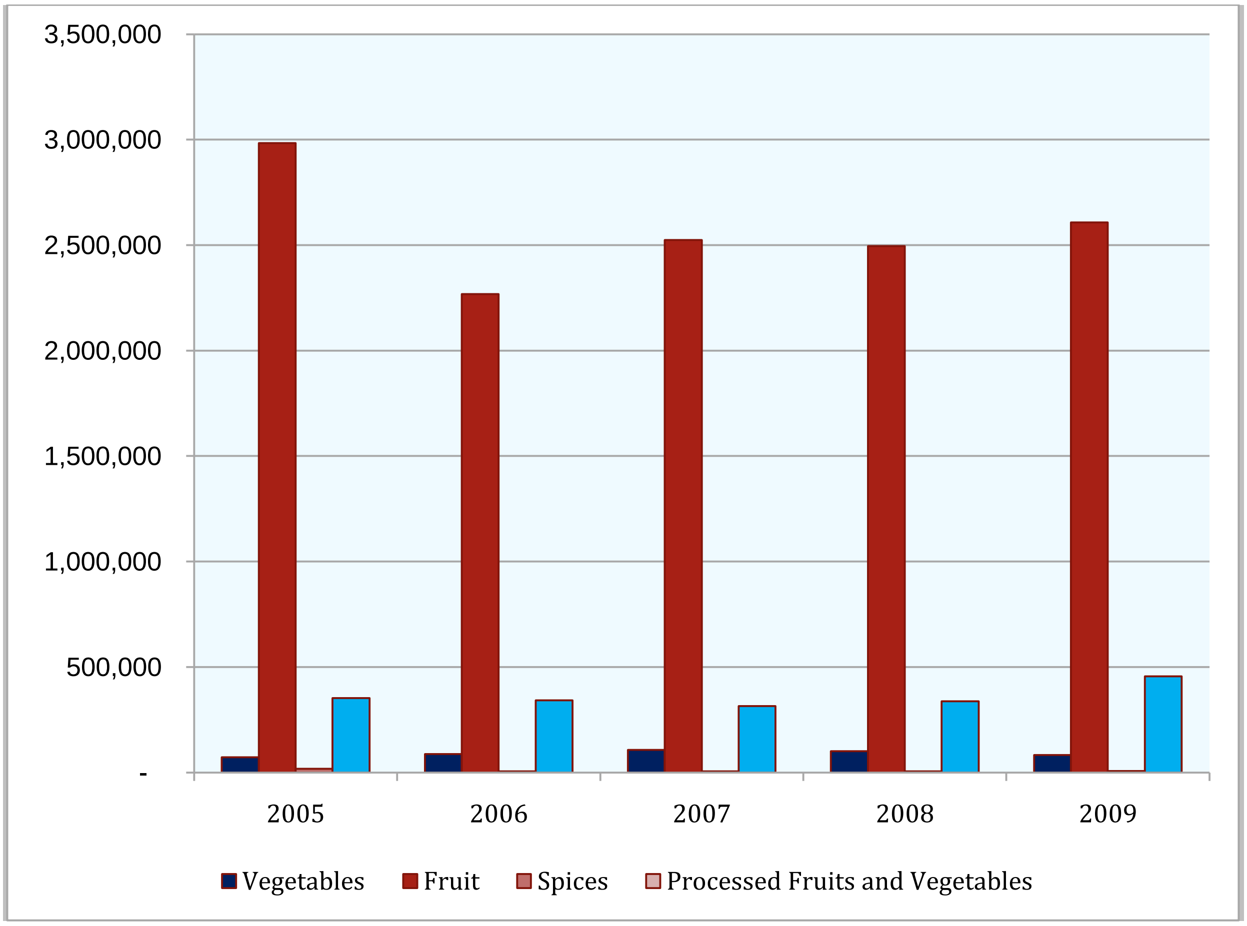
1.2.2. Exports

South Africa is a net exporter of fruits but a net importer of all other agri-food products...

Overall, South Africa is a net exporter of agri-food by a sizeable margin. However, this is attributable purely to fruits, which make up the bulk of its exports (figure 7). The country is a net importer of all other agri-food categories.

Figure 7 also shows that exports of fruits declined over the five-year period covered. However, the drop took place on the back of a bumper export year for fruits in 2005. Exports of all other categories remained fairly constant over the period.

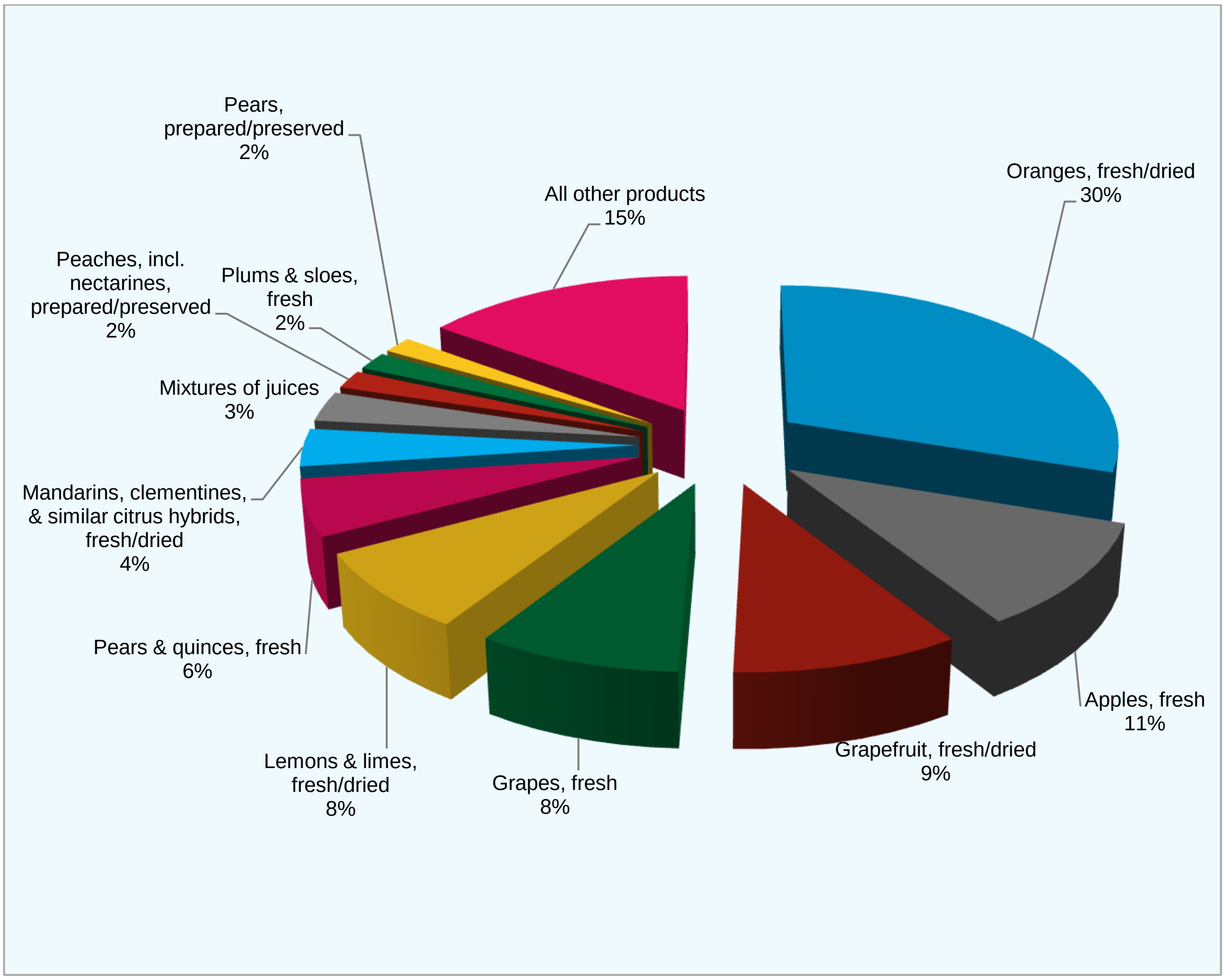
Figure 7. Trends in the volume of South Africa's agri-food exports, 2005-2009



Source*:* Based on ITC's TradeMap data.

Figure 8 clearly shows that oranges, apples, grapefruit, grapes, and limes and lemons are the leading exports.

Figure 8. Composition of South Africa's agri-food exports, percentage shares by volume, 2009

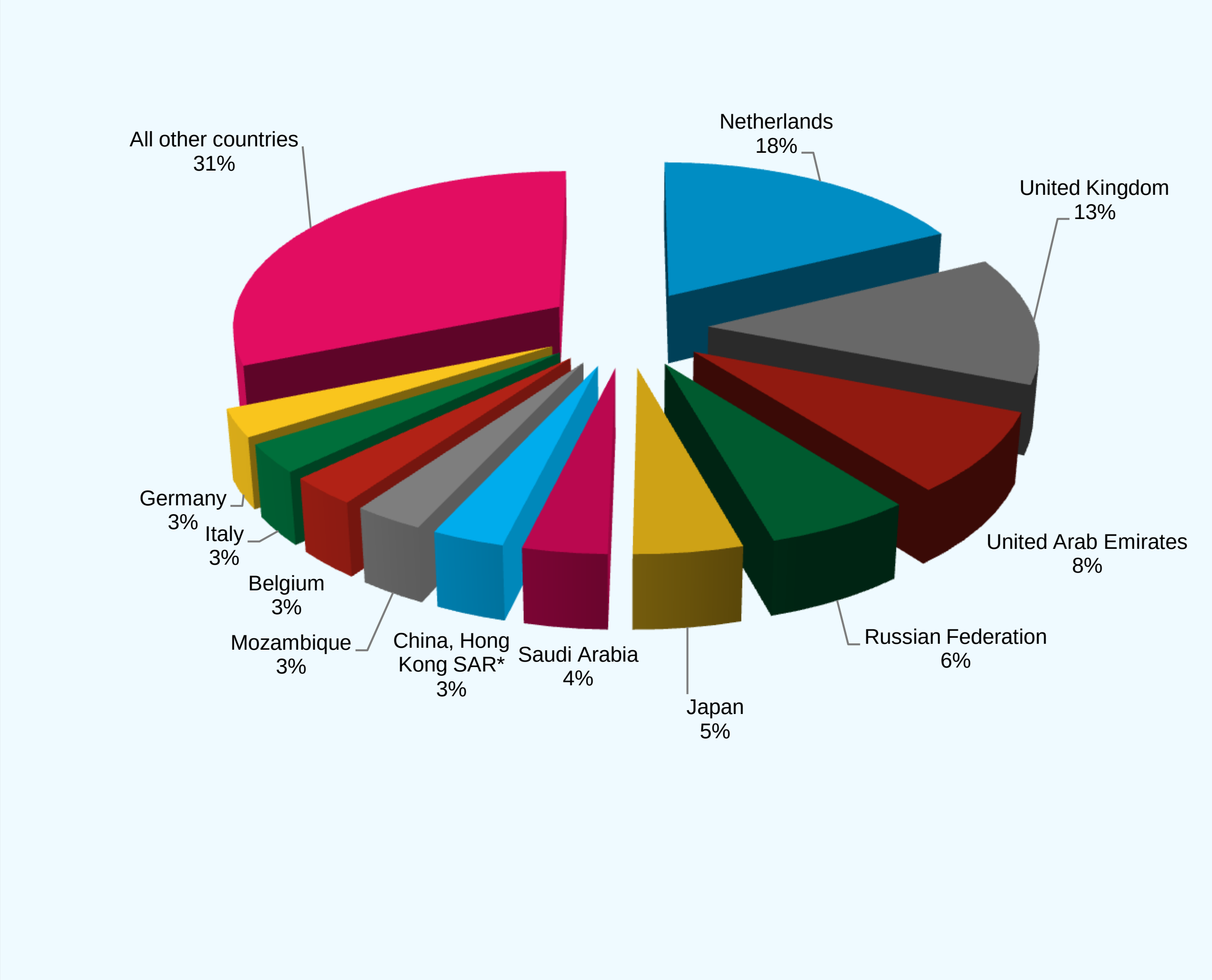


Source: Based on ITC's TradeMap data.

Export destinations

The destinations of South Africa's exports are varied. The two key markets are the United Kingdom and the Netherlands, followed by the United Arab Emirates, Japan and Saudi Arabia.

Figure 9. Destinations of South Africa's agri-food exports, percentage shares by volume, 2009



Source: Based on ITC's TradeMap data.

* Special Administrative Region

1.3Market size

Given the lack of published statistical data on processed fruits and vegetables, it is not possible to give a figure for the size of the market for these products. South Africa imports around 124 000 tons of these items yearly and imports have shown strong growth, indicating a healthy market for foreign suppliers.

The market for spices is predominantly catered for by imports as very small quantities are produced locally. Annual imports amount to between 19 000 and 22 000 tons. Imports are dominated by chillies, turmeric, peppers and cumin.

Table 4 details the country's annual consumption of fresh fruits and vegetables. It is interesting to note that imports currently account for 1% of fruit consumption and less than 1% of vegetable consumption, suggesting that the South African market offers only a small niche for external suppliers of fresh fruit and vegetables.

The situation is entirely different for dried beans, of which imports make up 56% of overall consumption. Imports are, however, from China and exporters from African countries would need to compete on price with the Chinese.

Table 4. South Africa: consumption of fresh fruits and vegetables, by volume, 2009

	Local production (tons)	Imports (tons)	Exports (tons)	Consumption (tons)	Imports as percentage (%) of consumption
Fruit					
Apples	798 000	235	338 829	459 406	0
Apricots	50 000	2	7 459	42 543	0
Grapes	1 821 000	1 977	270 877	1 552 100	0
Pears and quinces	348 200	185	180 383	168 002	0
Peaches	163 000	658	9 631	154 027	0
Plums	60 000	503	56 883	3 620	14
Cherries	300	42	59	283	15
Figs	2 000	99	66	2 033	5
Strawberries	6 000	420	48	6 372	7
Other berries	800	8	1 211	-403	-2
Watermelons and melons	72 000	-	3 034	68 966	0
Other summer fruit	19 700	1 896	10 962	10 634	18
Avocadoes	96 000	1 381	46 162	51 219	3
Bananas	405 000	22 615	376	427 239	5
Guavas and mangoes	69 000	500	2 849	66 651	1
Pawpaws	14 000	-	233	13 767	0
Pineapples	117 000	231	5 076	112 155	0
Oranges	1 525 000	1 699	951 557	575 142	0
Lemons and limes	230 000	96	253 252	-23 156	0
Grapefruit	341 000	999	303 960	38 039	3
Naartjies (Tangerine)	30 000	661	120 154	-89 494	-1
Total: fruit	6 168 000	34 204	2 563 061	3 639 143	1%
Dry beans	74 000	93 887	1 586	166 301	56
Vegetables					
Potatoes	1 868 000	53	26 334	1 841 719	0
Tomatoes	515 000	-	-	515 000	0
Pumpkins	229 000			229 000	0
Green corn	336 000			336 000	0
Onions	472 000	598	24 856	447 742	0

	Local production (tons)	Imports (tons)	Exports (tons)	Consumption (tons)	Imports as percentage (%) of consumption
Sweet potatoes	62 000	-	-	62 000	0
Green peas	15 000	798	97	15 701	5
Beetroot	61 000	93	417	60 676	0
Cauliflower	18 000	143	376	17 767	1
Cabbage and red cabbage	141 000	0	682	140 318	0
Carrots	164 000	125	3 846	160 279	0
Green beans	25 000	703	270	25 433	3
Other	389 000	2 220	12 114	379 106	1
Total: vegetables	**4 295 000**	**4 734**	**68 992**	**4 230 742**	**0**

Sources: Department of Agriculture, *Abstract of Agricultural Statistics* (Pretoria); ITC's TradeMap data.

2. Import tariffs, taxes and preferential trade regimes

The framework of the external tariff is the two-column Harmonized Commodity Coding and Description System (HS). Import duties are levied ad valorem on the FOB (free on board) value.

The tariffs on fresh and processed fruits and vegetables range from zero to 37% depending on the product. In most instances, where South Africa is not a producer of the product, the tariff rate is zero for all sources. This is the case with spices. All goods originating in fellow Member States of the Southern African Customs Union (SACU) and Southern African Development Community (SADC) enter duty free.

A full schedule of the tariffs on the products under study is provided in appendix II.

A value-added tax (VAT) of 14% is payable on all imports. It is levied on the value for customs duty, which is the FOB value plus 10% of the FOB value plus any additional duties paid.

