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Food Service - Hotel Restaurant Institutional

Demand Continues to Grow for Consumer-Oriented Products

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Report Highlights:

South Africa's retail food sector contracted slightly after the 2010 FIFA World Cup. However, the country's popularity as a tourism destination continues to grow and holds great potential for U.S. exports of consumer-oriented products. In the first eight months of 2011, U.S. agricultural exports of consumer-oriented products jumped by 43 percent compared to the previous year.

SECTION 1: MARKET SUMMARY

South Africa, with a population of about 51 million people (approximately 52 percent females), has a large and competitive HRI food service sector. The population's households of 13.8 million are spread through the nine Provinces and have an average size of 3.6 people. The nine Provinces include Eastern Cape (6.8 million), Free State (2.8 million), Gauteng (11.3 million), Kwazulu-Natal (10.8 million), Limpopo (5.6 million), Mpumalanga (3.7 million), Northern Cape (1.1 million), North West (3.3 million), and the Western Cape (5.3 million). Gauteng has the largest share of the South African population with 22.4 percent, whereas the Northern Cape remains the province with the smallest share with 2.2 percent.

The South African food service industry is still benefiting from the increased exposure and investments since the 2010 FIFA World Cup. According to South African data, agricultural, fish, and forestry imports increased for the third straight year since 2008. In the first eight months of 2011, imports surged by 31 percent compared to the same timeframe in 2010. U.S. agricultural exports benefited from increased demand as U.S. agricultural exports of consumer-oriented products jumped by 43 percent in the first eight months of 2011 compared to the previous year.

The sector is concentrated and dominated by independent and franchised foodservice players. It includes contract catering who tailor their services and products to high-end consumers. In general, the players do not import food and beverages directly; instead they buy local and imported products from local manufacturers, wholesalers, and distributors. In order to capture consumer traffic, convenience stores, shopping malls, supermarkets, and airports play a vital role within the industry.

The foodservice establishment is comprised of commercial, institutions and service sectors. Classified under commercial are hotels, restaurants, fast food independents, fast food chains, clubs, and national parks/resorts. Within the commercial sector, the franchise industry continues to grow due to consumption shifting from eating at home.

The institutions and service sectors include transport services, health (public and private hospitals), educational institutions, and prisons. It is dominated by a few large contract catering companies like Fedies (owned by Tsebo Outsourcing Group), Kagiso Khulani Supervision Food Services (owned by Compass Group Southern Africa), and Royal Mnandi (owned by MvelaServe Group).

The South Africa tourism industry is a major contributor to the domestic economy, contributing approximately seven percent of employment. In addition, South Africa's popularity as a business tourism destination is growing and holds great potential for the HRI food service sector. The growth of the industry offers export opportunities to U.S. suppliers of food and beverage products for hotels, restaurants, and the institutional food service sector.

1.1: Food and Beverage Income Estimates

According to Statistics South Africa, the total income generated by the food and beverages industry for the year ending in July 2011 amounted to \$511 million, an increase of 5.2 percent compared to the previous year. The main contributor was food sales with a 5.5 percent increase. A table below shows income estimates.

Table 1: Income Estimates

Estimates per type of Income	July 2011 (\$ million)	% change between July 2010 and July 2011	% change between January to July 2010 and January to July 2011
Income from food sales	440	5.5	5.8
Income from bar sales	62	5.2	2.4
Other income	9	-11.5	-11.4
Total income 1/	511	5.2	5.0

Source: Statistics South Africa (Stats SA)

Table 2: Advantages and Challenges Facing U.S. Products in South Africa

Advantages	Challenges
South Africa is the gateway for regional markets. Visit USDA's website at www.fas.usda.gov/agx/trade_events/trade_events.asp for promotional opportunities and trade shows in the country.	Strong competition from other countries and from local food producers. Despite quality not always consistent, price is still a strong decision making factor in the industry.
South Africans are developing a taste for western foods and are willing to try new products.	Consumers may need to be educated in preparing and eating products.
The growing HRI food industry needs imported food and beverage products.	Already acquired tastes and preferences for traditional locally produced products.
Established HRI industry.	While sophisticated for a developing country, much of the U.S. technologies are far beyond the horizons of the most richly-resourced food companies.
South African HRI, processors and importers seek suppliers who can offer reliable and quality products at competitive prices.	Challenges for U.S. suppliers to respond to trade inquiries in a timely fashion. Also, South Africa is a smaller market and may not be able to deal in the volumes that U.S. companies are used to.
South African consumers view U.S. products as high quality.	Limited knowledge of the variety and quality of U.S. products.
English is one of the 11 official South African languages and virtually everyone is proficient in English.	Processors have long-standing relationships with European suppliers due to historical ties.
Importers and distributors can help develop heavy brand loyalty.	Consumers are price-conscious and some do not exhibit brand loyalty. Products must constantly be promoted.
South African importers seek suppliers who can offer reliable and quality products, consolidators of mix containers at competitive prices.	Higher prices for U.S. food products relative to local market and neighboring countries' products.

