

Ex-post Evaluation EU-SADC EPA

8 November 2023

Theo Boshoff

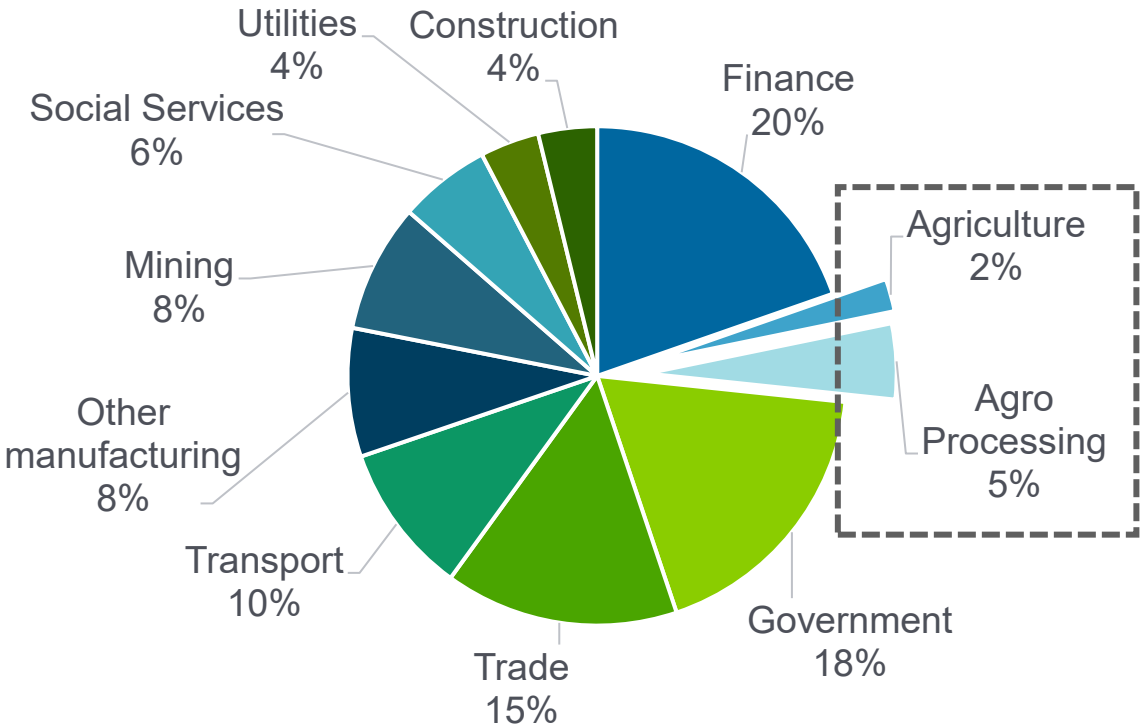


NB points to consider

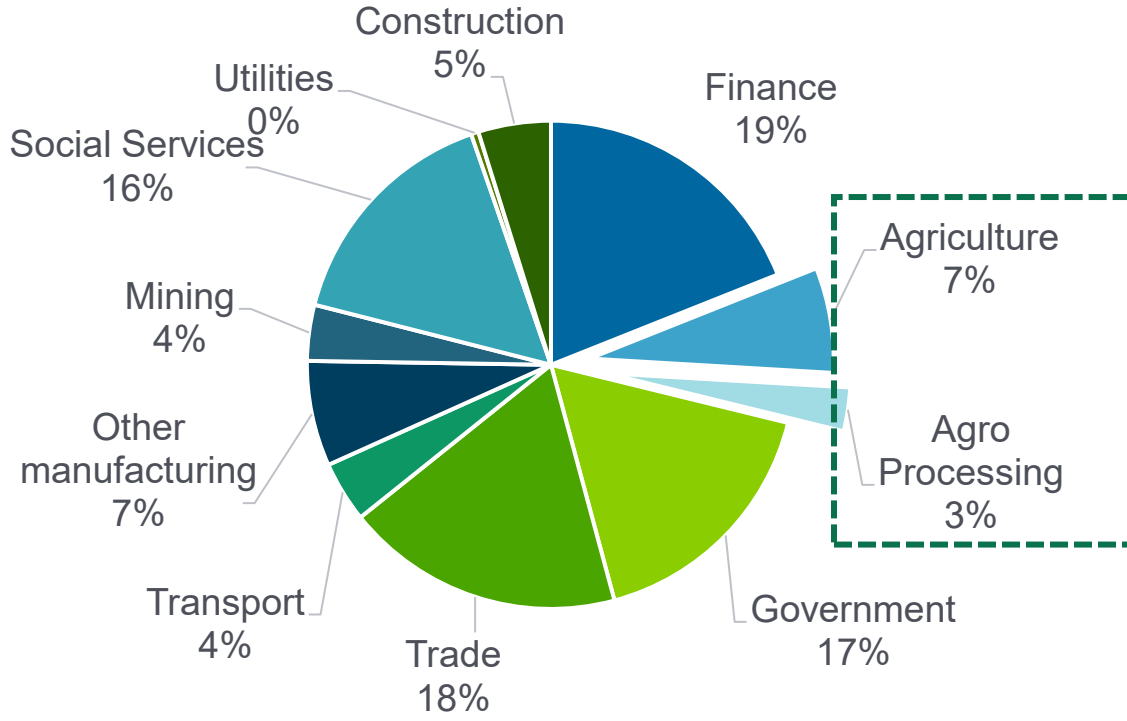
- SA exports 52% of its agricultural products in value terms;
- Employs +/- 900 000 people in primary ag, +/-600 000 in secondary sector;
- Export-orientated industries the most labour intensive (i.e. fruit, nut & wine);
- Knock-on impact on tourism & hospitality;
- We do not compete with producers in the EU;
 - Southern Hemisphere counter seasonality;
 - SA agri keeps EU shelves stocked year-round;
 - EU agri keep SA shelves stocked year-round.