Where goods are imported from within the SACU region, no customs duties are applicable and the 10% upliftment in value is not applied provided that the goods have their origin in a SACU member country. However, VAT is still payable on importation into South Africa at 14% of the value for customs purposes.

As indicated above, South Africa is a member of the Southern African Customs Union (SACU) along with Botswana, Lesotho, Namibia and Swaziland. Goods are traded within the customs union free of duty.

South Africa is also a member of the Southern African Development Community (SADC)[2]. Under the SADC Trade Protocol implemented in September 2000, South Africa agreed to reduce tariffs on goods originating in SADC Member States to zero over a period of eight years. The tariffs on goods originating in SADC are therefore currently zero.

The EU/SA Free Trade Agreement came into effect in January 2000. Under the agreement, the European Union (EU) undertook to reduce its import tariffs to zero over a period of seven years. South Africa also undertook to reduce its duties to 50% of the most-favoured nation (MFN) tariff level over an eight-year period. The current rate on agri-products from EU is indicated in appendix II.

[2] Other members are Angola, Botswana, the Democratic Republic of the Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Swaziland, the United Republic of Tanzania, Zambia and Zimbabwe.

The SACU agreement with the European Free Trade Association **(**EFTA)[3] member countries came into effect on 1 January 2007. The Agreement covers trade in industrial goods and processed agricultural products. Trade in basic agricultural products is covered by individual bilateral agreements with SACU States. On implementation, EFTA States abolished all duties on goods originating in SACU and SACU has agreed to a progressive reduction of all tariffs. The tariff on goods from EFTA is also shown in appendix II.

3. Non-tariff barriers

3.1. Special import regulations

The International Trade Administration Act (Act 71 of 2003) provides for the control of the import and export of goods specified by regulation through a permit system. The International Trade Administration Commission (ITAC) is charged with issuing import and export permits under the provisions of Section 6 of the Act, and with conducting investigations and ensuring enforcement in accordance with Part E. About 208 tariff subheadings covering new goods are subject to import control measures.

None of the products covered by this paper require an import permit from ITAC.

In addition to the import control regulations administered by ITAC, there are other regulations covering a wide variety of goods which either totally prohibit importation or require inspection before importation. These are implemented by other authorities which may issue special permits or licences to import. Some goods may be imported only by certain authorities.

All imports of fresh fruits and vegetables, nuts and spices are detained at the port of entry for inspection by the Directorate of South African Agricultural Food, Quarantine and Inspection Services (SAAFQIS) of the Department of Agriculture. SAAFQIS inspects for pests under the Agricultural Pests Act (Act 36 of 1983).

All foodstuffs are detained for inspection by the Port Health Officer, except when they are intended for consumption by diplomatic and consular representatives.

Table 5 outlines the import restrictions on the products under study.

Table 5. South Africa: import restrictions on agri-food products

Heading	Designation of goods	Prohibition and restriction	Authority	Action required
07.01	Potatoes, fresh or chilled	(i) Licence from the Director-General (DG): Agriculture, Marketing Administration (ii) Permit from the Directorate of Plant & Quality Control (iii) Subject to acceptable certificate from country of origin	Proc. 209/1966. General Note (GN) R. 1153/1966. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for Pest Quality Control (PQC). Detain for the Port Health Officer (PHO).
07.02	Tomatoes, fresh or chilled	May only be imported from Zimbabwe under authority of a permit issued by the DG, Department of Agriculture, Marketing Administration, and a permit from the Directorate, Plant & Quality Control	GN R. 1967/1964. Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.

[3] Iceland, Lichtenstein, Norway and Switzerland.

Heading	Designation of goods	Prohibition and restriction	Authority	Action required
07.03	Onions, shallots, garlic, leeks and other alliaceous vegetables, fresh or chilled: onions imported from Zimbabwe during the months of August, September, October, November, December or January	May only be imported from Zimbabwe in accordance with, and under authority of, a licence issued by the DG, Department of Agriculture, Marketing Administration, and a permit from the Directorate of Plant & Quality Control	Agricultural Pests Act No. 36/1983. Proc. 209/1966. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972. GN R. 1153/1966. Agricultural Pests Act No. 36/1983	Detain for PQC. Detain for PHO.
07.04	Cabbages, cauliflowers, kohlrabi, kale and similar edible brassicas, fresh or chilled:			Detain for PQC. Detain for PHO.
07.05	Lettuce (*Lactuca sativa*) and chicory (*Cichorium* spp.), fresh or chilled			Detain for PHO. Detain for PQC.
07.06	Carrots, turnips, salad beetroot, salsify, celeriac, radishes and similar edible roots, fresh or chilled			Detain for PQC. Detain for PHO.
07.07	Cucumbers and gherkins, fresh or chilled			Detain for PQC. Detain for PHO.
07.08	Leguminous vegetables, shelled or unshelled, fresh or chilled	Subject to an MMA permit (Minimum Market Access) from the Department of Agriculture, Marketing Administration	GN 18405/1997	Detain for PQC. Detain for PHO.
07.09	Other vegetables, fresh or chilled			Detain for PQC. Detain for PHO.
07.10	Vegetables (uncooked or cooked by steaming or boiling in water), frozen	Subject to an MMA permit from the Department of Agriculture, Marketing Administration	Agricultural Pests Act No. 36/1983. GN 18405/1997	Detain for PHO. Endorse permit. Detain for PQC.
07.11	Vegetables provisionally preserved (for example, by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions) but unsuitable in that state for immediate consumption		Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PHO
07.12	Dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared	Subject to an MMA permit from the Department of Agriculture, Marketing Administration	GN 18405/1997. Agricultural Pests Act No. 36/1983	Endorse permit. Detain for PQC.
07.13	Dried leguminous vegetables, shelled, whether or not skinned or split	May only be imported under the authority of permits from the DG, Department of Agriculture, Marketing Administration and the Directorate of Plant & Quality Control Subject to an MMA permit from the Department of Agriculture, Marketing Administration	Act 59/1968. Proc. R. 1978/1987. GN R. 1967/1964. GN R. 18405/1997. Trade Metrology Act No. 77/1973. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO. Endorse permit.

Heading	Designation of goods	Prohibition and restriction	Authority	Action required
07.14	Manioc, arrowroot, salep, Jerusalem, artichokes, sweet potatoes and similar roots and tubers with high starch or inulin content, fresh, chilled, frozen or dried, whether or not sliced or in the form of pellets; sago pith		Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.01	Coconuts, Brazil nuts and cashew nuts, fresh or dried, whether or not shelled or peeled		Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.02	Other nuts, fresh or dried, whether or not shelled or peeled		Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.03	Bananas, including plantains, fresh or dried		Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.04	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried		Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.05	Citrus fruit, fresh or dried	May only be imported from Zimbabwe during the months of June, July, August, September, October and November in accordance with and under authority of a licence issued by the DG, Department of Agriculture; Marketing Administration	Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972. GN R. 1967/1964	Detain for PQC Detain for PHO
08.06	Grapes, fresh or dried	Importation from Zimbabwe during December and January is prohibited except under an MMA permit from the DG, Department Agriculture, Marketing Administration and a permit from the Directorate of PQC.	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972. GN R. 1967/1964. Agricultural Pests Act No. 36/1983	Detain for PQC. Detain for PHO.
08.07	Melons (including watermelons) and papaws (papayas), fresh		Agricultural Pests Act No. 36/1983. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PHO. Detain for PQC.

Heading	Designation of goods	Prohibition and restriction	Authority	Action required
08.08	Apples, pears and quinces, fresh	May only be imported from Zimbabwe during January, February, March and April under authority of a licence from the DG. Department of Agriculture, Marketing Administration and a permit from PQC. PiaII may only be imported from Zimbabwe from 1 to 31 January under authority of a licence issued by the DG, Department of Agriculture, Marketing Administration and a permit from PQC.	Agricultural Pests Act No. 36/1983. GN R. 1967/1964. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972. Agricultural Pests Act No. 36/1983. GN R. 1967/1964. Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.09	Apricots, cherries, peaches (including nectarines), plums and sloes, fresh	Peaches and plums may only be imported from Zimbabwe from 1 November to 31 December under authority of a licence issued by the DG, Department of Agriculture, Marketing Administration and a permit from the Directorate of PQC.	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972. Or. 11/1927. Agricultural Pests Act No. 36/1983	Detain for PQC. Detain for PHO.
08.10	Other fruit, fresh		Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.11	Fruit and nuts, uncooked or cooked by steaming or boiling in water, frozen, whether or not containing added sugar or other sweetening matter		Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.12	Fruit and nuts provisionally preserved (for example, by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions), but unsuitable in that state for immediate consumption		Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	Detain for PQC. Detain for PHO.
08.13	Fruit, dried (excluding that of headings numbers 0801 to 0806); mixtures of nuts or dried fruits of this chapter	Must be in the net mass quantities prescribed. Subject to an MMA permit from the DG, Department Agriculture, Marketing Administration and Directorate, PQC	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972. Agricultural Pests Act No. 36/1983. Proc. R. 1476/1986. GN 18405/1997.	Detain for PQC. Detain for PHO. Endorse permit. Detain for Customs.
08.14	Peel of citrus fruit or melons (including watermelons), fresh, frozen, dried or provisionally preserved	Must be in the net mass quantities prescribed. Peel provisionally preserved in sulphur water or brine or other preservative need not be detained for PQC. The introduction of citrus peel into South Africa is subject to an inspection and written release by the Directorate, PQC	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972. Agricultural Pests Act No. 36/1983	Detain for PHO.
09.04	Pepper of the genus Piper; dried or crushed or ground fruits of the genus Capsicum or of the genus Pimenta		Agricultural Pests Act No. 36/1983	Detain for PHO. Detain for PQC.
09.05	Vanilla		Foodstuffs,	Detain for PHO.

Heading	Designation of goods	Prohibition and restriction	Authority	Action required
09.06 09.07 09.08	Cinnamon and cinnamon-tree flowers Cloves (whole fruit, cloves and stems) Nutmeg, mace and cardamoms		Cosmetics and Disinfectants Act No. 54/1972. Agricultural Pests Act No. 36/1983	Detain for PQC.
09.09	Seeds of anise, badian, fennel, cumin, coriander, caraway or juniper	Importation is subject to permits from the DG, Department of Agriculture, and the Directorate of Plant & Quality Control	Proc. R. 284/1978. Agricultural Pests Act No. 36/1983.	Detain for PHO. Detain for PQC.
09.10	Ginger, saffron, turmeric (curcuma) thyme, bay leaves, curry and other spices		Agricultural Pests Act No. 36/1983	Detain for PHO. Detain for PQC.
20.01 20.02 20.03 20.04 20.05 20.06	Vegetables, fruits, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid Tomatoes, prepared or preserved otherwise than by vinegar or acetic acid Mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen Vegetables, fruit, nuts, fruit-peel and other parts			Detain for PHO.
20.07	Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes, being cooked preparations, whether or not containing added sugar or other sweetening matter	Must be in the net mass quantities prescribed	Agricultural Pests Act No. 36/1983. Proc. R.55/1964. Trade Metrology Act No. 77/1973	Detain for PQC. Detain for PHO.
20.08 20.09	Fruits, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter			Detain for PHO.

Source: South African Revenue Services, Consolidated List of Prohibited and Restricted Imports.

Other regulations on processed fruit and vegetables can be found at the following links:

Draft regulations relating to trans fats in foodstuffs - R.249/30 March 2010
http://www.doh.gov.za/docs/regulations/2010/reg0249.pdf

Regulation relating to food colourants
http://www.doh.gov.za/docs/regulations/1996/reg1008.pdf

Regulation relating to the use of sweeteners in foodstuffs
http://www.doh.gov.za/docs/regulations/1991/reg3128.pdf

Regulations related to the use of sweeteners
http://www.doh.gov.za/docs/regulations/2008/reg0125.pdf

- Regulation governing emulsifiers, stabilisers and thickeners and the amounts thereof that foodstuffs may contain,
  http://www.doh.gov.za/docs/regulations/1987/reg2527.pdf

- Acids, bases and salts – the amounts thereof that foodstuffs may contain
  http://www.doh.gov.za/docs/regulations/1986/reg0115.pdf

- Regulation: preservatives and antioxidants: amendment
  http://www.doh.gov.za/docs/regulations/2009/reg0060.pdf

- Regulations – restriction on the sale of food additives containing nitrite and/or nitrate and other substances
  http://www.doh.gov.za/docs/regulations/1975/reg0219.pdf

- Regulations relating to foodstuffs for infants, young children and children
  http://www.doh.gov.za/docs/regulations/1984/reg1130.pdf

- Regulations relating to Foods for Infants, Young Children and Children: Amendment
  http://www.doh.gov.za/docs/regulations/2006/reg0734.pdf

A Pest Risk Assessment (PRA) is required for imports of fresh fruits and vegetables…

Before the Department of Agriculture, Forestry and Fisheries can issue an import permit for fresh fruits and vegetables, a Pest Risk Assessment (PRA) based on scientific data must be conducted and specific conditions set according to the phytosanitary risks involved.

3.2. Freight forwarding and other transport requirements

Fresh fruits and vegetables are transported by air and require the maintenance of a cold chain…

Given the relatively short shelf life of fresh fruits and vegetables, retailers tend to purchase their requirements direct from suppliers. Most often, fresh produce is flown in either daily or twice daily for delivery to central distribution depots from where it is transported by road to retail stores.

Fruits and vegetables require special treatment in that the maintenance of the cold chain is essential. Companies dealing in these products require refrigerated warehouses and transport.

Imports by sea are cleared through the ports of Cape Town or Durban. Products destined for Gauteng are generally taken to Durban, the port closest to Johannesburg, the capital of Gauteng. It is important to understand that Gauteng is South Africa’s consumption hub and most imported food products will ultimately end up in the province.

Fresh produce airfreighted to South Africa is usually consigned to OR Tambo International in Gauteng.

Imports arriving by road are subject to high transport costs…

Imports from southern Africa entering the country by road may be at a disadvantage as the cost of road transport both internally and regionally is very high and often has the effect of making prices uncompetitive.

3.3. Labelling requirements

The Foodstuffs, Cosmetics and Disinfectants Act of 1972 governs the labelling and advertising of foodstuffs, and its regulations have been in place for many years. They are very specific on such matters as the name of the foodstuff, size of lettering, prohibited statements, ingredients, nutritive value claims, and nutrition information format. Any pre-packaged foodstuff imported into or consigned to any place in South Africa must bear a label carrying the particulars specifically required by the Act or its regulations.

New regulations (as an amendment to the Act) on the labelling and advertising of foodstuffs have recently been published in the *Government Gazette* of 1 March 2010 (Government Notice R. 146). They give clear guidance on dos and don'ts in the provision of information on labels and in food advertising. Manufacturers of foodstuffs, both domestic and international, must conform to these requirements. Implementation will take effect 12 months from the date of publication, i.e., on 1 March 2011.

Among the key points in the new regulations are the following:

- Labels should be in English and, where possible, at least one other official language of South Africa.
- Labels should have information on the country of origin, and labels of all imported food products must carry the entry “Product of......”
- Labels must carry the name of the foodstuff, the name and address of the manufacturer, instructions for use where appropriate, a list of ingredients, and information on special storage conditions and net contents.
- Containers must contain a date marking which must be preceded by the words “Best before” or “Sell by”.

The full regulation can be downloaded at the following link:

www.doh.gov.za/docs/regulations/2010/reg0146.pdf

4. Expected market developments

There are a few trends and growth areas in the food and beverage market that point the way to future opportunities for suppliers....

Consumers are looking for convenience foods…

The search for convenience, health and freshness is a huge trend among food consumers, and both manufacturers and retailers are moving to address the demand thus created by introducing “healthy meals for busy people”. The products include ready-made vegetable and fruit salads, and “spice packs” containing all the spice ingredients necessary to make a variety of curries.

In 2008, Pick ’n Pay carried out a massive re-branding. The campaign included the launch of over 450 new and repackaged lines in its “Fresh” range, including over 300 ready-to-eat (convenience) meals, over 80 fresh produce lines, and more than 50 new meat products.

…as well as for healthy “ripe and ready” avocados and other fruit…

Over the past decade, the increased buying power of South African consumers has created a larger consumer market for avocados. There is also growth in the niche market for “ripe and ready” fruit, and the market for “ripe and ready” avocados has grown as consumers become more and more aware of the health benefits offered by this fruit. Because of these factors, it is believed that the market can absorb an increasing volume of avocados, provided the price is right.