SECTION 2: ROAD MAP FOR MARKET ENTRY

2.1 Hotels and Resorts

There are an estimated 30,000 establishments nationally in South Africa, ranging from five star hotels, including hotel chains, game lodges and bed & breakfast (B&B), to more economical options, such as youth hostels. Out of all establishments, the B&B and game lodges represent the fastest growing segment of the tourism industry. In the Hospitality Resort and Hotel area, many are managed by the Premier Group, owned by Anglo American. Premier and Anglo American also have

extensive holdings in the milling, baking, dairy, fish, confectionery, and edible oils industries.

The Department of Environmental Affairs and Tourism (www.environment.gov.za) is responsible for the growth and the development of South Africa tourism. The Department has mandated the Tourism Grading Council of South Africa (www.tourismgrading.co.za) to grade tourism establishments in the country and oversee the quality control. The Council employs a five star grading system, which is displayed on most advertising material and at hotel entrances. It has graded approximately over 8,000 establishments since 2003. Grading and registration fees are made available on the Tourism Grading website. Establishments are assessed according to the type of accommodation they provide:

- Bed & Breakfast (B&Bs)
- Guest houses
- Hotels
- Self-catering
- Backpacker and hostelling
- Caravans and camping
- Country houses
- Meetings, exhibitions and special events
- Restaurants

Prospects: Despite the economic recession, the long term outlook for the hotel industry remains healthy. Foreign and domestic tourists are key sources of demand for hotel accommodations. The latest trend in hotel investment in South Africa has been joint ventures between local operators and overseas investors. Smaller and independent owners are benefiting from an injection of capital, infrastructure, and expertise enabling them to compete with large groups.

2.1.1 Accommodation Statistics

The Statistics South Africa figures reveal a drop of 12.3 percent of the total income for the industry for the year ending in July 2011 compared to the previous year. Income from accommodations alone decreased by 24.1 percent. The main factor for the decline was normalization in the wake of the 2010 FIFA Soccer World Cup between June 11 and July 11, 2010. However, growth in the hotel industry is linked to foreign tourism, which is expected to grow considerably in the future.

Table 3: Key Estimates for July 2011

Estimates	July 2011	Percentage change between July 2010 and July 2011	Percentage change between January to July 2010 and January to July 2011
Stay units available ('000) 1/	111.4	-2.6	-2.8
Stay unit nights sold ('000)	1 498.9	-3.6	-9.6
Average income per unit night sold (\$)	92	-21.3	-9.3
Income from accommodation (\$ million)	137	-24.1	-18.1
Total income (\$ million) 2/	251	-12.3	-10.8

Note:

1/ Stay unit refers to the unit of accommodation that is available to be charged out to guests, for example, a powered site in a caravan park or a room in a hotel.

2/ Figures have been rounded off. Therefore, discrepancies may occur between sums of the component items and the totals.

Table 4: Contribution of Each Type of Accommodation to the Annual Percentage Change

Type of accommodation	July 2010 (\$ million)	Weight 1/	July 2011 (\$ million)	Percentage Change between July 2010 and July 2011	% change Contribution 2/
Hotels 3/	140	74.2	95	-29.4	-21.8
Caravan parks and camping sites	0.5	0.3	1.2	137.1	0.4
Guest-houses and guest-farms	9	4.7	8.7	2.5	0.1
Other accommodation	38	20.8	33	-13.2	-2.7
Total industry 4/	187.5	100.0	137.9	-24.1	-24.1

Source: Statistics South Africa

1/ Weight is the percentage of each type of accommodation to the total accommodation income for current month of the previous year.

2/ The contribution to the percentage change is calculated by multiplying the percentage change of each type of accommodation with the corresponding weight, divided by 100.