SA's agriculture's contribution to the economy

SA GDP

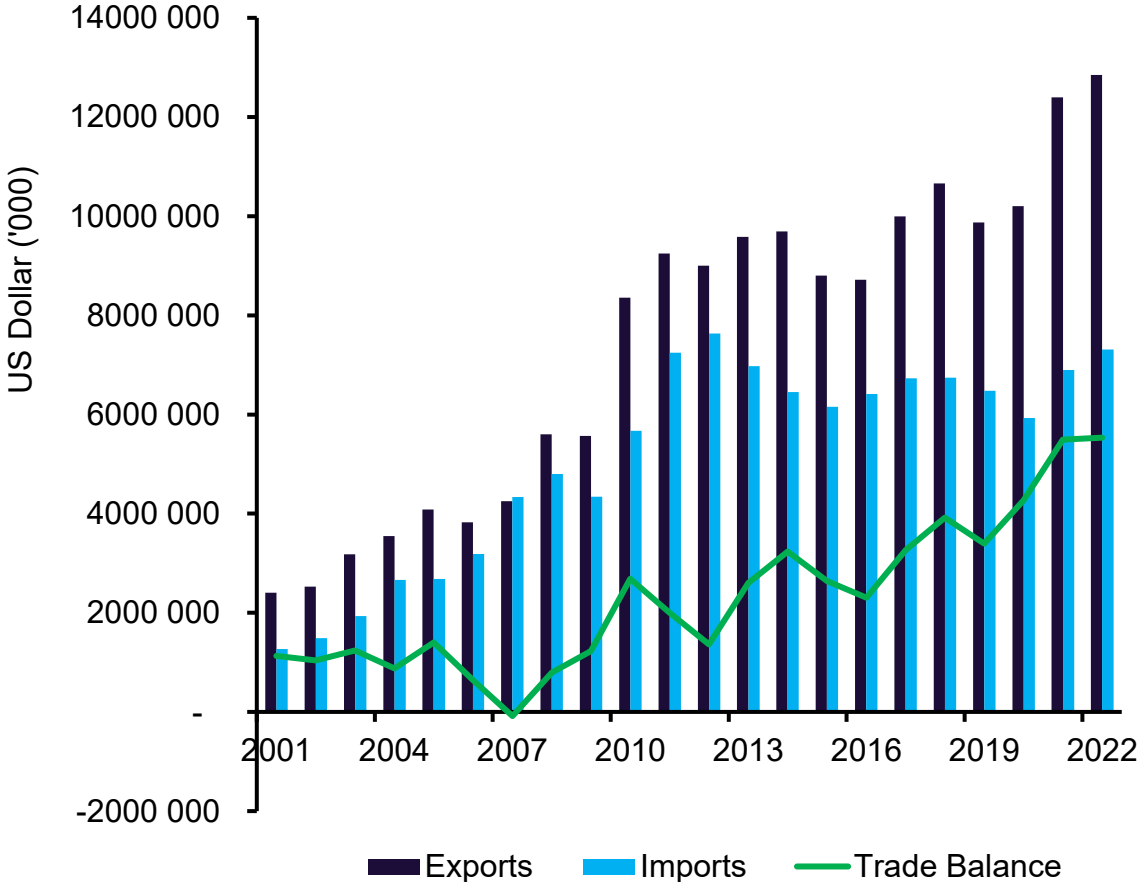


SA Employment