Sales of organic food are rising and retailers have been capitalizing on the trend…

The South African market for 'green' products is expanding quickly, albeit from a low base, and this growth is expected to continue into the foreseeable future. Acknowledging the trend, Woolworths widened its organic offering from a little more than 10 to over 150 lines within a recent twelve-month period. Pick 'n Pay is another major retailer moving towards an extensive organics range.

Retailers have been turning to the use of private labels to focus attention on their merchandise…

Private labels are growing in popularity and importance in the South African retail sector. Spar has the highest share of the private label domestic retail market, and it is also the fastest growing private label retailer in the country.

The company has over 800 exclusive products carrying the Spar brand. The focus is on "interesting and exciting" ranges that provide more convenience as well as affordable options for special meals and everyday entertaining. Therefore in addition to basic products such as milk, cheese, meat, edible oils, flour and canned foods, Spar is moving towards a differentiated offering of such items as home replacement meals and desserts.

Pick 'n Pay is also increasing its range of branded products for home use at a rapid rate.

The buying power of the expanding food service industry should not be ignored…

The food service industry in South Africa is well developed and is the fastest-growing sector of the food market, fuelled by increased household incomes, a growing middle class and tourism. There are around 25,000 outlets consisting of hotels, restaurants, fast-food franchises and contract catering companies. The industry is often overlooked by foreign suppliers, but its buying power cannot be ignored.

5. The domestic market: a micro view

5.1. Key market players

5.1.1. Retailers

The food retail sector in South Africa is concentrated in a handful of large groups that account for over 60% of retail sales in the formal sector. These large retailers have dedicated fresh fruit and vegetable store sections and sell a wide range of processed fruit and vegetable products and nuts.

Some of the fresh fruits and vegetables, dried fruits and nuts are sold “loose”, and customers select their requirements and have them weighed and priced at in-store weighing stations. Other products are packed under house labels or under the brand name of the supplier. The latter is particularly true of processed foodstuffs.

The key retailers contract local growers directly and have procurement and distribution divisions that are responsible for sourcing all their requirements for fresh fruits and vegetables. They sometimes make use of independent importers to handle imports of fresh produce.

Information on some of the country’s biggest retailers is provided below.

PICK’n PAY	
Turnover, 2009	R 49.9 billion (US$ 5.9 billion)
Market share	33.7%
Store types	152 supermarkets, 20 hypermarkets, 250 franchise outlets
Product range	Full range of groceries, confectionery, bakery, fresh/frozen fruits and vegetables, processed foods, fresh/chilled/frozen meat and fish.
Best practices	Pick ’n Pay has enormous buying power and it uses this to forge agreements with local growers and agents to ensure that it has a wide range of fresh produce available all year round. Pick ’n Pay is also leading the organic race in South Africa and is increasingly offering consumers a choice of organic produce.
Consumer demographics	Wide-ranging: the group caters for Living Standards Measure (LSM) groups 4 to 10. Competes on price and “the shopping experience”.
Buying practices	Pick ’n Pay has contracts with a number of selected suppliers/growers of fresh fruits and vegetables. They are required to supply Pick ’n Pay’s needs for the contracted period and it is their responsibility to enter into subcontracts with smaller growers or to import fruits and vegetables when necessary. All subcontracted suppliers must provide Pick ’n Pay with an import certificate when imports have been required. Pick ’n Pay generally purchases processed goods on a decentralized basis, which means that buyers in each of its six main regions purchase products for their respective retail outlets. Pick ’n Pay prefers to deal with a local importer or agent rather than directly with foreign suppliers; local importers are required to maintain certain levels of stock.

SHOPRITE HOLDINGS LTD	
Turnover, 2009	R 59.3 billion (US$ 7.0 billion)
Market share	31.7%
Store types	383 Shoprite supermarkets in 17 countries, 134 Checkers Supermarkets, 24 Checkers Hypers, 154 Usave stores, 31 OK Minimark convenience stores, 22 OK Foods supermarkets, 73 OK Grocer stores
Product range	Full range of groceries, confectionery, bakery, fresh/frozen fruit and vegetables, processed foods, fresh/chilled/ frozen meat and fish.
Best practices	Freshmark, the Group's fruit and vegetable procurement and distribution arm, has become the biggest operation of its kind in Africa. It distributes R 2.41 billion (US$ 285 million) worth of produce yearly. It offers the Group's retail outlets 440 product lines, of which some 259 000 tons were distributed in 2008. New product lines generally revolve around organic goods, and Freshmark has more than 70 organic products available throughout the year. Freshmark's strength is its focus on procuring quality produce at the best prices. Its buyers work closely with producers in Africa to stock the Shoprite network across the continent. Regular visits to producing farms ensure adherence to agreed food safety standards and other specifications. Independent laboratories perform ongoing testing to ensure that world-class food safety standards are met.
Consumer demographics	Traditionally middle to lower end although the company is actively moving to service LSM groups 8-10.
Buying practices	Just over 95% of all fruits and vegetables sold through Group outlets were obtained directly from 550 growers in South Africa in a recent year. Given the profile of Shoprite shoppers, the company does not sell many imported items. When the company does look at imported products, it prefers to deal directly with the foreign supplier as this helps to keep costs down.

SPAR	
Turnover, 2009	R 32 billion (US$ 3.8 billion)
Market share	26.9%
Store types	Spar retailers are independent store owners. In total, there are 239 Superspar, 460 Spar, and 147 Kwikspar outlets.
Product range	Full range of groceries, confectionery, bakery, fresh/frozen fruits and vegetables, processed foods, fresh/chilled/frozen meat and fish. Fresh fruits and vegetables are branded under the Spar label "Fresh Lines". The individual Spar stores also buy fresh fruits and vegetables directly from local producers and suppliers.
Best practices	Spar stores differ dramatically from location to location, with each store seeking to cater to the needs of its specific clientele. Stores in upmarket areas often have a wide range of imported products on their shelves and tend to stock a broader range of fruits and vegetables including imported out-of-season products.

Consumer demographics	Depends on the location but generally caters to the more affluent consumer. The company is actively pursuing low-end consumers by opening stores in rural areas.
Buying practices	Spar buys through a number of selected suppliers, including both growers and middlemen. It does not import any fruits and vegetables directly and its suppliers buy imported/out-of-season fresh produce from fresh produce agents and markets. In the processed fruits and vegetable sector, Spar purchases and distributes on a decentralized basis through six Spar distribution centres. The only buying decision made centrally covers Spar's branded products. Although the company does not have a specific preference for dealing with local agents, it regards this as the easier alternative. Given the independent nature of Spar stores, store owners frequently buy imported goods from local importers and distributors.

WOOLWORTHS	
Turnover (food), 2009	R 11 billion (US$ 1.3 billion)
Market share	9.2% in foodstuffs
Store types	250 corporate stores and 160 franchise stores. Corporate stores are generally department-type stores with a food market. Speciality food stores are either Woolworths-owned or franchised.
Product range	Premium products. Most of its goods and all its fruit and vegetable products are marketed under the Woolworths brand.
Best practices	Sells a limited range of high-quality speciality products supplied by both local and international suppliers. These foods are all labelled with the Woolworths brand. The brand is environmentally kind and the company looks for green products that can be part of its Good Business Journey. Woolworths's policy is to keep imports to a minimum in order to reduce its carbon footprint.
Consumer demographics	Upmarket
Buying practices	Woolworths subcontracts the procurement of fruits and vegetables to a handful of suppliers and importers, who source fresh fruits for the Woolworths group from a variety of local and international origins. Woolworths tries to ensure a continued supply of certain out-of-season fresh produce including avocados, citrus fruit and strawberries. It also procures specialist products such as dried apricots from Turkey, Sharon fruit from Israel, and baby corn and mangetout from Kenya. Processed goods need to be packed and labelled under the Woolworths brand. Woolworths has rigorous supply criteria, the application of which is handled by individual buyers at the head office.

FRUIT & VEG CITY	
Turnover (food), 2009	R 2.1 billion (US$ 284 million)
Market share	Fruit & Veg City is the largest specialist retailer of fruits, vegetables and other fresh produce in South Africa.
Store type	It has over 100 stores nationwide. About two thirds consist of franchises, with an average of 15 new stores opening per year.
Product range	Fresher Food Stores form the core of the business; these retail basic fresh produce. Food Lover's Markets are upmarket food emporiums which also offer a range of other specialist products. Freshstops are free-standing outlets which focus on fresh, healthy take-away meals and smoothies. Express Freshstops can also be found in many of the Fresher Food Stores or Food Lover's Markets.
Best practice	Insists on quality produce for all consumers
Consumer demographics	Depends on the location of the outlets
Buying practices	Both growers and agents are used to supply a full range of fresh produce.

5.1.2. Speciality stores and wholesalers

Outside of the outlets owned by large retailers, there are a few **speciality fruit and vegetables shops** which are independently owned and managed. These outlets get their requirements direct from the fresh produce market on a daily basis.

Fruits and vegetables are also sold extensively by **street vendors** in the major cities. Again, this produce is procured daily from the fresh produce market. The fruits and vegetables sold through this channel are locally grown.

Processed products such as canned fruits and vegetables, fruit juices, packaged nuts and packaged spices are also sold through **smaller Seven-11 type stores** and through **Spaza shops** (informal convenience stores, usually run from home). These outlets obtain their requirements from large wholesalers such as Makro, Metcash and Trade Centre (part of Metcash). Certain imported products enter this end of the market direct from the wholesalers.

Spices are often sold "loose" at weekend markets in and around the major cities and through **specialist spice outlets**. These outlets are largely run and managed by the traders bringing in the spices, predominantly from India.

Fruit Spot is a large **wholesale distributor** of fruits and vegetables, including prepared products such as salads. It outsources the procurement of the bulk of its produce to fresh produce market agents. About 60% of its distribution business is with the retail trade, 10% with manufacturers and 30% with the hospitality/ catering sector.

5.1.3. Importers

There are a few dedicated importers of fresh fruits and vegetables. A company called Fruits imports fresh fruit specifically for the Woolworths Group from a variety of international origins. Peninsula Horticulture is a fresh produce marketing and processing company whose core business is supplying exotic vegetables and fruits to Woolworths. It is the largest supplier of fruits, vegetables, salads and organic produce to this retailer. It also has a wholesale and catering business which offers a range of exotic fruits and vegetables in pre-pack or bulk form to the catering trade.

Fresh produce market agents, which handle high enough volumes to justify imports, are significant importers of fruits and vegetables. The agents include RSA Market Agents and Subtropico. Subtropico represents 600 producers and has an annual turnover of R 900 million (US$ 106 million). The company markets over 200 different fresh products.

A number of specialist food importers in South Africa cater to the retail and wholesale sectors. Patleys is perhaps the best known. Part of the Bidvest Group, Patley's is an importer and distributor of quality food products. It deals with all the major chain stores in South Africa as well as independent retailers and the food services sector.

Patleys generally deals in premium brands. In addition, it offers own brand – GoDCrest – of canned and bottled fruit and vegetable products. GoDCrest products are sourced from around the world.

Food Import and M&L Distributors import canned prepared peas and beans which are then re-labelled and sold through retailers. Mistros Catering Supplies imports and distributes dried fruits, fruit juices, nuts, and canned fruit and vegetables to the food service sector.

Nuts are generally handled by specialist importers. These importers import, process and pack nuts for sales to the food processing, restaurant and catering, or retail trade. They may import for a client who requires a particular range of nuts for a product it manufactures. Or they may import a wider range of nuts to offer to their general client base.

5.1.4. Food processors and packers

Food processors and packers offer a good opportunity for foreign suppliers of certain products.

Generally, fruit and vegetable packers use only local produce. They enter into direct contracts with local growers who satisfy their requirements. Where imports are required, specialist importers buy the finished product.

Fruit juice manufacturers import grape and apple juice for blending with their own fruit juices.

Spices are imported by flavour houses and ingredient suppliers. These traders may have contracts with clients who require a specific range of spices for products they manufacture. Or, the traders may require a far wider range of spices to offer their client base.

There are also a number of specialist spice importers who import a wide range of spices which they offer to the trade. In all cases, the importers process the spices to a certain extent before selling on to wholesalers or to end-users. These end-users are mainly manufacturers of food products.

There is also an opportunity to supply the large spice companies such as Robertson's, who import their spice requirements direct from international suppliers. Robertson's also purchases selected requirements direct from South African importers and distributors.

For dried legumes, imports are initiated either through specialist traders and importers or by the packers and canners themselves. The packers and canners generally use the specialist importers and traders for imports from foreign countries where they do not have long-standing contacts. They will go direct to source and import on their own account in countries where they have good contacts.

Soup and condiment manufactures also import dehydrated vegetables, specifically onions, either directly or through one of the flavour houses.

Cereal and chocolate manufacturers such as Beacon, Bokomo, Cadbury's and Nestlé import nuts directly for use in chocolates, muesli and other food products.

5.2. Procurement practices

Most fresh produce is obtained locally, but imports of off-season and counter-season fruits and vegetables are gaining ground.

Most fresh fruits and vegetables are sourced from local producers. Generally fruit is imported during the off-season and the buying decision will be based on out-of-season availability in the supplying country, product quality and the duration of transport.

The establishment of Pest Risk Assessment procedures with South Africa at the government-to-government level is essential for any trade in fresh produce to take place.

Another important consideration is whether the supplying country has arrangements for Pest Risk Assessments in place with South Africa. These assessments can take from six months and more to obtain and the procedures need to be established at government-to-government level. This is a critical issue for African exporters wanting to penetrate the South African market, as a PRA is essential for any import trade in fresh fruits and vegetables to take place.

Before a product can be ordered or sold through any of the major retail outlets, the supplier and the product need to be listed with the retail company. This often complicated procedure can be simplified by using a local agent or distributor. A local agent or distributor can also check on merchandising within stores to ensure that the product is not relegated to the bottom shelf.

The processed food sector in South Africa has become increasingly competitive with many international brands and products entering the market. Retailers and importers look for products that are different or that compete with existing basic products on price.

Spice importers require whole, raw spices and prefer to deal with suppliers who can provide a range of spices rather than just a single one…

For imports of spices, price is the primary consideration in the purchasing decision, followed by quality and the ability to deliver on time and according to specifications. In a market where there are numerous players competing for the same business, importers and distributors need to be able to rely on their international suppliers to deliver on time and according to specifications. Spice importers also tend to look for international suppliers that offer a range of spice products and not just a single item.

In most cases, importers require spices in their whole, raw form which are then cleaned, milled, blended and packed in South Africa. This is largely the result of problems in the past with unscrupulous suppliers who mixed crushed and milled products with fillers and thus provided an impure product.

Dried legumes are imported from November to March in 50 kg bags for further processing in South Africa…

The import market for dried legumes, particularly dried beans, is highly seasonal. The South African growing season is from April to November. From November to March there is generally a shortage and imports are required. As a rule, dried legumes are imported in 50 kg bags for further packing and processing in South Africa. South African importers demand a good quality grade of dried legumes and competitive pricing levels. Reliability and a consistent source of supply are also important factors influencing buying decisions.

Nuts are generally imported shelled and in bulk…

For nut imports, price and quality are key in the purchasing decision. In most cases importers require bulk edible nuts which are then processed and packed at local facilities. Much of the nuts purchased in South Africa is of the shelled variety. Both importers and food processors buy bulk nuts for processing or packaging.

E-procurement is the name of the game…

The large retailers and wholesalers conduct business with their suppliers electronically. ICT (information and communications technology) systems link all players to stores for automatic ordering. The Shoprite Group has dedicated supplier portals and uses a TradeStone system for global sourcing. Electronic Shelf Labelling systems are also becoming more common and a number of high profile trials are taking place.

5.3. Consumer preferences

The bulk of retail sales is made to people at the price-sensitive though quality-conscious lower- and middle-income levels, but the market for a wider range of more sophisticated goods is expanding among the more affluent segments of the population.

The opening up of the South African economy over the past decade and a half has had a profound effect on the food and beverage market. With the expansion of the middle- and upper income groups and the rise of tourism, the market has become increasingly sophisticated.

The development of the black middle class in particular has created a demand for a wider range of products both on supermarket shelves and in restaurants. The growth of tourism to and from South Africa has fuelled a rise in demand for more variety in the food on offer from the food service industry. As South Africans travel, their taste in food becomes more sophisticated and incoming tourists demand a greater mix in the food available to them locally.

The South African market is a strange mix of first and third world. Although consumers demand quality, they are also price conscious. This is evident in the fact that much of the volume of sales in the retail sector is made to the middle- to lower-income groups.