3/ These are tax registered private and public enterprises that are mainly engaged in providing short-stay commercial accommodation such as:

- Hotels, motels, and inns;
- Caravan parks and camping sites;
- Guest-houses and guest-farms; and
- Other accommodation

4/ The figures have been rounded off. Therefore discrepancies may occur between the sums of the component items and totals.

2.1.2 Hotel Profiles

Most of the key hotels are owned by large locally listed companies and managed through agreements with international hotel management chains, in particular, Mercure Accord Hotel (French), Sheraton Group (US), Hilton (US), Legacy Hotels and Resorts (US), and Days Inn (US). In addition to major foreign tourism projects, two South African groups also have activities. One group is the Sun International Group, which runs hotels and resorts including the renowned Sun City Resort in Pilanesburg in the North West Province. Another one is the Protea Group, which runs the Protea Hotel chain. The table below provides an overview of some of the major hotel chains.

Table 5: Leading Hotel Chains in South Africa

Hotel Group	Sales (US\$ million)	No. of Hotels	Location	Purchasing Agent Type
Mercure Accord	Not available	28	Major cities and Tourist centers	Local agents
Sheraton Group	Not available	3	Major cities	Local agents
Hilton	Not available	2	Major cities	Local agents
Legacy Hotels &	Not available	17	Major cities and	Local agents

Resorts			Tourist centers	
Sun International Groups	Not available	49	Major cities and Tourist centers	Local agents
Protea Group	Not available	74	Major cities and Tourist centers	Local agents

2.1.3 Entry Strategy

Although the majority of the hotels are part of hotel chains, each one operates autonomously in terms of food purchases. In some cases the head office may recommend regional or national suppliers, but generally, hotels have a free reign regarding what foods are served and whom their suppliers are. Dry groceries are usually sourced from catering wholesalers. Baked goods, fruits and vegetables, meat, and dairy products tend to be sourced from local specialist retailers. Many hotels also have in-house bakeries and contract caterers to run in-house restaurants.

2.1.4 Distribution Channel

In general, hotels do not import food and beverages; instead they place their orders through local manufacturers, wholesalers, specialty retailers and others. This is because most, if not all, hotel kitchens have a policy of holding only sufficient quantities of food and beverages for short-term needs. The following table highlights and summarizes sources of supply in percentage.

Table 6: Hotel Food and Beverage Supplier Breakdown

Sources of supply	% of total
Specialist Retailers	32
Direct from manufacturers	28
Catering wholesalers	20
Fresh Produce Market	12
Cash & Carry	5
General Retailer	3
TOTAL	100

2.2 Restaurants

Restaurants play an integral part in the tourists' experience as food and wine play a major role for visitors. Foreign visitors spend approximately \$30 per day on food and beverage during their trip to South Africa, which represents about 20 percent of the total daily expenditure. Since tourism is such an important source of revenue for the restaurant industry, the Tourism Grading Council is responsible for the grading scheme. To have an effective scheme, the Grading Council continuously hosts countrywide road shows on restaurant grading in order to meet the Council's target of all restaurants graded.

The Restaurant Association of South Africa (RASA) (www.restaurant.org.za), acts in the interest of the South African restaurant industry. RASA members range from independent restaurants, fast food outlets, coffee shops, casual dining establishments, hospital canteens, mobile restaurants, Quick Service Restaurants (QSR's), and include memberships for the major franchise groups.

South Africa has a highly developed network of fast-food and chain restaurants and a well established franchising model. In addition, the Franchise Association South Africa (FASA) (www.fasa.co.za)

shows how people are opting to eat out more often than ever before. This shift is creating opportunities in the restaurant industry. However, fast food restaurants are facing increased competition from supermarkets, retail chains, and convenience stores as they also offer readymade meals.

Prospects: The restaurant sector benefits from the tourism and the shifting trends of more domestic consumers eating meals away from home. As a result, imports of food and beverage products are expected to increase.

2.2.1 Income Estimates by Types of Enterprises

The major contributor to the annual growth in total restaurant industry income as of July 2011 was take-away and fast food outlets as illustrated in table 7.