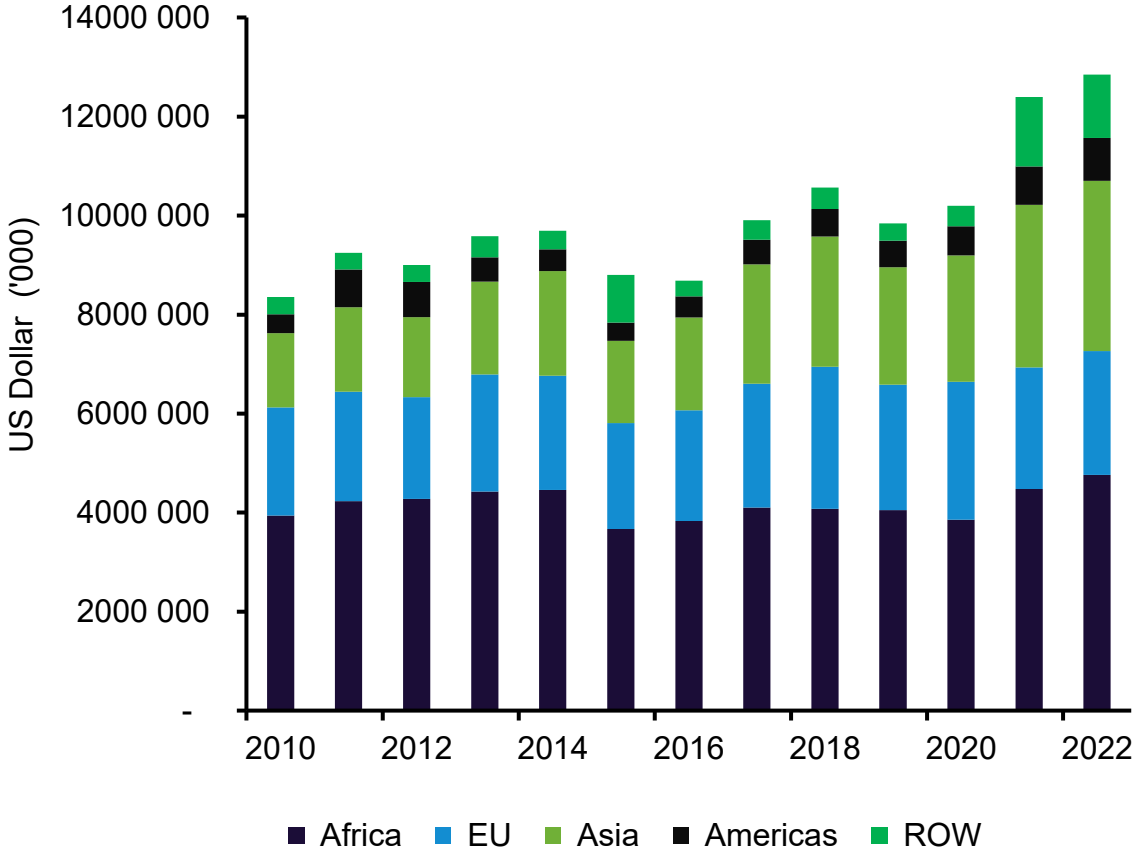


SA's agricultural growth is export-led but rising protectionism is a new challenge