The lower end of the market is extremely price sensitive and most imported foodstuffs would not be marketed at this level. The exceptions would be basic food items like dried beans or lentils.

The middle- and upper-income groups are more like European or North American consumers. They are sophisticated, well-travelled and have an appetite for foreign tastes and flavours. They are less price sensitive as far as luxury products are concerned and would be a target for imported out-of-season fruits and vegetables, packaged nuts and exotic spices. As consumers at these income levels demand variety, retailers catering to their needs tend to have a wide range of products available.

6. Case studies: Woolworths and Shoprite-Freshmark

Both Woolworths and Shoprite-Freshmark import out-of-season and counter-season products, but the expansion of their import trade with African exporters is impeded by problems in obtaining sanitary and phytosanitary (SPS) permits for African produce. Freshmark advises exporters to lobby their Governments to address regional SPS requirements as this will go a long way to unblocking the South African market.

Woolworths

Woolworths, a retailer based in South Africa, is a leader in providing fresh, quality foods to discerning customers. The group sells through numerous store formats including food halls in its department stores, stand-alone food stores and smaller food outlets in convenience stores in the forecourts of petrol stations. Regardless of the format, all stores are stocked with products carrying the Woolworths brand; these include a wide range of fresh fruits and vegetables, processed products, packaged spices and nuts.

Around 90% of the fresh fruits and vegetables sold through Woolworths stores is sourced locally. The remaining 10% is imported. A visit to a Woolworths store will reveal a range of imported produce, including grapes from Spain and Egypt, avocados from Spain, strawberries from Egypt and baby vegetables from Kenya and Zambia.

While South Africa is fairly self-sufficient in fruits and vegetables, there is a gap in domestic supplies during the off-season which Woolworths tries to fill with suitable imports. This is a fairly new phenomenon in South Africa and can be attributed to the fact that people are becoming more sophisticated and global in their buying patterns. The company also procures specialist products on an ongoing basis such as Sharon fruit or shitake mushrooms, which are not grown locally.

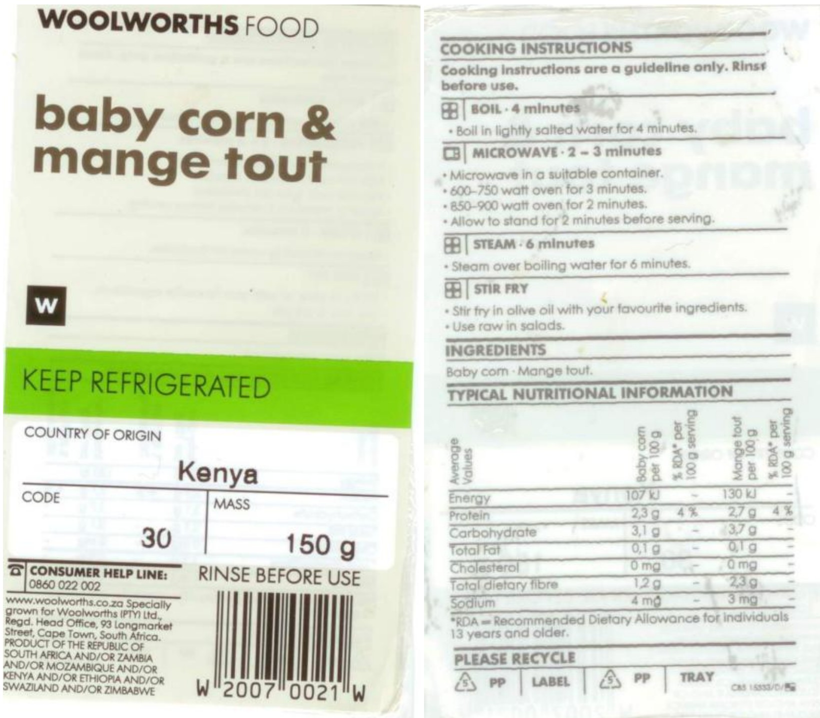
Woolworths subcontracts the procurement of fruits and vegetables to a handful of suppliers and importers, who source fresh fruit from a variety of domestic and international origins.

Two of Woolworth’s key fresh produce suppliers are Peninsula Horticulture whose core business is supplying local and exotic fruits, vegetables, salads and organic produce to retailers, and Fruits, which imports fresh fruit for the Woolworths group from a variety of international origins. In both cases, Woolworths specifies the product it is looking for and works with the importer to ensure that the supplier meets the Woolworths supplier criteria. Woolworths is extremely quality conscious and the company has rigorous selection criteria for foreign suppliers whom the company then ties into long-term supply agreements

The fresh produce is flown in either daily or twice-daily, delivered to the central distribution depots from where it is delivered by road to stores. Woolworths has subcontracted all its refrigerated transport to a company called Fast ’n Fresh which is part of the Imperial Group.

Woolworths is a good corporate citizen at a number of levels. Together with its suppliers, it launched the Farming for the Future initiative in November 2009 which aims to ensure that South Africa will be able to sustain sufficient growth of fresh produce in the long term. The initiative is geared to radically improving soil and plant health, preserving resources like water and soil, and protecting biodiversity. Initial trials under the initiative show an improvement in the consistency of yields and quality as well as a reduction in usage of pesticides and fertilizers.

Currently, more than 50% of Woolworth's fresh produce is farmed according to the directives of the initiative, and the new farming techniques will be put in place in all of Woolworths supplier farms around the country. Woolworths intends to have all its locally grown fresh goods either organically produced or grown according to the Farming for the Future approach by 2012.



A typical Woolworths label: the front and back of the label for fresh vegetables imported for Woolworths

Shoprite Holdings – Freshmark

The Shoprite Group is Africa's largest food retailer. It operates 1 146 corporate and 276 franchise outlets in 16 countries across Africa and the Indian Ocean Islands, and had a reported turnover of R 59.3 billion (US$ 7.0 billion) in the 2008/09 financial year. Shoprite stores sell a full range of food and beverage products, including fresh fruits and vegetables and processed products.

Shoprite Group carries numerous sub-brands, each with its own market positioning, consumer profile and shopping experience. The best known to African developing countries would be the Shoprite brand as this is principally the brand used for expansion into the rest of Africa.

The fresh produce division of the Shoprite Group is called Freshmark. Freshmark is responsible for the procurement and distribution of all fresh produce from the Group's six distribution centres to 535 Checkers and Shoprite supermarkets, and Checkers Hyper stores. A fleet of more than 120 refrigerated trucks are used to deliver produce to these stores on a daily basis. With this infrastructure, Freshmark is one of the largest buyers of fresh produce in South Africa.

The company imports a wide range of counter-season fresh produce. Among the imports are bananas, avocados and baby vegetables. Quality, price and seasonal availability are the primary factors in the purchasing decision.

Despite the company's footprint in the rest of Africa, Shoprite currently imports very little from the continent. This is because it is unable to obtain SPS permits for African produce in the absence of PRA arrangements.

The South African Department of Agriculture is particularly strict in preventing the entry of any agricultural product that may pose a risk to South African production. Poor in-country monitoring in a number of African countries and the lack of a reliable capacity to apply SPS requirements contribute to the problem. The fact that regional SPS standards have yet to be established and ratified exacerbates the situation. Until all these constraints are addressed, the company is not expected to be able to import produce from Africa.

Given the commitment of the Shoprite Group to Africa, Freshmark would be interested in importing produce from the continent on a counter-seasonal or high demand basis. It is aware that Zambia's watermelons are counter-seasonal, but it has been unable to obtain import permits for this fruit.

Freshmark's advice to exporters is to lobby their Governments to address regional SPS requirements as this will certainly go a long way to unblocking the South African market.

7. Niche markets and product groups to be targeted

The markets for out-of-season and counter-season fruits and vegetables, raw materials for the processing sector, products carrying private or own-labels, and spices offer possibilities for the African exporter.

Out-of- season and counter-season fruits and vegetables. The obvious opportunity for exporters in developing countries lies in the supply of out-of-season or counter-season fruits and vegetables. Among the imported counter-season fruits are citrus (currently sourced from Israel, Spain and Egypt), avocados (primarily from Spain), grapes, stone fruit (Spain) and bananas (Mozambique).The key buyers indicate that bananas and avocados possibly offer the best immediate opportunity for African developing countries. There are also opportunities for watermelons and fine vegetables (long-stem broccoli, fine beans, snap peas, mangetout, and baby corn).

Raw materials for the processing sector. The bulk of South Africa's agri-food imports consists of raw materials for processing. These imports may be seasonal and import volumes depend on the success of the domestic crop. The imports are handled either by the large commodities traders who then sell to the local markets, or by the larger manufacturers who may procure direct from international suppliers where large volumes are required.

South African importers demand good quality, consistent and reliable supply, and competitive pricing levels. Opportunities exist for dehydrated legumes, dehydrated vegetables for use in soups and stocks, and nuts. Large quantities of dried beans (red speckled) are required yearly, and currently these are sourced primarily from China and on the basis of price. African exporters would need to be able to compete with China to penetrate this South African market.

Private labels. The South African market for products carrying private or own-brand labels is far from saturated. Private labels offer retailers an opportunity for differentiation in an increasingly competitive situation and the number of products with private labels is rising rapidly. Products that could be targeted for private labels include canned vegetables, canned beans, counter-season fruits, fine vegetables and spice mixes. Opportunities can be realized only if prospective suppliers are able to establish close working relationship with retailers and gain an understanding of their specific requirements and pricing points.

Examples of products carrying private labels

Spices. South Africa imports virtually all of its requirements for spices. Currently most spices are obtained from India and trading relationships are well established. There is an opportunity for African exporters to break into this market in a meaningful way, but they must be in a position to offer what the market requires. Spice importers report that they will not deal with companies offering only a single product. Spice exporters therefore need to put together a package with which to approach the South African market.

8. Integration of exporters into the overall value chain

Most imports currently consist of unprocessed or raw products for further processing and packing. This is where the immediate opportunity lies. For the future, exporters should target the market for value-added products.

Agri-food products are imported all the way along the value chain—from basic inputs for the food processing industry through to packaged processed products ready for retail sale. However, the bulk of imports consists of unprocessed or raw products for further processing and packaging in South Africa: this is where the immediate opportunity lies.

For the future, it would be important to target and work with importers and retailers of value-added products as exports to this sector will push development of value-added products in the developing country concerned.

9. Recommendations for exporters from African developing countries

To unlock the market, it is essential to carry out national campaigns to break the awareness barrier and to make exporters and their products known in South Africa; for exporters to conduct face-to-face meetings with South African importers; and most importantly, to sort out at the government-to-government level PRA and SPS issues.

The research for this paper has highlighted two key barriers to trade between South African companies and exporters in other African countries. On the part of the South Africans, the barrier is a lack of awareness that African exporters can supply them with agri-food products. For African exporters, the barrier is their inability to meet the requirements for obtaining SPS permits, which are essential to doing business with South Africa.

The major South African retailers and importers are simply unaware of the potential of African developing countries as sources of supply. They have no knowledge of the products on offer, the companies that are exporting them or the volumes available. Sadly, the situation has not changed from a decade ago when a similar study reached the same conclusion. Obviously, a marketing opportunity has been missed.

In addition to a national marketing effort, there is a need for individual exporters to engage with buyers on a personal basis to let them know what products are available at what price points, and what the product specifications are. Where possible, samples of products should be shown to key buyers.

Buyers have indicated that they have no problem buying from African developing countries provided the products meet company specifications and pricing points. Consistency and reliability are also important to success. Too often the story is told of the sample that was exactly what was required but which bore no resemblance to the product when it arrived.

The second barrier relates to the absence of Pest Risk Assessment procedures and the resulting inability to obtain SPS permits for fresh produce sourced in Africa. Until this issue is resolved, the best marketing efforts are not going to unlock the South African market.

The problem has to be sorted out at the government level with the South African Department of Agriculture. Developing country exporters need to lobby their national Departments of Agriculture to open the lines of communication and put PRA procedures in place.

The volumes required by South African importers are large and this may exclude some developing country exporters from the market. It may be worthwhile for these exporters to consider supplying one region or one province of South Africa with lower volume requirements. Alternatively, they could consider joining forces with other suppliers in their country to make up the required volumes.

The research findings for this report indicate that buyers rely on international trade shows and industry journals to identify new suppliers. South Africa has one yearly food and beverage fair; called Africa's Big Seven, the fair is attended by key industry players. A presence at this trade fair either through a national pavilion or as an individual company would be useful. Information is provided at www.exhibitionsafrica.com.

A subscription to South Africa's journal for the food and beverage industry, the *Food and Beverage Reporter* (www.developtechnology.co.za) would be a useful way of keeping up with trends and developments in the South African food sector.

Ultimately, a face-to-face meeting with buyers is the best way to do business in South Africa. Exporters who are serious about accessing the market need to go to the country to meet potential customers. A slick company presentation along with good samples, an accurate price list and notes on delivery times and capacities are essential marketing tools for such meetings.

10. Useful contacts

Company/government institution	Website	Telephone	Fax	E-mail	Contact	Activity
Government						
Department of Trade and Industry	www.dti.gov.za	+27 12 394 9500				
Department of Agriculture, Forestry & Fisheries	www.daff.gov.za	+27 12 319 6000				
International Trade Administration Commission (ITAC)	www.itac.org.za	+27 12 394 3590				
National Plant Protection Organisation of South Africa (NPPOSA)	www.daff.gov.za	+27 12 319 6396		anitas@daff.gov.za	Ms Anita Snyman	Responsible for Pest Risk Assessments
Private sector						
AG Morris International	www.agmorris.com	+27 21 511 4600	+27 21 511 4650	craig@agmorris.com	Craig, Imports Manager	Distributors of canned fruit and vegetables, fresh herbs
Bokomo	www.bokomo.co.za	+27 21 8648600		ggiani@pioneerfoods.co.za	Gino Giani	Manufactures mueslis and cereal bars
Cape Herb and Spice	www.capeherb.co.za	+27 21 701 5140		Farouk@capeherb.co.za	Farouk	Packs and markets a wide range of spices. Currently imports from European spice houses but keen to deal with Africa.
Caterplus	www.caterplus.co.za	+27 11 553 9600	+27 11 244 1926	charles.watt@caterplus.co.za	Mr. Charles Watt, Chief Buyer	Caterplus supplies groceries and vegetables to the catering, hospitality and food-service industry.
Crown National	www.crownnational.co.za	+27 11 201 9100	+27 11 201 9180	info@crownnational.co.za	Bernadette Chancellor, Spice Buyer	Food ingredient supplier importing spices.
DCL Food Distributors	www.dclfoods.co.za	+27 86 1325 3663		basil@dclfoods.co.za	Basil Schultz	DCL is a supplier of perishables and groceries to the hotel and

Company/government institution	Website	Telephone	Fax	E-mail	Contact	Activity
						catering trade.
Freddy Hirsch	www.freddyhirsch.co.za	+27 21 527 7600	+27 21 593 2104	shirene.hinscliff@freddyhirsch.co.za	Shirene Hinscliff, Spice Buyer	Food ingredient supplier importing spices.
Freshmark / Shoprite	www.shoprite holdings.co.za	+27 21 980 7000	+27 21 980 7090	janventer@freshmark.co.za	Jan Venter, Import Manager	Fresh produce division of the Shoprite Group.
Fruit & Veg City	www.fruitandvegcity.co.za	+27 21 532 5400	+27 21 532 5411	nkotze@fnv.co.za	Nico Kotze	The largest independent fruit and vegetable retailer
Fruits	www.fruits.co.za	+27 21 860 1800	+27 86 528 0473	ilza@fruits.co.za	Ilza Brandt	Imports fresh fruit for the Woolworths group.
Gourmet Food Distributors	www.gourmetfoods.co.za	+27 21 552 4346	+27 21 552 3877	grant@gourmetfoods.co.za	Grant Meyer	Distributors of a range of product lines including dried fruits, seeds and nuts, tinned foods, general catering lines, frozen chips.
M&L Distributors	www.distributors.co.za	+27 21 552 5190	+27 21 552 3609	anton@distributors.co.za; Liz@distributors.co.za	Anton Israele; Liz Taylor	M&L Distributors supplies a wide range of products to all of the major retail chains and independent retailers. It imports canned prepared peas and beans which are then re-labelled and sold through retailers.
Makro SA (Pty) Ltd	http://www.makro.co.za	+2711 797 0000	+27 11 797 0000			Makro is a large wholesaler of fast-moving consumer goods (FMCG) goods.
Metcash Africa	www.metro.co.za	+27 11 490 2289	n/a	ngriffin@metcash.co.za ; wvanderwalt@metcash.co.za ;	Nick Griffin; Willie Van der Walt	Metcash Africa is the largest distributor of FMCG on the African continent. The Group incorporates Metro Cash and Carry (159 stores), Trade Centre (15 stores) and the Friendly Grocer (93 distribution warehouses).