Table 7: Contribution by Types of Enterprise to Total Income

Type of Enterprise estimates	July 2010 (\$ million)	Weight 1/	July 2010 (\$ million)	% change Between July 2010 to July 2011	Contribution to the Percentage Change 2/
Restaurants and Coffee Shops	6	55.9	274	0.7	0.4
Take-away and fast food outlets	138	27.1	156	15.1	4.2
Catering Services 3/	79	16.2	81	3.2	0.5
Total Industry 4/	487	100.0	511	5.2	5.2

Source: Statistics SA

2.2.2 Restaurant Company Profiles

South Africa has an extensive number of domestic and international restaurant chains. It includes Famous Brand, King Consolidated Holdings; Taste Holdings, Nando's Group Holdings, McDonalds, Mike's Kitchen, Global Wrapps, Dulce Continental Cafes, the Spur Group, Something Fishy, Ocean Basket, Pleasure Foods, Chicken Licken, News Café, Pizza Perfect, Leisure Net, Flame Diners, Max Frango's Chicken take-outs, Shoprite-Checkers, Tricon Global Restaurants Inc (Kentucky Fried Chicken, Pizza Hut, and Yum Restaurants), Subway Sandwiches, and TGIF's.

Table 8: Leading South African Multi-National Fast-Food and Family Restaurant Companies

Restaurant Name and Outlet Type	Ownership	Sales (US\$ million)	No. of outlets	Location	Purchasing Agent Type
The Famous Brand	International	Not available	509	Major cities	Local agent
Tricon Global Restaurants	Local	Not available	450	Major cities	Local agent
Nando's Group	Local	Not available	195	Major cities	Local agent
King Consolidated Holdings	Local	Not available	188	Major cities	Local agent

2.2.3 Entry Strategy

Specialist retailers such as bakeries, butcheries, and green grocers are the main suppliers to restaurants. Dry groceries are often purchased through wholesalers, while perishables and frozen

products are purchased directly from the manufacturers or designated distributors.

- Export opportunities in this sector may not be readily apparent since these outlets generally prefer to source their inputs locally. However, as the number of outlets increase and competition rises, it becomes more difficult to meet needs on the local market and maintain quality and price competitiveness.
- The South African fast food market continues to witness strong growth due to changes in lifestyle and growth in disposable income.
- Although independent restaurants are plentiful, the growth in the number of franchised fast food chain restaurants has been phenomenal over the past number of years. The situation has brought interest in American-style cuisine and consumption patterns.
- Tex-Mex or South Western cuisine has yet to significantly penetrate the South African market. The cuisine has potential to be popular due to the South African consumer's preference for hot and spicy sauces.
- Pub-style restaurants are also booming.
- More information about the franchise sector visit www.whichfranchise.co.za and www.fasa.co.za.

2.2.4 Distribution Channel

Table 9: Suppliers to the Restaurant Industry

Sources of Supply	% of Total
Specialist retailers	42
Catering wholesalers	23
Manufacturers/distributors	20
Cash & Carry	8
General retailers	5
Fresh produce markets	2
TOTAL	100

2.3 Institutional Food Service

Currently, the South African institutional sector is valued at \$71 million and 80 percent of the market is run through State tenders and parastatals. This sector constitutes a very large market for food and beverages and includes various institutions and services providers. It is estimated that only 28 percent of the public sector and 55 percent of the private sector catering has been out-sourced to contract caterers. As with the rest of the South African food industry, this sector is fairly concentrated and is dominated by a relatively few large catering companies. The South African food services contract caterers include Fedics, Royal Sechaba, KKS, Royal Mnandi, Feedem Pitseng, and Bosana.

2.3.1 Major Contract Caterer's Profile

Table 10: Leading South African Contract-Catering Companies

Name and business type	Ownership	Location	Purchasing Agent Type
Fedics (Pty) Ltd	Tsebo Outsourcing Group	nationwide	Local agents
Royal Sechaba	Royal Serve	nationwide	Local agents

Kagiso Khulani Supervision Food Services (KKS)	Compass Group Southern Africa	nationwide	Local agents
RoyalMnandi	MvelaServe	Nationwide	Local agents
Feedem Pitseng	Independent owners	nationwide	Local agents
Bosasa	Independent owners	nationwide	Local agents