SA agriculture trade

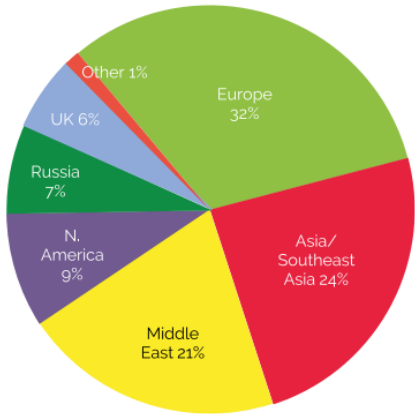


SA agriculture exports by region

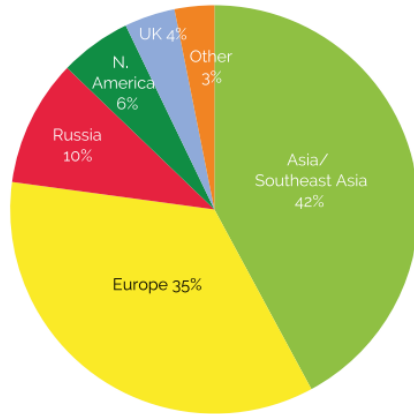


Importance of EU market

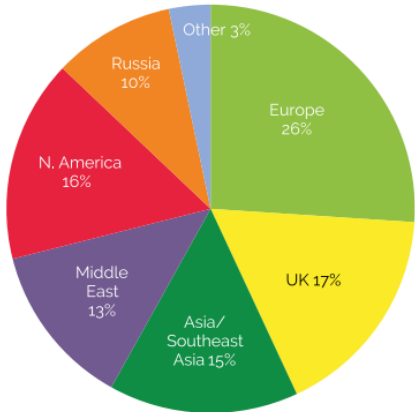
Oranges



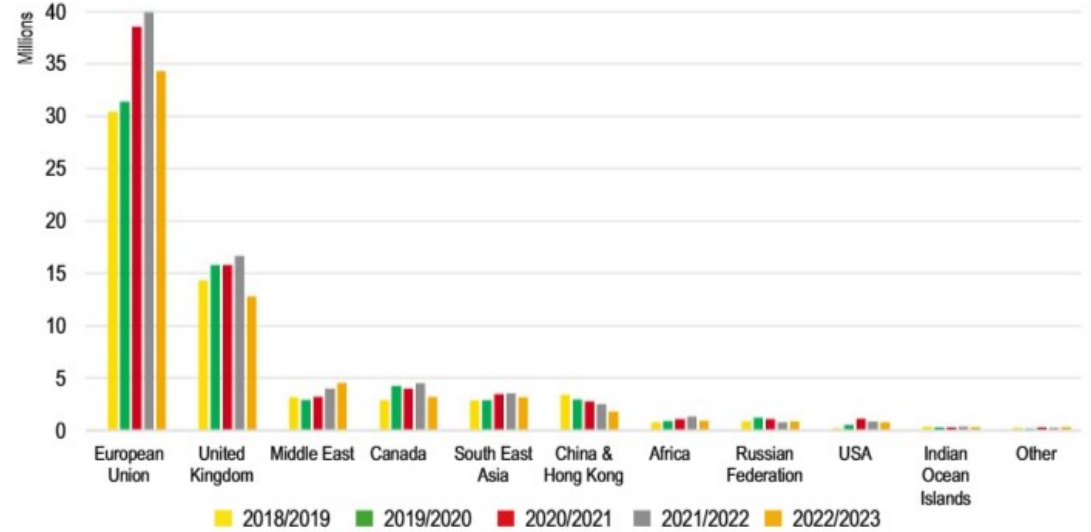
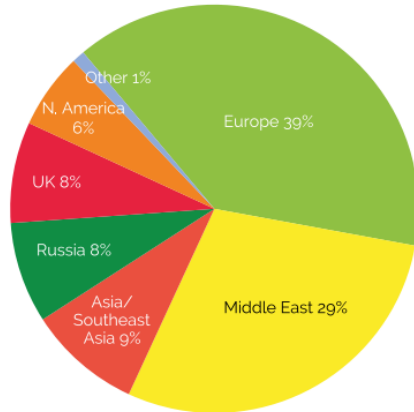
Grapefruit