Company/government institution	Website	Telephone	Fax	E-mail	Contact	Activity
Mistros Catering Supplies	www.mistro.co.za	+27 11 989 9500	+27 11 989 9519	paresh@mistro.co.za	Paresh Mistry	Mistro Foods is a distributor of dried fruits, fruit juices, nuts, and canned fruit and vegetables to the food service sector.
Nestlé	www.nestle.co.za	+27 11 889 6000		Elise.vanheerden@za.nestle.com	Elise van Heerden	Manufactures chocolate and soups.
Pakco	www.pakco.co.za	+27 32 533 1050	+27 32 533 0724	ravig@pakco.co.za	Ravi Govendar	Food manufacturer focusing on spices. Imports a range of spices.
Patleys (Pty) Ltd	www.patleys.co.za	+27 11 226 8800	+27 11 837 0614	patleysjhb@patleys.co.za; con@patleys.co.za; marketing@patleys.co.za	Mr Masly Notrica, MD; Con De Smidt, salesman; Priscilla Wessels, Marketing Director	Patleys is a premier importer and distributor of quality food products.
Peninsula Horticulture (Pty) Ltd (trading as Fresh to Go)	www.freshtogo.co.za	+27 21 461 4966/7	+27 21 461 4954	glen@peninsulahorti.com	Glen Moore	A fresh produce marketing and processing company whose core business is supplying exotic vegetables and fruits to Woolworths.
Pick n Pay	www.pnp.co.za	+27 11 856 7000	+27 11 856 7000	iventer@pnp.co.za	Izak Venter,Senior Buyer of Fresh Produce	Major retailer
Rieses Food Import	www.rfi.co.za	+27 21 5519037	+27 21 5519057	isyf@rfi.co.za	Issy Franco	Rieses is an importer and distributor of speciality foodstuffs including canned prepared peas and beans which are then re-labelled and sold through retailers.
RSA Market Agents	www.rsa.co.za	+27 11 613 4391	+27 11 623 1932	paul@rsa.co.za;	Paul Visagie	Fresh produce agent trading on the four primary fresh produce markets.
Spar	www.spar.co.za	+27 31 508 5000	+27 31 508 5000	Troy.baron@spar.co.za	Troy Baron	Major retailer
Subtropico	www.subtropico.co.za	+27 12 460 9910	+27 12 460 9911	magda@subtropico.co.za	Magda Venter	Fresh produce agent for more than 600 producers

Company/government institution	Website	Telephone	Fax	E-mail	Contact	Activity
The Fruitspot	www.fruitspot.co.za	+27 11 262 8600	+27 11 262 8627	mikeg@fruitspot.co.za	Mike Goodman	Distributors of fresh fruit and vegetables
Unilever	www.unilever.co.za	+2731 570 3000		Danny.chetty@unilver.com	Danny Chetty	Manufacture soups and stocks
Woolworths	www.woolworths.co.za	+27 21 407 9111	+27 21 407 2547	wwmps@woolworths.co.za	Peter de Wet; Graham Williams	Major retailer

Appendix I: South Africa: imports of agri-food products, 2005 - 2009

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
70110	Seed potatoes, fresh/chilled	1.0	0.0	1.6	0.2	4.3	0.1	2.3	0.2	5.4	0.1	423%	85%
70190	Potatoes other than seed potatoes, fresh/chilled	6.2	30.3	45.3	119.0	2.9	12.3	93.5	292.3	15.9	53.3	159%	76%
70310	Onions and shallots, fresh/chilled	176.0	514.6	375.3	585.6	370.6	397.4	399.7	719.7	250.5	598.3	42%	16%
70320	Garlic, fresh/chilled	519.5	805.4	1 049.6	1 133.8	1 092.7	1 273.5	688.0	1 630.7	681.2	1 121.7	31%	39%
70390	Leeks and other alliaceous vegetables, fresh/chilled	0.9	17.3	3.2	6.9	10.5	2.0	-	-	2.6	10.6	196%	-39%
70410	Cauliflowers and headed broccoli, fresh/chilled	48.7	47.9	68.0	83.7	64.3	104.9	94.2	155.7	37.0	142.9	-24%	199%
70490	Cabbages, kohlrabi, kale and similar edible brassicas (excl. cauliflowers, headed broccoli and Brussels sprouts), fresh/chilled	1.4	32.6	3.4	12.3	0.1	0.3	0.9	2.3	0.1	0.1	-93%	-100%
70610	Carrots and turnips, fresh/chilled	3.1	23.2	0.3	1.0	0.5	1.8	3.1	11.2	32.3	125.4	929%	440%
70690	Salad beetroot, salsify, celeriac, radishes and similar edible roots (excl. carrots and turnips), fresh/chilled	3.2	20.2	2.2	30.1	326.4	300.5	722.2	685.5	109.0	92.6	3353%	359%
70700	Cucumbers and gherkins, fresh/chilled	28.9	20.0	33.2	124.0	11.5	49.6	2.9	3.5	-	-	-100%	-100%
70810	Peas (*Pisum sativum*), shelled/unshelled, fresh/chilled	150.6	348.8	793.5	945.1	1 503.4	724.1	1 737.2	810.2	650.9	797.7	332%	129%
70820	Beans (*Vigna* spp., *Phaseolus* spp.), shelled/unshelled, fresh/chilled	134.8	346.3	528.8	467.1	1 337.9	1 247.3	944.9	781.7	1 697.7	703.3	1159%	103%
70890	Leguminous vegetables (excl. of 0708.10 and 0708.20), shelled/unshelled, fresh/chilled	84.0	54.9	88.2	89.2	57.5	101.2	43.4	84.4	32.8	70.4	-61%	28%
70920	Asparagus, fresh/chilled	175.5	88.9	422.0	127.3	270.6	152.5	285.0	200.2	283.9	218.5	62%	146%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
70930	Aubergines (eggplants), fresh/chilled	0.7	0.3	-	-	1.3	0.1	0.0	0.0	-	-	-100%	-100%
70940	Celery (excl. celeriac), fresh/chilled	-	-	1.6	1.0	0.6	0.5	19.8	12.4	0.3	0.1		
70951	Mushrooms of the genus Agaricus, fresh/chilled	68.4	44.4	106.1	47.8	254.7	56.8	162.3	44.4	32.4	13.4	-53%	-70%
70959	Mushrooms and truffles (excl. of 0709.51), fresh/chilled	47.0	3.8	44.1	1.7	59.5	6.7	71.9	5.1	76.7	4.1	63%	9%
70960	Fruits of the genera Capsicum/Pimenta, fresh/chilled	33.2	44.3	10.3	34.8	5.7	22.3	4.9	6.9	0.8	4.0	-98%	-91%
70970	Spinach, New Zealand spinach and orache spinach (garden spinach), fresh/chilled	10.2	26.8	90.0	114.6	84.7	194.4	56.1	126.2	38.2	40.7	275%	52%
70990	Vegetables, n.e.s. in 07.01-07.09, fresh/chilled	273.0	927.4	1 249.8	1 386.2	2 157.7	1 399.0	1 013.0	876.2	1 006.1	736.6	269%	-21%
71010	Potatoes, uncooked/cooked by steaming/boiling in water, frozen	282.0	784.1	101.0	197.4	130.2	198.3	102.0	196.3	268.1	452.6	-5%	-42%
71021	Peas (*Pisum sativum*), shelled/unshelled, uncooked/cooked by steaming/boiling in water, frozen	2 291.6	3 622.3	2 161.7	3 461.1	2 287.7	2 696.0	2 721.4	2 544.9	4 495.1	4 933.1	96%	36%
71022	Beans (*Vigna* spp., *Phaseolus* spp.), shelled/unshelled, uncooked/cooked by steaming/boiling in water, frozen	233.7	369.7	783.3	1 263.3	593.2	900.1	873.5	1 416.9	168.8	245.8	-28%	-34%
71029	Leguminous vegetables (excl. of 0710.21 and 0710.22), shelled/unshelled, uncooked/cooked by steaming/boiling in water, frozen	33.4	51.1	0.0	0.0	0.9	1.0	0.1	0.2	0.1	0.5	-100%	-99%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
71030	Spinach, New Zealand spinach and orache spinach (garden spinach), uncooked/cooked by steaming/boiling in water, frozen	33.4	48.0	2.7	2.2	0.1	0.7	6.0	16.6	17.6	30.9	-47%	-36%
71040	Sweetcorn, uncooked/cooked by steaming/boiling in water, frozen	520.1	667.5	716.2	1 105.6	559.2	599.4	2 249.6	2 342.1	448.6	557.6	-14%	-16%
71080	Vegetables, n.e.s., uncooked/cooked by steaming/boiling in water, frozen	938.9	1 607.1	970.6	1 523.7	981.3	1 103.8	1 186.8	1 568.0	1 204.8	1 313.2	28%	-18%
71090	Mixtures of vegetables, uncooked/cooked by steaming/boiling in water, frozen	1 347.8	1 712.4	3 279.4	4 695.0	3 767.5	6 128.5	3 849.2	5 601.5	2 769.5	4 451.4	105%	160%
71120	Olives, provisionally preserved	633.8	515.6	780.2	598.1	543.5	395.9	477.6	284.4	229.4	126.5	-64%	-75%
71130	Capers, provisionally preserved	93.1	53.8	53.6	29.9	-	-	-	-	-	-	-100%	-100%
71140	Cucumbers and gherkins, provisionally preserved	241.8	462.8	372.1	583.8	258.5	438.3	72.4	139.4	235.2	254.8	-3%	-45%
71151	Mushrooms of the genus Agaricus, provisionally preserved	88.5	118.6	73.3	87.2	424.5	332.5	363.3	346.9	60.1	37.2	-32%	-69%
71159	Mushrooms other than of the genus Agaricus, provisionally preserved	2.8	1.0	1.9	6.9	317.1	24.3	56.2	43.6	1.4	0.6	-49%	-43%
71190	Vegetables and mixtures of vegetables provisionally preserved , but unsuitable in that state for immediate consumption	98.6	90.9	116.1	126.2	281.2	206.3	332.4	208.0	108.6	92.7	10%	2%
71220	Onions, dried, whole/cut/sliced/broken/in powder but not further prepared	1 553.1	1 024.1	1 847.3	1 485.4	4 779.6	2 034.9	2 464.1	1 355.3	3 121.6	1 699.7	101%	66%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
71231	Mushrooms of the genus Agaricus, dried, whole/cut/sliced/broken/in powder but not further prepared	392.6	47.5	204.5	28.0	345.5	28.1	286.4	23.3	249.7	20.0	-36%	-58%
71232	Wood ears (*Auricularia* spp.), dried, whole/cut/sliced/broken/in powder but not further prepared	0.0	0.2	-	-	2.8	0.8	0.9	0.7	1.3	1.8	2766%	879%
71233	Jelly fungi (*Tremella* spp.), dried, whole/cut/sliced/broken/in powder but not further prepared	1.4	2.2	0.2	0.4	0.5	0.3	0.8	0.5	0.7	0.6	-48%	-74%
71239	Mushrooms (excl. of 0712.31-0712.33) and truffles, dried, whole/cut/sliced/broken/in powder but not further prepared	32.8	19.7	80.4	32.9	25.5	8.6	83.2	53.0	211.2	84.3	543%	329%
71290	Dried vegetables, n.e.s.; mixtures of dried vegetables, whole/cut/sliced/broken/in powder but not further prepared	4 938.2	2 942.5	6 143.1	3 532.5	6 764.6	3 745.8	5 119.3	3 487.1	5 111.8	3 489.9	4%	19%
71310	Peas (*Pisum sativum*), dried, shelled, whether/not skinned/split	3 748.9	14 733.2	4 721.1	20 426.3	7 840.3	23 985.2	13 855.2	26 871.7	8 889.6	21 446.7	137%	46%
71320	Chickpeas (garbanzos), dried, shelled, whether/not skinned/split	653.1	1 190.4	780.7	1 293.5	1 684.8	1 919.3	1 286.8	1 442.3	1 512.0	1 662.4	132%	40%
71331	Beans of the species *Vigna mungo* (L.)/*Hepper/Vigna radiata* (L.) *Wilczek*, dried, shelled, whether/not skinned/split	269.7	506.4	320.5	440.4	581.4	900.3	475.0	642.6	465.9	684.3	73%	35%
71332	Small red (Adzuki) beans (*Phaseolus/Vigna angularis*), dried, shelled, whether/not skinned/split	109.1	268.5	128.6	269.6	918.2	1 628.2	962.0	1 584.1	55.3	68.8	-49%	-74%
71333	Kidney beans, incl. white pea beans (*Phaseolus vulgaris*), dried, shelled, whether/not skinned/split	16 549.9	45 158.6	27 979.9	58 038.7	50 424.2	77 307.5	39 807.3	64 378.6	50 327.8	92 209.2	204%	104%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
71339	Beans (*Vigna* spp., *Phaseolus* spp. (excl. of 0713.31-0713.33)), dried, shelled, whether/not skinned/split	2 895.4	7 064.7	4 825.8	10 515.6	4 426.7	6 806.3	2 419.8	3 434.9	838.1	924.2	-71%	-87%
71340	Lentils, dried, shelled, whether/not skinned/split	2 188.6	4 686.4	2 544.2	6 028.2	2 822.3	5 216.2	4 932.8	5 159.9	4 686.4	4 650.6	114%	-1%
71350	Broad beans (*Vicia faba* var. major) and horse beans (*Vicia faba* var. equina/var. minor), dried, shelled, whether/not skinned/split	14.2	40.2	27.5	35.2	7.2	11.1	10.5	5.4	1.2	1.1	-92%	-97%
71390	Dried leguminous vegetables, n.e.s., shelled, whether/not skinned/split	741.5	925.8	210.4	345.9	350.7	579.7	221.2	245.8	154.0	133.8	-79%	-86%
71410	Manioc (cassava)	1.2	2.9	1.9	6.2	16.3	36.0	19.3	26.5	14.9	25.7	1142%	777%
71420	Sweet potatoes	7.5	21.8	1.3	3.4	2.7	13.1	87.0	309.9	16.4	55.4	117%	154%
71490	Arrowroot, salep, Jerusalem artichokes and similar roots and tubers with high starch/inulin content, n.e.s., fresh/chilled/frozen/dried	46.3	56.5	32.3	70.8	24.8	48.6	29.4	84.2	102.9	251.4	122%	345%
	Subtotal Vegetables	***42 749.7***	***92 193.8***	***64 178.5***	***121 544.8***	***98 780.5***	***143 342.3***	***90 696.8***	***130 263.3***	***90 721.7***	***144 640.9***	112%	57%
80111	Coconuts, desiccated	4 553.0	5 090.8	3 559.8	4 658.0	5 470.1	5 279.2	8 465.3	5 562.1	5 667.7	5 525.0	24%	9%
80119	Coconuts, other than desiccated	260.4	782.7	212.0	716.6	237.8	743.5	321.7	727.5	307.7	782.2	18%	0%
80121	Brazil nuts, in shell	3.9	2.0	14.5	17.6	115.9	38.5	6.4	7.0	15.9	7.5	308%	275%
80122	Brazil nuts, shelled	1 302.1	230.0	1 289.3	272.0	829.1	199.3	1 711.5	352.0	1 022.4	240.0	-21%	4%
80131	Cashew nuts, in shell	378.0	68.6	1 269.2	274.5	2 904.9	663.8	2 570.2	404.4	3 884.3	796.0	928%	1060%
80132	Cashew nuts, shelled	8 789.1	1 713.4	10 310.4	2 245.5	8 749.8	1 938.6	8 759.4	1 649.0	6 193.1	1 444.4	-30%	-16%
80211	Almonds, in shell	9.4	2.2	572.7	87.2	84.7	19.3	161.0	40.3	98.9	20.9	953%	831%
80212	Almonds, shelled	7 073.5	1 073.7	9 639.3	1 463.6	9 074.3	1 535.4	5 572.3	1 153.3	5 387.8	1 370.0	-24%	28%
80221	Hazelnuts/filberts (*Corylus* spp.), in shell	252.6	27.1	122.0	24.0	186.0	39.7	141.2	24.2	15.0	5.0	-94%	-82%
80222	Hazelnuts/filberts (*Corylus* spp.), shelled	4 202.0	415.0	3 326.2	540.9	1 906.2	324.5	2 587.4	365.6	1 287.9	243.9	-69%	-41%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
80231	Walnuts, in shell	147.0	35.0	195.6	39.3	375.5	60.5	205.3	36.1	168.3	35.7	14%	2%
80232	Walnuts, shelled	235.9	51.3	523.4	101.9	594.4	100.5	589.1	93.8	640.8	138.5	172%	170%
80240	Chestnuts (*Castanea* spp.)	3.6	1.6	5.8	3.3	3.2	0.9	7.8	1.6	6.1	1.8	69%	11%
80250	Pistachios	823.9	155.0	864.0	135.3	499.6	92.2	412.7	97.6	730.1	106.3	-11%	-31%
80260	Macadamia nuts	-	-	-	-	1 509.9	734.4	2 589.7	804.4	2 881.2	636.0		
80290	Nuts, n.e.s. in 08.01 and 08.02, fresh/dried, whether/not shelled/peeled	3 069.1	2 083.3	3 005.8	2 237.7	2 482.9	1 408.2	3 598.4	822.0	2 275.6	649.4	-26%	-69%
80300	Bananas, incl. plantains, fresh/dried	938.9	5 365.9	2 041.1	12 865.5	3 776.6	22 076.1	4 318.6	24 316.0	3 742.5	22 615.4	299%	321%
80410	Dates, fresh/dried	1 749.3	1 119.2	3 338.0	1 316.5	3 051.3	1 643.1	1 515.8	1 203.3	1 520.7	1 456.2	-13%	30%
80420	Figs, fresh/dried	387.8	163.0	400.0	157.4	572.6	194.9	592.4	148.0	367.7	98.8	-5%	-39%
80430	Pineapples, fresh/dried	212.5	381.1	263.1	312.2	184.6	104.0	259.0	244.3	256.6	230.8	21%	-39%
80440	Avocados, fresh/dried	2 059.0	1 537.9	2 416.7	1 496.5	3 558.6	1 886.2	2 967.0	1 122.7	3 423.9	1 380.7	66%	-10%
80450	Guavas, mangoes and mangosteens, fresh/dried	361.6	371.5	560.2	807.1	497.1	823.2	516.4	513.6	427.9	500.3	18%	35%
80510	Oranges, fresh/dried	228.6	353.0	745.5	14 329.5	673.1	5 740.6	1 853.6	6 783.4	579.8	1 699.0	154%	381%
80520	Mandarins, incl. tangerines and satsumas; clementines, wilkings and similar citrus hybrids, fresh/dried	553.0	623.7	554.5	612.0	705.8	789.5	753.7	801.9	760.1	660.5	37%	6%
80540	Grapefruit, fresh/dried	308.5	2 208.5	565.4	3 876.4	620.8	1 315.1	381.6	445.3	399.2	999.1	29%	-55%
80550	Lemons (*Citrus limon/limonum*) and limes (*Citrus aurantifolia/latifolia*), fresh/dried	0.3	0.1	8.8	7.2	0.2	0.1	86.6	95.7	95.1	95.9		
80590	Citrus fruit (excl. of 0805.10-0805.50), fresh/dried	14.6	6.6	28.3	21.6	0.2	0.3	2.9	0.7	41.4	8.7	183%	32%
80610	Grapes, fresh	1 586.9	923.4	2 961.9	1 415.6	3 279.3	1 608.0	3 033.5	1 501.2	3 905.0	1 976.9	146%	114%
80620	Grapes, dried	3 198.4	3 252.2	514.9	416.4	164.2	93.9	126.8	65.2	4 240.9	2 617.9	33%	-20%
80711	Watermelons, fresh	-	-	-	-	48.0	42.2	0.0	0.0	-	-		

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
80719	Melons (excl. watermelons), fresh	0.2	0.3	3.8	3.1	41.4	42.3	0.0	0.0	0.7	3.4	277%	1202%
80720	Papaws (papayas), fresh/dried	-	-	8.6	5.0	165.4	60.9	0.1	0.0	0.1	0.0		
80810	Apples, fresh	-	-	22.6	49.5	122.6	69.0	85.9	94.3	189.5	234.8		
80820	Pears and quinces, fresh	-	-	23.7	14.6	-	-	197.6	188.3	121.4	185.1		
80910	Apricots, fresh	0.4	0.0	104.9	40.3	221.1	92.2	226.5	106.6	5.2	1.9	1253%	93950%
80920	Cherries, fresh	167.4	64.4	293.2	76.2	215.4	46.2	65.3	8.6	212.0	41.6	27%	-35%
80930	Peaches, incl. nectarines, fresh	875.4	645.2	2 102.6	1 024.9	1 385.2	769.4	1 301.8	669.8	1 046.3	657.6	20%	2%
80940	Plums and sloes, fresh	395.2	300.7	644.4	339.8	868.2	544.1	596.8	290.3	757.3	502.9	92%	67%
81010	Strawberries, fresh	216.8	136.4	367.3	289.1	721.9	429.0	579.9	391.8	650.1	419.5	200%	208%
81020	Raspberries, blackberries, mulberries and loganberries, fresh	0.2	0.0	35.7	8.7	59.1	28.9	0.1	0.0	27.1	5.8	14795%	36388%
81030	Black/white/red currants and gooseberries, fresh	12.3	20.3	11.4	24.7	-	-	-	-	-	-	-100%	-100%
81040	Cranberries, bilberries and other fruits of the genus Vaccinium, fresh	63.8	9.6	7.0	2.5	65.8	14.7	42.9	12.1	13.0	1.9	-80%	-80%
81050	Kiwifruit, fresh	1 657.4	1 170.2	2 997.7	2 114.1	3 162.7	1 959.1	4 005.1	2 110.9	2 704.5	1 717.4	63%	47%
81060	Durians, fresh	-	-	0.0	0.0	-	-	-	-	-	-		
81090	Fresh fruit, n.e.s. in Ch. 8	93.0	111.1	203.8	134.6	440.0	259.7	526.9	283.5	260.8	179.0	180%	61%
81110	Strawberries, uncooked/cooked by steaming/boiling in water, frozen, whether/not containing added sugar/other sweetening matter	445.5	776.3	296.0	393.7	1 230.0	1 006.9	634.1	545.8	600.0	750.3	35%	-3%
81120	Raspberries, blackberries, mulberries, loganberries, black/white/red currants and gooseberries, uncooked/cooked by steaming/boiling in water, frozen, whether/not containing added sugar/other	570.3	459.9	628.3	468.7	875.1	700.4	727.2	435.4	503.1	375.5	-12%	-18%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
	sweetening matter												
81190	Fruit and nuts, n.e.s., uncooked/cooked by steaming/boiling in water, frozen, whether/not containing added sugar/other sweetening matter	1 429.7	804.0	1 408.1	755.6	1 796.4	774.1	2 014.3	999.3	1 796.9	943.7	26%	17%
81210	Cherries, provisionally preserved but unsuitable in that state for immediate consumption	3 029.9	1 639.0	1 631.3	888.1	2 160.3	1 103.4	3 724.5	1 401.1	2 148.6	856.0	-29%	-48%
81290	Fruit (excl. cherries) and nuts, provisionally preserved but unsuitable in that state for immediate consumption	234.5	415.6	14.1	6.1	32.1	26.2	17.0	7.3	5.6	1.8	-98%	-100%
81310	Apricots, dried	668.4	239.2	451.5	224.7	642.5	248.7	683.6	214.0	780.7	266.2	17%	11%
81320	Prunes, dried	706.4	259.9	133.4	179.4	1 082.9	597.7	528.0	214.5	431.4	242.1	-39%	-7%
81330	Apples, dried	189.2	55.3	217.1	60.5	230.1	86.5	421.7	96.7	180.6	70.4	-5%	27%
81340	Dried fruit (excl. of 08.01-08.06 and 0813.10-0813.30)	720.6	592.7	692.8	486.6	1 310.2	498.8	1 624.4	615.0	1 193.9	375.7	66%	-37%
81350	Mixtures of nuts/dried fruits of Ch.8	146.5	21.3	110.0	27.5	52.6	20.4	21.4	5.2	47.6	21.0	-68%	-2%
81400	Peel of citrus fruit/melons, incl. watermelons, fresh/frozen/dried/provisionally preserved in brine/sulphur water/other preservative solutions	216.0	163.9	302.1	217.0	149.3	97.3	7.1	1.1	12.4	9.4	-94%	-94%
	Subtotal: Fruits	***54 542.0***	***35 923.4***	***62 019.7***	***58 286.4***	***69 186.8***	***58 971.4***	***72 139.6***	***58 073.7***	***64 032.4***	***54 205.6***	17%	51%
90411	Pepper (genus Piper), neither crushed/ground	2 644.5	1 774.9	3 766.8	1 895.1	6 763.1	1 964.0	7 321.9	2 029.7	5 724.1	1 908.9	116%	8%
90412	Pepper (genus Piper), crushed/ground	677.0	613.9	635.7	388.5	1 323.6	413.2	1 965.7	491.4	1 621.6	692.2	140%	13%
90420	Fruits of the genera Capsicum/Pimenta, dried/crushed/ground	4 661.9	4 560.3	5 590.3	4 630.5	5 665.0	4 874.0	8 139.0	5 691.0	4 889.7	4 059.8	5%	-11%
90500	Vanilla	151.0	7.5	147.8	8.0	179.8	9.9	124.7	10.4	248.9	12.9	65%	73%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
90611	Cinnamon(*Cinnamomum zeylanicum* Blume) and cinnamon-tree flowers, neither crushed/ground	509.7	579.7	647.5	532.0	541.8	415.6	505.1	386.1	343.3	255.3	-33%	-56%
90619	Cinnamon (excl. of 0906.11) and cinnamon-tree flowers, neither crushed/ground	-	-	-	-	192.9	143.8	300.4	236.2	200.2	182.6		
90620	Cinnamon and cinnamon-tree flowers, crushed/ground	93.6	94.0	148.8	116.5	186.8	167.7	102.9	59.1	304.8	210.8	226%	124%
90700	Cloves (whole fruit, cloves and stems)	754.7	313.8	962.6	304.3	974.6	352.9	927.3	289.9	880.9	303.6	17%	-3%
90810	Nutmeg	1 184.3	211.8	1 646.1	510.2	1 713.1	246.9	1 581.4	215.1	2 162.6	281.1	83%	33%
90820	Mace	45.4	7.2	111.2	15.9	88.6	10.0	119.9	12.1	154.6	14.4	240%	101%
90830	Cardamoms	234.8	62.8	301.9	65.7	448.4	69.3	383.2	37.7	728.2	75.7	210%	20%
90910	Seeds of anise/badian	206.1	125.2	225.9	135.9	261.1	150.8	282.3	107.9	307.7	91.9	49%	-27%
90920	Seeds of coriander	1 446.0	3 276.2	1 350.0	2 864.4	2 838.6	3 707.8	5 089.9	4 009.4	2 766.4	2 570.5	91%	-22%
90930	Seeds of cumin	1 259.0	724.1	1 318.4	774.4	2 112.4	786.1	2 402.9	884.1	1 680.4	708.1	33%	-2%
90940	Seeds of caraway	59.5	52.1	139.6	131.3	114.7	82.1	263.0	98.2	151.5	77.5	154%	49%
90950	Seeds of fennel; juniper berries	423.0	302.3	708.5	516.7	599.5	381.1	660.9	478.8	564.7	313.3	34%	4%
91010	Ginger	1 105.4	744.4	1 526.0	1 356.6	1 275.7	1 547.3	893.0	858.3	954.4	985.7	-14%	32%
91020	Saffron	316.1	4.1	225.8	1.9	321.8	2.3	505.8	4.1	393.7	2.4	25%	-42%
91030	Turmeric (curcuma)	1 857.4	2 269.7	1 786.2	2 238.1	1 821.8	2 225.5	2 555.2	2 340.4	2 999.1	2 208.0	61%	-3%
91040	Thyme; bay leaves	334.9	155.9	380.0	170.3	-	-	-	-	-	-	-100%	-100%
91050	Curry	80.8	78.4	131.5	121.3	-	-	-	-	-	-	-100%	-100%
91091	Mixtures of 2/more products of different headings of 09.04-09.10	296.1	75.3	543.3	174.3	503.3	136.7	862.6	265.0	500.9	149.3	69%	98%
91099	Spices, n.e.s. in Ch. 9	1 919.9	2 038.8	1 879.2	1 914.0	3 363.3	2 585.5	3 484.6	2 401.7	4 159.5	2 995.2	117%	47%
120740	Sesamum seeds, whether/not broken	1 757.2	1 590.8	1 459.2	1 401.5	2 157.5	1 766.4	2 264.7	1 081.6	2 549.7	1 388.2	45%	-13%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
120750	Mustard seeds, whether/not broken	126.2	237.0	167.8	310.2	324.8	349.8	561.2	416.7	345.1	333.0	174%	40%
	Subtotal: Spices	***22 144.5***	***19 900.3***	***25 800.2***	***20 577.7***	***33 772.0***	***22 388.9***	***41 297.5***	***22 405.0***	***34 632.0***	***19 820.4***	56%	0%
200110	Cucumbers and gherkins, prepared/preserved by vinegar/acetic acid	556.6	671.5	820.2	952.8	1 063.6	1 140.7	720.6	708.8	736.3	716.9	32%	7%
200190	Vegetables, fruit, nuts and other edible parts of plants (excl. cucumbers and gherkins), prepared/preserved by vinegar/acetic acid	730.4	564.4	926.2	570.1	787.4	562.3	1 105.7	799.6	1 120.3	974.7	53%	73%
200210	Tomatoes, prepared/preserved otherwise than by vinegar/acetic acid, whole/in pieces	3 201.4	6 049.9	4 322.2	7 736.6	7 123.8	10 734.4	6 240.8	7 750.8	6 920.8	7 912.9	116%	31%
200290	Tomatoes, prepared/preserved otherwise than by vinegar/acetic acid, other than whole/in pieces	4 055.6	6 917.8	5 431.6	9 052.5	5 944.2	8 955.9	10 190.8	8 485.8	11 986.5	10 337.8	196%	49%
200310	Mushrooms of the genus Agaricus, prepared/preserved otherwise than by vinegar/acetic acid	396.8	545.3	330.7	333.8	459.4	359.3	688.5	790.7	705.7	805.1	78%	48%
200320	Truffles, prepared/preserved otherwise than by vinegar/acetic acid	4.3	0.3	8.6	0.3	57.3	4.2	44.4	2.6	29.1	1.5	572%	484%
200390	Mushrooms other than of the genus Agaricus, prepared/preserved otherwise than by vinegar/acetic acid	362.8	412.4	725.9	586.9	778.1	488.3	344.4	243.2	433.1	329.3	19%	-20%
200410	Potatoes, prepared/preserved otherwise than by vinegar/acetic acid, frozen, other than products of 20.06	6 408.6	14 062.1	15 787.5	30 730.8	24 150.7	36 088.8	18 161.7	23 698.7	14 179.4	19 049.9	121%	35%
200490	Vegetables and mixtures of vegetables, preserved/preserved otherwise than by vinegar/acetic acid, frozen, other than potatoes and products of 20.06	93.6	140.9	277.5	398.3	300.2	271.3	199.7	248.8	163.6	141.0	75%	0%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
200510	Homogenized vegetables, prepared/preserved otherwise, than by vinegar/acetic acid, not frozen, other than products of 20.06	172.3	63.0	82.3	23.4	91.4	36.4	16.0	15.7	8.0	14.9	-95%	-76%
200520	Potatoes, prepared/preserved othw. than by vinegar/acetic acid, not frozen, other than products of 20.06	108.2	47.4	2 061.0	758.0	2 020.9	775.1	2 493.0	953.2	2 068.5	731.4	1812%	1445%
200540	Peas (Pisum sativum), preserved/preserved othw. than by vinegar/acetic acid, not frozen, other than products of 20.06	932.2	1 372.0	1 227.7	1 710.5	1 429.6	1 679.8	1 260.1	1 337.3	1 367.3	1 404.4	47%	2%
200551	Beans (Vigna spp., Phaseolus spp.), shelled, prepared/preserved othw. than by vinegar/acetic acid, not frozen, other than products of 20.06	5 318.3	9 654.5	5 062.0	9 176.5	4 079.8	6 883.6	1 521.9	2 242.7	1 581.6	2 139.3	-70%	-78%
200559	Beans (excl. *Vigna* spp., *Phaseolus* spp.), shelled, prepared/preserved otherwise than by vinegar/acetic acid, not frozen, other than products of 20.06	3 049.2	5 662.8	3 651.3	5 957.8	2 870.6	3 974.6	2 190.5	2 721.2	2 520.4	3 041.5	-17%	-46%
200560	Asparagus, preserved/preserved otherwise than by vinegar/acetic acid, not frozen, other than products of 20.06	412.2	479.1	319.4	261.8	583.4	383.2	422.5	291.2	1 198.0	832.6	191%	74%
200570	Olives, preserved/preserved otherwise. than by vinegar/acetic acid, not frozen, other than products of 20.06	1 018.1	596.3	1 517.7	894.6	2 133.4	1 119.9	1 458.8	679.8	1 492.0	690.5	47%	16%
200580	Sweetcorn (*Zea mays* var. saccharata), prepared/preserved otherwise than by vinegar/acetic acid, not frozen, other than products of 20.06	898.2	1 303.1	523.1	691.2	1 234.8	1 661.4	1 824.9	2 052.9	988.1	1 273.1	10%	-2%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
200591	Bamboo shoots, prepared/preserved otherwise than by vinegar/acetic acid, not frozen, other than products of heading 20.06	-	-	-	-	40.8	73.0	28.4	32.2	49.0vi	70.2		
200599	Vegetables and mixtures of vegetables (excl. of 2005.10-2005.91), prepared/preserved otherwise than by vinegar/acetic acid, not frozen, other than products of heading 20.06	1 667.3	1 129.2	2 357.9	1 586.7	2 324.0	1 764.0	2 146.5	1 646.9	1 718.9	1 197.2	3%	6%
200600	Vegetables, fruit, nuts, fruit-peel and other parts of plants, preserved by sugar (drained/glacé/crystallized)	84.2	72.1	327.8	133.5	491.9	243.4	641.3	324.4	585.1	302.0	595%	319%
200710	Homogenized preparations of fruits/nuts, obtained by cooking, whether/not containing added sugar/other sweetening matter	18.1	13.6	28.6	29.1	70.4	20.3	67.2	33.7	26.2	18.5	45%	36%
200791	Citrus fruit preparations (excl. homogenized), obtained by cooking, whether/not containing added sugar/other sweetening matter	104.2	74.2	114.3	76.7	161.9	89.8	204.0	94.2	253.9	125.5	144%	69%
200799	Preparations of fruit (excl. citrus fruit; excl. homogenized), obtained by cooking, whether/not containing added sugar/other sweetening matter	1 621.2	960.4	1 575.8	934.3	2 222.9	1 268.6	1 817.0	709.4	2 490.0	1 312.6	54%	37%
200811	Groundnuts, prepared/preserved, whether/not containing added/sugar/other sweetening matter/spirit, n.e.s.	1 351.2	1 097.6	5 066.2	5 955.3	9 916.2	10 048.4	12 126.8	8 519.5	9 574.4	8 090.6	609%	637%
200819	Nuts (excl. groundnuts), incl. mixtures, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	5 801.1	923.3	5 101.9	1 155.1	7 122.2	1 606.6	4 605.5	1 071.8	6 015.9	1 344.6	4%	46%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
200820	Pineapples, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	561.0	1 036.8	257.4	436.4	481.0	786.4	1 974.0	2 357.5	1 265.1	2 308.0	126%	123%
200830	Citrus fruit, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	100.4	80.2	76.3	71.3	65.7	54.3	58.7	38.9	316.2	213.1	215%	166%
200840	Pears, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	23.5	18.2	51.0	31.7	79.5	71.8	79.1	87.9	35.3	21.8	50%	20%
200850	Apricots, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	87.8	47.4	15.4	4.8	26.5	20.1	65.5	37.9	70.9	43.9	-19%	-7%
200860	Cherries, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	547.8	252.6	595.8	396.0	482.0	200.2	443.6	178.0	448.1	173.2	-18%	-31%
200870	Peaches, incl. nectarines, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	186.4	216.3	170.6	126.2	299.8	294.0	382.1	415.9	129.5	105.7	-31%	-51%
200880	Strawberries, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	319.9	217.7	326.2	308.3	407.8	266.4	395.1	229.4	398.2	314.2	24%	44%
200891	Palm hearts, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	32.2	17.4	49.5	19.3	45.0	19.1	47.3	20.2	53.5	17.8	66%	2%
200892	Mixtures of edible parts of plants (excl. of 2008.19), prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	208.3	159.7	296.5	118.0	563.4	415.9	581.2	414.6	490.8	106.8	136%	-33%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
200899	Edible parts of plants, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	3 533.3	2 303.9	4 620.2	3 089.1	5 832.6	3 630.6	5 679.3	3 447.9	6 886.8	5 719.8	95%	148%
200911	Orange juice, frozen, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	167.6	238.3	47.3	22.7	292.5	153.5	997.4	641.9	63.3	23.9	-62%	-90%
200912	Orange juice, not frozen, of a Brix value not >20, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	0.6	0.5	1.4	3.1	4.4	6.8	1.1	0.2	2.1	5.0	264%	829%
200919	Orange juice, not frozen (excl. of 2009.19), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	346.3	434.1	106.7	266.9	614.7	582.2	1 165.1	972.7	422.7	388.9	22%	-10%
200921	Grapefruit juice, of a Brix value not >20, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	-	-	2.2	4.1	1.4	2.7	-	-	0.1	0.3		
200929	Grapefruit juice (excl. of 2009.21), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	85.6	61.4	83.5	86.9	20.5	31.6	172.1	128.6	70.9	29.8	-17%	-51%
200931	Juice of any single citrus fruit other than orange/grapefruit, of a Brix value not >20, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	0.9	0.1	2.3	4.3	2.0	3.6	1.5	4.0	1.8	3.9	102%	7632%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value: US$ '000	Volume: tons	Value	Volume
200939	Juice of any single citrus fruit other than orange/grapefruit (excl. of 2009.31), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	87.7	153.3	112.1	82.5	113.5	106.7	186.9	70.5	567.7	265.8	547%	73%
200941	Pineapple juice, of a Brix value not >20, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	-	-	-	-	-	-	0.4	1.5	4.6	10.3		
200949	Pineapple juice (excl. of 2009.41), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	63.9	48.8	1 224.0	1 205.5	1 100.9	1 032.4	727.2	698.9	191.5	190.0	200%	289%
200950	Tomato juice, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	5.2	5.8	20.5	13.3	18.7	12.7	18.5	10.2	12.5	7.1	139%	23%
200961	Grape juice, incl. grape must, of a Brix value not >30, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	65.8	14.3	1.9	3.3	9.1	8.6	82.6	72.8	5.9	12.9	-91%	-9%
200969	Grape juice, incl. grape must (excl. of 2009.61), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	8 435.1	9 617.7	14 522.7	17 680.4	22 963.0	26 530.9	25 551.4	20 953.5	16 928.6	14 545.7	101%	51%
200971	Apple juice, of a Brix value not >20, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	177.7	235.0	1 194.6	1 174.0	587.6	568.5	234.3	139.3	5.4	11.7	-97%	-95%