Mandarins

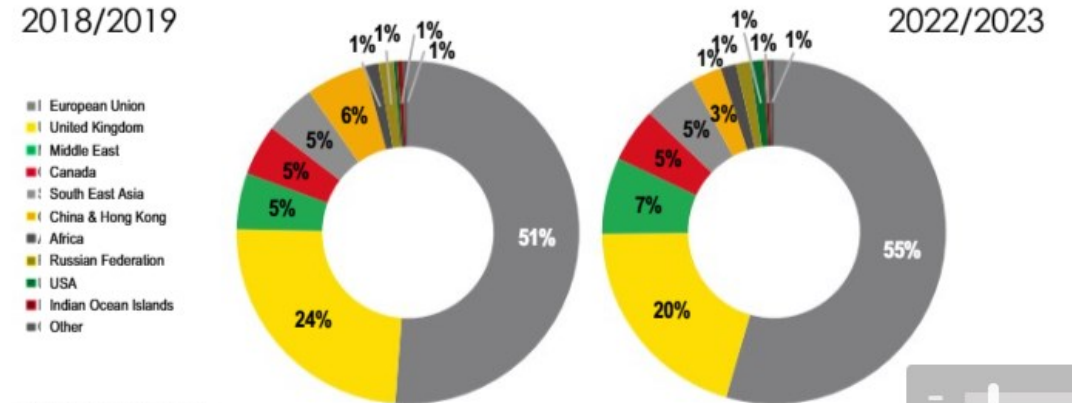


Lemons

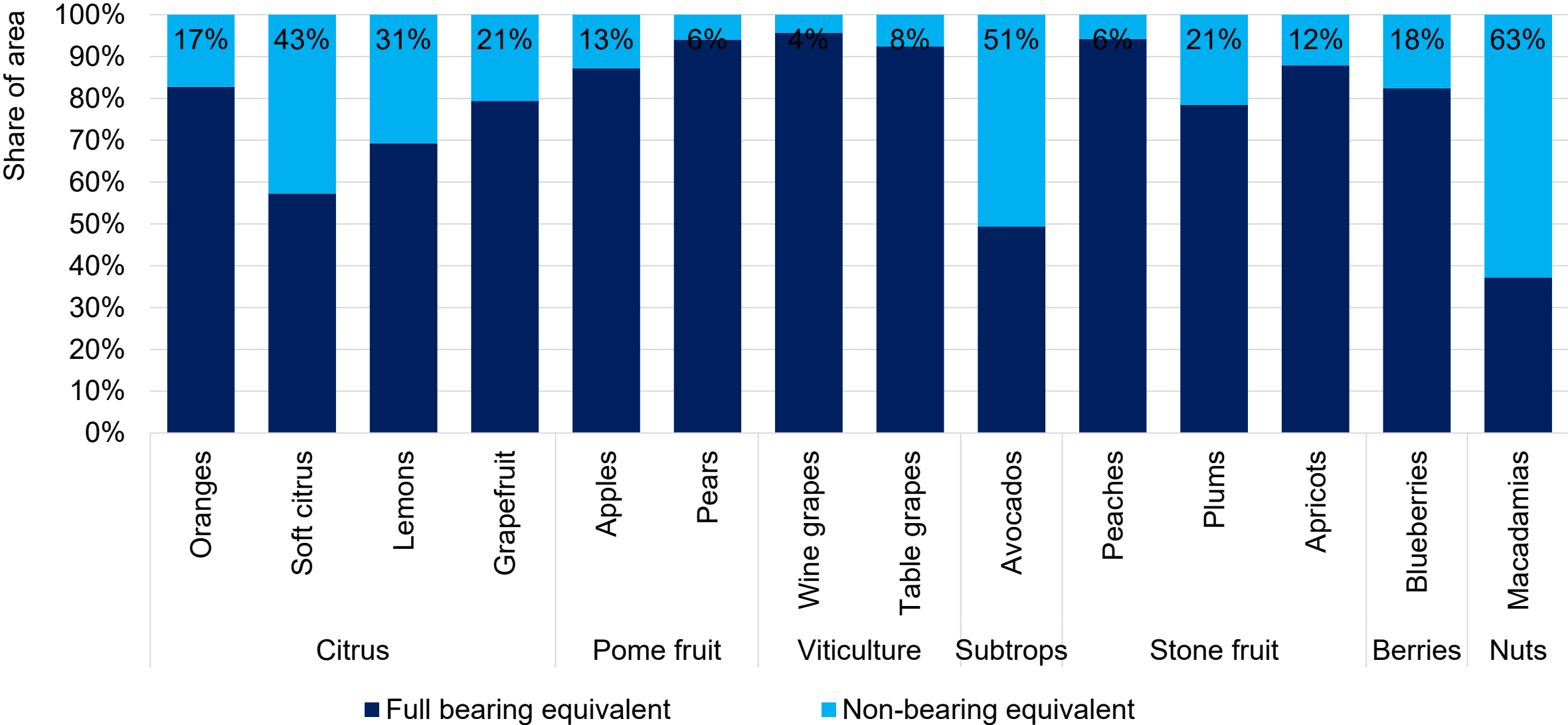


MARKET DISTRIBUTION

2018/2019



Large share of total area not yet in full production, and will require export markets