HS code	Description	2005		2006		2007		2008		2009		Growth 2005 - 2009	
		Value: US$ '000	**Volume: tons**	**Value: US$ '000**	**Volume: tons**	**Value: US$ '000**	**Volume: tons**	**Value: US$ '000**	**Volume: tons**	**Value: US$ '000**	**Volume: tons**	**Value**	**Volume**
200979	Apple juice (excl. of 2009.71), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	8 780.9	12 990.6	10 212.9	10 227.4	30 857.7	21 862.9	19 395.8	12 966.2	31 316.2	32 417.0	257%	150%
200980	Juice of any single fruit/vegetable (excl. of 2009.11-2009.79), unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	4 001.8	2 287.6	5 307.0	2 651.2	7 557.3	4 000.2	6 905.8	2 332.0	7 872.5	3 624.9	97%	58%
200990	Mixtures of juices, unfermented and not containing added spirit, whether/not containing added sugar/other sweetening matter	227.1	295.2	436.9	345.0	486.7	645.5	523.5	494.1	583.9	612.2	157%	107%
	Subtotal: Processed fruits and vegetables	***66 413.0***	***83 546.0***	***97 382.2***	***118 078.6***	***150 371.9***	***151 540.9***	***136 190.1***	***112 169.7***	***136 356.4***	***124 031.6***	**105%**	**48%**
Grand total		**185 849.2**	**231 563.5**	**249 380.7**	**318 487.5**	**352 111.2**	**376 243.4**	**340 324.0**	**322 911.8**	**325 742.5**	**342 698.5**	**75%**	

Appendix II: South Africa: import tariffs on agri-food products

HS code	Description	General	EU	EFTA	SADC
07.01	Potatoes, fresh or chilled:				
0701.1	Seed	0.44 c/kg	Free	0. 44 c/kg	Free
0701.9	Other	0.44 c/kg	Free	0. 44 c/kg	Free
07.02	Tomatoes, fresh or chilled				
0702	Tomatoes, fresh or chilled	15%	Free	15%	Free
07.03	Onions, shallots, garlic, leeks and other alliaceous vegetables,fresh or chilled:				
0703.1	Onions and shallots	15%	Free	15%	Free
0703.2	Garlic	325 c/kg with a maximum of 37%	Free	325 c/kg with a maximum of 37%	Free
0703.9	Leeks and other alliaceous vegetables	15%	Free	15%	Free
07.04	Cabbages, cauliflowers, kohlrabi, kale and similar edible brassicas, fresh or chilled:				
0704.1	Cauliflowers and headed broccoli	Free	Free	Free	Free
0704.2	Brussels sprouts	Free	Free	Free	Free
0704.9	Other	Free	Free	Free	Free
07.05	Lettuce (*Lactuca sativa*) and chicory (*Cichorium* spp.) ,fresh or chilled:				
0705.1	Lettuce:				
0705.11	Cabbage lettuce	Free	Free	Free	Free
0705.19	Other	Free	Free	Free	Free
0705.2	Chicory				
0705.21	Witloof chicory (*Cichorium intybus* var. foliosum)	Free	Free	Free	Free
0705.29	Other	Free	Free	Free	Free
07.06	Carrots, turnips, salad beetroot, salsify, celeriac, radishes and similar edible roots, fresh or chilled:				
0706.1	Carrots and turnips	Free	Free	Free	Free
0706.9	Other	Free	Free	Free	Free
0707.00	Cucumbers and gherkins, fresh or chilled	15%	Free	15%	Free
07.08	Leguminous vegetables, shelled or unshelled, fresh or chilled:				
0708.10	Peas (*Pisum sativum*)	15%	Free	15%	Free
0708.20	Beans (*Vigna spp.*, *Phaseolus spp.*)	Free	Free	Free	Free
0708.90	Other	Free	Free	Free	Free
07.09	Other vegetables, fresh or chilled:				
0709.20	Asparagus	15%	Free	15%	Free
0709.30	Aubergines (eggplants)	Free	Free	Free	Free
0709.40	Celery other than celeriac	Free	Free	Free	Free
0709.5	Mushrooms and truffles:				
0709.51	Mushrooms of the genus Agaricus	15%	3,75%	15%	Free
0709.59	Other:				
0709.59.10	Truffles	Free	Free	Free	Free

HS code	Description	General	EU	EFTA	SADC
0709.59.90	Other	15%	3.75%	15%	Free
0709.60	Fruits of the genus Capsicum or of the genus Pimenta	15%	Free	15%	Free
0709.70	Spinach, New Zealand spinach and orache spinach (garden spinach)	Free	Free	Free	Free
0709.90					
0709.90.10	Globe artichokes	Free	Free	Free	Free
0709.90.90	Other	15%	Free	15%	Free
07.10	Vegetables (uncooked or cooked by steaming or boiling in water), frozen:				
0710.10	Potatoes, fresh or chilled:	30%	7.5%	30%	Free
0710.2	Leguminous vegetables, shelled or unshelled:				
0710.21	Peas (*Pisum sativum*)	10%	2.5%	10%	Free
0710.22	Beans (*Vigna* spp., *Phaseolus* spp.)	10%	2.5%	10%	Free
0710.29	Other	24%	6%	24%	Free
0710.30	Spinach, New Zealand spinach and orache spinach (garden spinach)	20%	5%	20%	Free
0710.40	Sweetcorn	10%	2.5%	10%	Free
0710.80	Other vegetables:				
0710.80.10	Truffles	Free	Free	Free	Free
0710.80.90	Other	10%	2.5%	10%	Free
0710.90	Mixtures of vegetables	10%	Free	10%	Free
07.11	Vegetables provisionally preserved (for example, by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions), but unsuitable in that state for immediate consumption:				
0711.20	Olives	25%	6.25%	25%	Free
0711.40	Cucumbers and gherkins	20%	5%	20%	Free
0711.5	Mushrooms and truffles:				
0711.51	Mushrooms of the genus Agaricus	20%	5%	20%	Free
0711.59	Other	20%	5%	20%	Free
0711.90	Other vegetables; mixtures of vegetables:				
0711.90.10	Shallots and leeks	20%	5%	20%	Free
0711.90.20	Capers	20%	Free	20%	Free
0711.90.30	Fruits of the genus Pimenta	Free	Free	Free	Free
0711.90.90	Other	20%	5%	20%	Free
07.12	Dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared:				
0712.20	Onions	20%	5%	20%	Free
0712.3	Mushrooms, wood ears (AURICULARIA SPP.), jelly fungi (TREMELLA SPP.) and truffles				
0712.31	Mushrooms of the genus Agaricus	20%	5%	20%	Free
0712.32	Wood ears (*Auricularia* spp.)	20%	5%	20%	Free
0712.33	Jelly fungi (*Tremella* spp.)	20%	5%	20%	Free
0712.39 4	Other	20%	5%	20%	Free
0712.90.15	Culinary herbs	4 c/kg	Free	4 c/kg	Free
0712.90.90	Other	20%	5%	20%	Free

HS code	Description	General	EU	EFTA	SADC
07.13	Dried leguminous vegetables, shelled, whether or not skinned or split:				
0713.10 - Peas (*Pisum sativum*):					
0713.10.20	Green peas, whole	15%	Free	15%	Free
0713.10.25	Green peas, skinned or split	30%	7.5%	30%	Free
0713.10.90	Other	Free	Free	Free	Free
0713.20	Chickpeas (garbanzos)	Free	Free	Free	Free
0713.3 - Beans (*Vigna* spp., *Phaseolus* spp.):					
0713.31	Beans of the species *Vigna mungo (L.)* Hepper or *Vigna radiata* (L.) Wilczek	15%	Free	15%	Free
0713.32	Small red (adzuki) beans (*Phaseolus* or *Vigna angularis)*	10%	2.5%	10%	Free
0713.33	Kidney beans, including white pea beans (*Phaseolus vulgaris*)	10%	Free	10%	Free
0713.39	Other	10%	Free	10%	Free
0713.40	Lentils	Free	Free	Free	Free
0713.50	Broad beans (*Vicia faba* var. major) and horse beans (*Vicia faba* var. equina, *Vicia faba* var. minor)	15%	Free	15%	Free
0713.90	Other:				
0713.90.10	Whole	15%	Free	15%	Free
0713.90.20	Skinned or split	24%	Free	24%	Free
07.14	Manioc, arrowroot, salep, Jerusalem artichokes, sweet potatoes and similar roots and tubers with high starch or inulin content, fresh, chilled, frozen or dried, whether or not sliced or in the form of pellets; sago pith:				
0714.10	Manioc (cassava):				
0714.10.10	Frozen	5%	Free	5%	Free
0714.10.90	Other	Free	Free	Free	Free
0714.20	Sweet potatoes:				
0714.20.10	Frozen	5%	Free	5%	Free
0714.20.90	Other	Free	Free	Free	Free
0714.90	Other:				
0714.90.10	Frozen	5%	Free	5%	Free
0714.90.90	Other	Free	Free	Free	Free
08.01	Coconuts, Brazil nuts and cashew nuts, fresh or dried, whether or not shelled or peeled:				
0801.1	Coconuts:				
0801.11	Desiccated:				
0801.11.10	Unsweetened	Free	Free	Free	Free
0801.11.90	Other	Free	Free	Free	Free
0801.19					
0801.19.10	Whole	Free	Free	Free	Free
0801.19.90	Other				
0801.2	Brazil nuts:				
0801.21	In shell	Free	Free	Free	Free
0801.22	Shelled	Free	Free	Free	Free

HS code	Description	General	EU	EFTA	SADC
0801.3	Cashew nuts:				
0801.31	In shell	Free	Free	Free	Free
0801.32	Shelled	Free	Free	Free	Free
08.02	Other nuts, fresh or dried, whether or not shelled or peeled:				
0802.1	Almonds:				
0802.11	In shell	Free	Free	Free	Free
0802.12	Shelled	Free	Free	Free	Free
0802.2	Hazelnuts or filberts (*Corylus* spp.):				
0802.21	In shell	Free	Free	Free	Free
0802.22	Shelled	Free	Free	Free	Free
0802.3	Walnuts:				
0802.31	In shell	Free	Free	Free	Free
0802.32	Shelled	Free	Free	Free	Free
0802.40	Chestnuts (*Castanea* spp.)	Free	Free	Free	Free
0802.50	Pistachios	Free	Free	Free	Free
0802.60	Macadamia nuts	Free	Free	Free	Free
0802.90	Other	Free	Free	Free	Free
0803.00	Bananas, including plantains, fresh or dried	5%	Free	5%	Free
08.04	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried:				
0804.10	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried:	Free	Free	Free	Free
0804.20	Figs	Free	Free	Free	Free
0804.40	Avocados	5%	Free	5%	Free
0804.50	Guavas, mangoes and mangosteens	35%	Free	35%	Free
08.05	Citrus fruit, fresh or dried:				
0805.10	Oranges	0804.30	Pineapples	15%	Free
0805.20	Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids	4%	Free	4%	Free
0805.40	Grapefruit, including pomelos	4%	Free	4%	Free
0805.50	Lemons (*Citrus limon, Citrus limonum*) and limes (*Citrus aurantifolia*, *Citrus latifolia*)	4%	Free	4%	Free
0805.90	Other	4%	Free	4%	Free
08.06	Grapes, fresh or dried:				
0806.10	Fresh	4%	Free	4%	Free
0806.20	Dried	10%	Free	10%	Free
08.07	Melons (including watermelons) and papaws (papayas), fresh:				
0807.1	Melons (including watermelons):				
0807.11	Watermelons	15%	Free	15%	Free
0807.19	Other	15%	Free	15%	Free
0807.20	Papaws (papayas)	15%	Free	15%	Free
08.08	Apples, pears and quinces, fresh:				

HS code	Description	General	EU	EFTA	SADC
0808.10	Apples, pears and quinces, fresh:	4%	Free	4%	Free
0808.20	Pears and quinces	4%	Free	4%	Free
8.09	Apricots, cherries, peaches (including nectarines), plums and sloes, fresh:				
0809.10	Apricots	4%	Free	4%	Free
0809.20	Cherries	4%	Free	4%	Free
0809.30	Peaches, including nectarines	4%	Free	4%	Free
0809.40	Plums and sloes	4%	Free	4%	Free
08.10	Other fruit, fresh:				
0810.10	Strawberries	15%	Free	15%	Free
0810.20	Raspberries, blackberries, mulberries and loganberries	Free	Free	Free	Free
0810.40	Cranberries, bilberries and other fruits of the genus Vaccinium	Free	Free	Free	Free
0810.50	Kiwifruit	5%	Free	5%	Free
0810.60	Durians	5%	Free	5%	Free
0810.90	Other:				
0810.90.10	Granadillas and litchis	15%	Free	15%	Free
0810.90.20	Black, white or red currants and gooseberries	Free	Free	Free	Free
0810.90.90	Other	5%	Free	5%	Free
8.11	Fruit and nuts, uncooked or cooked by steaming or boiling in water, frozen, whether or not containing added sugar or other sweetening matter:				
0811.10	Strawberries	20%	5%	20%	Free
0811.20	Raspberries, blackberries, mulberries, loganberries, black, white or red currants and gooseberries	20%	5%	20%	Free
0811.90	Other:				
0811.90.15	Granadilla pulp; litchi pulp	5%	Free	5%	Free
0811.90.90	Other	20%	5%	20%	Free
8.12	Fruit and nuts, provisionally preserved (for example, by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions), but unsuitable in that state for immediate consumption:				
0812.10	Cherries	20%	Free	20%	Free
0812.90	Other:				
0812.90.15	Granadilla pulp; litchi pulp	5%	Free	5%	Free
0812.90.20	Strawberries	20%	5%	20%	Free
0812.90.90	Other	20%	Free	20%	Free
8.13	Fruit, dried (excluding that of headings 08.01 to 08.06); mixtures of nuts or dried fruits of this Chapter:				
0813.10	Apricots	10%	2.5%	10%	Free
0813.20	Prunes	10%	Free	10%	Free
0813.30	Apples, pears and quinces, fresh	10%	Free	10%	Free
0813.40	Other fruit	10%	Free	10%	Free
0813.50	Mixtures of nuts or dried fruits of this Chapter	10%	Free	10%	Free
0814.00	Peel of citrus fruit or melons (including watermelons), fresh,frozen, dried or provisionally preserved in brine, in sulphur	Free	Free	Free	Free

HS code	**Description**	**General**	**EU**	**EFTA**	**SADC**
	water or in other preservative solutions				
09.04	Pepper of the genus Piper; dried or crushed or ground fruits of the genus Capsicum or of the genus Pimenta:				
0904.1	Pepper:				
0904.11	Neither crushed nor ground	Free	Free	Free	Free
0904.12	Crushed or ground	Free	Free	Free	Free
0904.20	Fruits of the genus Capsicum or of the genus Pimenta, dried or crushed or ground:				
0904.20.30	Fruits of the genus Capsicum	25%	6.25%	25%	Free
0904.20.50	Fruits of the genus Pimenta	Free	Free	Free	Free
0905.00	Vanilla	Free	Free	Free	Free
09.06	Cinnamon and cinnamon-tree flowers:				
0906.1	Neither crushed nor ground:				
0906.11	Cinnamon (*Cinnamomum zeylanicum* Blume)	Free	Free	Free	Free
0906.19	Other	Free	Free	Free	Free
0906.20	Crushed or ground	Free	Free	Free	Free
0907.00	Cloves (whole fruit, cloves and stems)	Free	Free	Free	Free
09.08	Nutmeg, mace and cardamoms:				
0908.10	Nutmeg	Free	Free	Free	Free
0908.20	Mace	Free	Free	Free	Free
0908.30	Cardamoms	Free	Free	Free	Free
09.09	Seeds of anise, badian, fennel, coriander, cumin, or caraway; juniper berries:				
0909.10	Seeds of anise or badian	Free	Free	Free	Free
0909.20	Seeds of coriander	Free	Free	Free	Free
0909.30	Seeds of cumin	Free	Free	Free	Free
0909.40	Seeds of caraway	Free	Free	Free	Free
0909.50	Seeds of fennel; juniper berries	Free	Free	Free	Free
09.10	Ginger, saffron, turmeric (curcuma), thyme, bay leaves, curry and other spices:				
0910.10	Ginger:				
0910.10.10	Neither crushed nor ground	15%	3.75%	15%	Free
0910.10.20	Crushed or ground	20%	5%	20%	Free
0910.20	Saffron	Free	Free	Free	Free
0910.30	Turmeric (curcuma)	Free	Free	Free	Free
0910.9	Other spices:				
0910.91	Mixtures referred to in Note 1(b) to this Chapter	Free	Free	Free	Free
0910.99	Other	Free	Free	Free	Free
20.01	Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid:				
2001.10	Cucumbers and gherkins	20%	Free	20%	Free
2001.90	Other:				
2001.90.10	Olives	25%	6.5%	25%	Free
2001.90.20	Onions	20%	Free	20%	Free
2001.90.30	Sweetcorn (*Zea mays* var. saccharata)	20%	5%	20%	Free

HS code	Description	General	EU	EFTA	SADC
2001.90.90	Other	20%	5%	20%	Free
20.02	Tomatoes prepared or preserved otherwise than by vinegar or acetic acid:				
2002.10	Tomatoes, whole or in pieces:				
2002.10.10	Frozen (excluding prepared meals)	20%	5%	20%	Free
2002.10.80	Other, in airtight metal containers	30%	27.5 c/kg less 80%	30%	Free
2002.10.90	Other	110 c/kg less 80% with a maximum of 37%	27.5 c/kg less 80% with a maximum of 9,25%	110 c/kg less 80% with a maximum of 37%	Free
2002.90	Other:				
2002.90.10	Imported from Switzerland	15%	3.75%	9.5%	Free
2002.90.90	Other	15%	3.75%	9.5%	Free
20.03	Mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid:				
2003.10	Mushrooms of the genus Agaricus				
2003.10.10	Frozen (excluding prepared meals)	20%	5%	20%	Free
2003.10.90	Other	37%	5%	37%	Free
2003.20	Truffles	Free	Free	Free	Free
2003.90	Other:				
2003.90.10	Frozen (excluding prepared meals)	20%	5%	20%	Free
2003.90.90	Other	37%	5%	37%	Free
20.04	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen (excluding products of heading 20.06)				
2004.10	Potatoes:				
2004.10.10	In the form of flours, meals or flakes	20%	5%	12.6%	Free
2004.10.90	Other	20%	5%	20%	Free
2004.90	Other vegetables and mixtures of vegetables:				
2004.90.10	Cabbages, cucumbers and gherkins	4.15 c/kg	Free	4.15 c/kg	Free
2004.90.20	Peas (*Pisum sativum*), beans (*Vigna* spp., *Phaseolus* spp.) and lentils	4.15c/kg	Free	4.15c/kg	Free
2004.90.30	Olives	25%	6.25%	25%	Free
2004.90.40	Sweetcorn (*Zea mays* var. saccharata)	20%	5%	20%	Free
2004.90.90	Other	20%	5%	20%	Free
20.05	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen (excluding products of heading 20.06):				
2005.10	Homogenized vegetables:				
2005.10.10	Imported from Switzerland	20%	5%	12.6%	Free
2005.10.90	Other	20%	5%	20%	Free
2005.20	Potatoes:				
2005.20.10	In the form of flours, meals or flakes	20%	5%	12.6%	Free
2005.20.90	Other	20%	5%	20%	Free
2005.40	Peas (*Pisum sativum*):				
2005.40.10	Preparations of flour or meal, of a kind used as infant food or for dietic or culinary	20%	5%	20%	Free

HS code	Description	General	EU	EFTA	SADC
	purposes				
2005.40.90	Other	4.15 c/kg	1.038 c/kg	4.15 c/kg	Free
2005.5	Beans (*Vigna* spp., *Phaseolus* spp.):				
2005.51	Beans, shelled	4.15 c/kg	1.038 c/kg	4.15c/kg	Free
2005.59	Other	4.15 c/kg	1.038 c/kg	4.15c/kg	Free
2005.60	Asparagus	20%	5%	20%	Free
2005.70	Olives	25%	6.25%	25%	Free
2005.80	Sweetcorn (*Zea mays* var. saccharata)	20%	5%	20%	Free
2005.9	Other vegetables and mixtures of vegetables:				
2005.91	Bamboo shoots	20%	5%	20%	Free
2005.99	Other:				
2005.99.1	Pickles, mustard, chutney and like preparations:				
2005.99.11	Imported from Switzerland	6.6 c/kg with a maximum of 25%	1.65 c/kg with a maximum of 6.25%	6.6 c/kg with a maximum of 25%	Free
2005.99.12	Other	6.6 c/kg with a maximum of 25%	1.65 c/kg with a maximum of 6.25%	6.6 c/kg with a maximum of 25%	Free
2005.99.2	Lentils, cucumbers and gherkins:				
2005.99.21	Imported from Switzerland	4.15 c/kg	Free	Free	Free
2005.99.22	Other	4.15 c/kg	Free	4.15 c/kg	Free
2005.99.3	Sauerkraut:				
2005.99.31	Imported from Switzerland	4.15 c/kg	Free	Free	Free
2005.99.32	Other	4.15 c/kg	Free	4.15 c/kg	Free
2005.99.9	Other:				
2005.99.91	Imported from Switzerland	20%	5%	12.6%	Free
2005.99.99	Other	20%	5%	20%	Free
2006.00	Vegetables, fruit, nuts, fruit-peel and other parts of plants, preserved by sugar (drained, glacé or crystallized):				
2006.00.10	Candied peel	Free	Free	Free	Free
2006.00.20	Crystallized fruits	7.25 c/kg with a maximum of 22%	Free	7.25 c/kg with a maximum of 22%	Free
2006.00.30	Cherries, drained or glacé	20% or 215 c/kg less 80%	5% or 53.75 c/kg less 80%	20% or 215 c/kg less 80%	Free
2006.00.40	Sweetcorn (*Zea mays* var. saccharata)	30% or 7.25 c/kg	7,5% or 1.813 c/kg	30% or 7.25 c/kg	Free
2006.00.90	Other	7,25c/kg with a maximum of 22%	1.813 c/kg with a maximum of 5,5%	7.25 c/kg with a maximum of 22%	Free
20.07	Jams, fruit jellies, marmalades, fruit or nut pureé and fruit or nut pastes, obtained by cooking, whether or not containing added sugar or other sweetening matter:				
2007.10	Homogenized preparations	30% or 4.5c/kg	Free	Free	Free
2007.9	Other:				

HS code	Description	General	EU	EFTA	SADC
2007.91	Citrus fruit	30% or 4.5c/kg	Free	30% or 4.5c/kg	Free
2007.99	Other	30% or 4.5c/kg	Free	Free	Free
20.08	Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included:				
2008.1	Nuts, groundnuts and other seeds, whether or not mixed together:				
2008.11	Groundnuts:				
2008.11.10	Peanut butter	0.99 c/kg	Free	Free	Free
2008.11.20	Groundnuts, roasted	0.99 c/kg	Free	Free	Free
2008.11.90	Other	0.99 c/kg	Free	0.99 c/kg	Free
2008.19	Other including mixtures	Free	Free	Free	Free
2008.20	Pineapples	55%	Free	55%	Free
2008.30	Citrus fruit	5%	Free	5%	Free
2008.40	Pears	5%	Free	5%	Free
2008.50	Apricots	5%	Free	5%	Free
2008.60	Cherries	5%	Free	5%	Free
2008.70	Peaches, including nectarines	5%	Free	5%	Free
2008.80	Strawberries	5%	Free	5%	Free
2008.9	Other, including mixtures other than those of subheading 2008.19:				
2008.91	Palm hearts	20%	5%	12.6%	Free
2008.92	Mixtures	5%	Free	5%	Free
2008.99	Other				
2008.99.40	Tamarinds	Free	Free	Free	Free
2008.99.50	Ginger preserved in syrup, in immediate packings of a content of 45 kg or more	Free	Free	Free	Free
2008.99.60	Sweet corn (*Zea mays* var. saccharata)	5%	Free	5%	Free
2008.99.90	Other	5%	Free	5%	Free
20.09	Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter:				
2009.1	Orange juice:				
2009.11	Frozen	25%	Free	25%	Free
2009.12	Not frozen, of a Brix value not exceeding 20	25%	Free	25%	Free
2009.19	Other	25%	Free	25%	Free
2009.2	Grapefruit (including pomelo) juice:				
2009.21	Of a Brix value not exceeding 20	25%	Free	25%	Free
2009.29	Other	25%	Free	25%	Free
2009.3	Juice of any other single citrus fruit:				
2009.31	Of a Brix value not exceeding 20	25%	Free	25%	Free
2009.39	Other	25%	Free	25%	Free
2009.4	Pineapple juice:				
2009.41	Of a Brix value not exceeding 20	25%	Free	25%	Free
2009.49	Other	25%	Free	25%	Free

HS code	Description	General	EU	EFTA	SADC
2009.50	Tomato juice	25%	Free	25%	Free
2009.6	Grape juice (including grape must):				
2009.61	Of a Brix value not exceeding 30	5%	1.25%	5%	Free
2009.69	Other	5%	1.25%	5%	Free
2009.7	Apple juice:				
2009.71	Of a Brix value not exceeding 20	Free	Free	Free	Free
2009.79	Other	Free	Free	Free	Free
2009.80	Juice of any other single fruit or vegetable:				
2009.80.10	Fruit juices	20%	5%	20%	Free
2009.80.20	Vegetable juices	25%	Free	25%	Free
2009.90	Mixtures of juices:				
2009.90.10	Fruit juices	20%	Free	20%	Free
2009.90.20	Vegetable juices	25%	Free	25%	Free

Source: South African Revenue Services, Schedule No. 1 Part 1, Ordinary Customs Duty.

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