Share of black farmers in commercial agricultural output (Average 2015-2020)

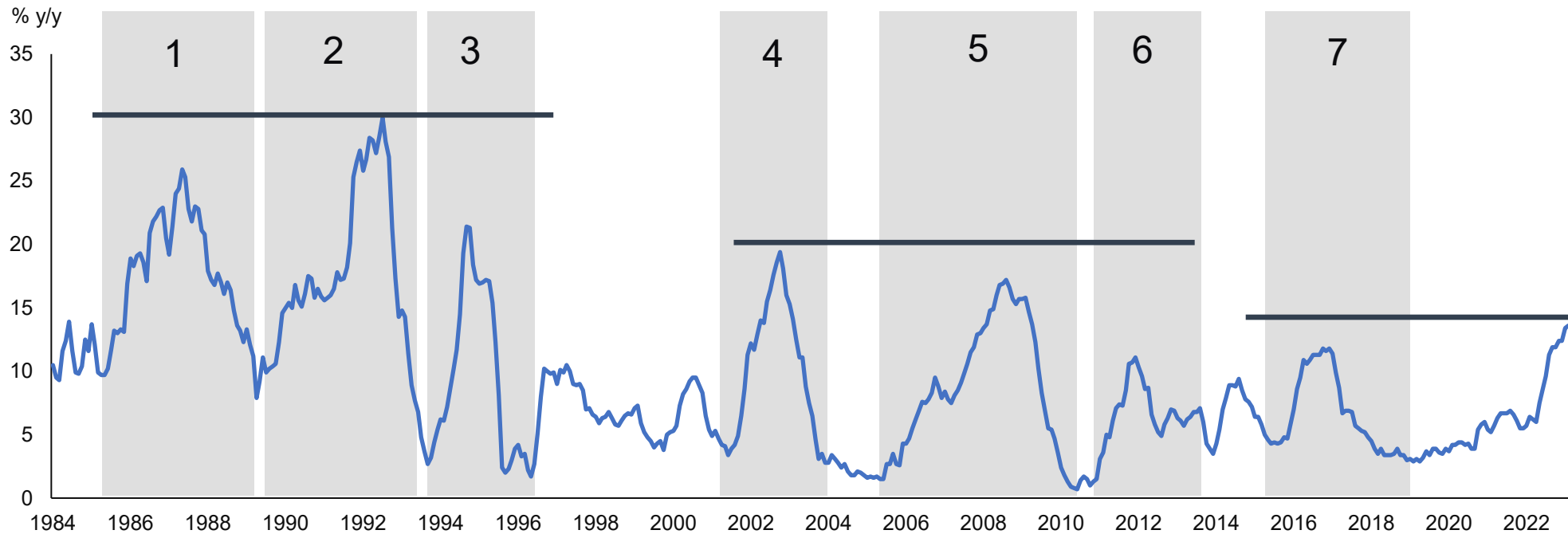
Commodity	Black Farmer Share in Output
Maize	4.7%
Soybeans	3.1%
Wheat	1.3%
Cotton	2.4%
Citrus	12.8%
Deciduous fruit	10.2%
Viticulture	1.6%
Potato	1.0%
Tomato	8.6%
Wool	11.0%
Mohair	12.8%
Cattle	34.0%
Poultry	4.2%

EU market access prompted investments into ethical trade practices



SA food price inflation cycles

Do exports increase the price of our domestic food?



Potential issues going forward

- Farm to Fork strategy & Minimum Residue levels;
- Carbon Border Tax Measures (CBAM);
- Evidence-based phytosanitary measures;
- Citrus Black Spot & False Codling Moth;
- Avian Influenza;
- Foot and Mouth;
- Wine quotas – bulk vs bottled.

Thank you

Grain Building, 1st Floor, 477 Witherite Street, The Willows, Pretoria, South Africa, 0184

PO Box 76297, Lynnwood Ridge, South Africa, 0040

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

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

Vat nr. 4920204684