2.3.2 Entry Strategy

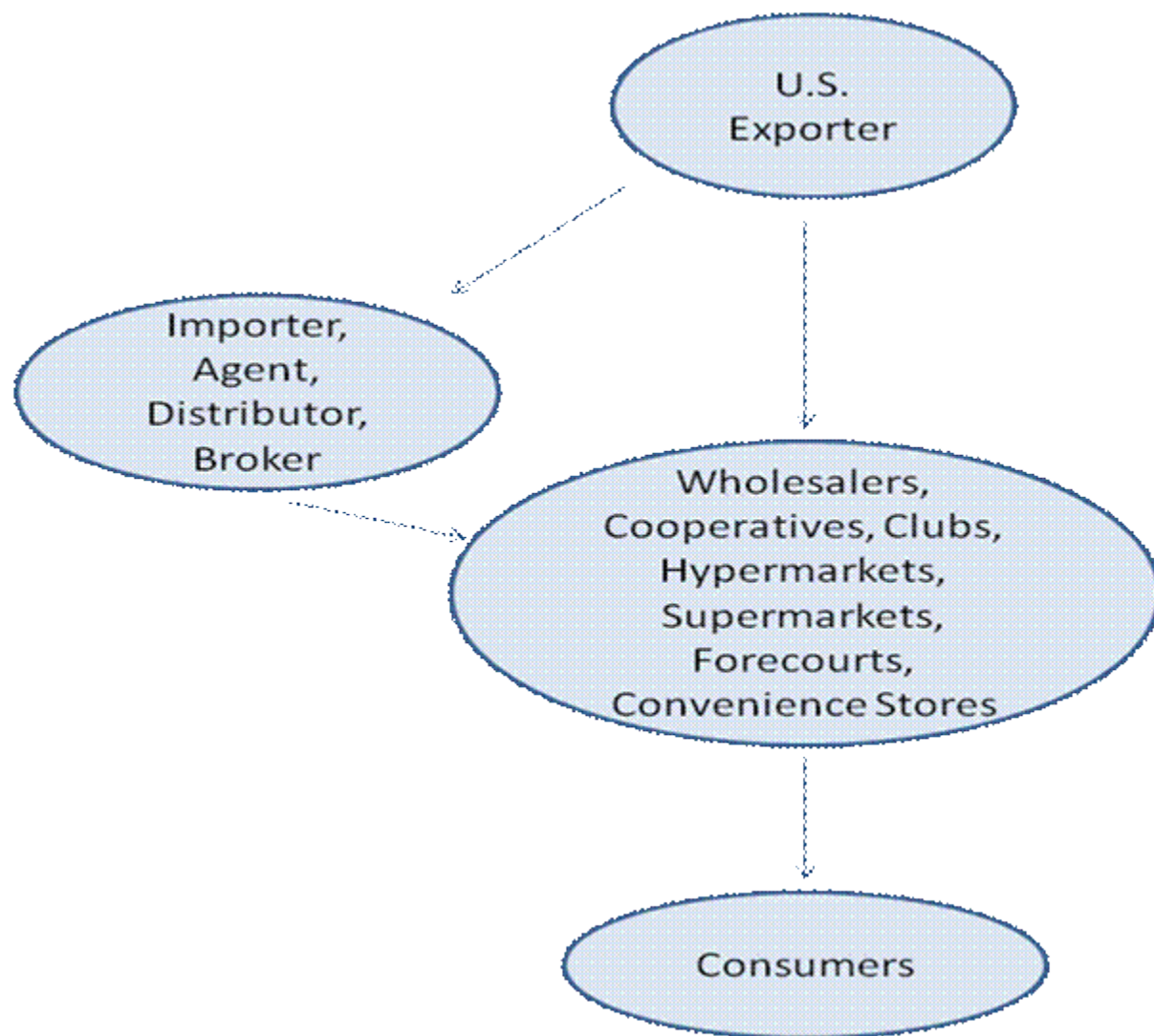
In general, contract caterers do not import food and beverages but instead purchase food products directly from the local manufacturers, catering wholesalers, and distributors on a contract basis. Companies operating their own canteens usually buy food, when needed, from catering wholesalers and localized specialist retailers, as this is more convenient when buying small quantities.

2.3.3 Distribution Channel

Table 11: Contract-Caterer Supplier Breakdown

Source of Supply	% of Total
Specialist retailers	46
Manufacturers/distributors	33
Catering wholesalers	10
Fresh Produce Markets	5
General retailers	4
Cash & Carry	2
Total	100

2.4 Market Entry Flow Chart for U.S. Exporters



SECTION 3: COMPETITION

Table 12: South Africa Consumer Food and Edible Fishery Product Imports

South Africa Imports	January-August (US\$)			% Share			% Change 2011/2010
	2009	2010	2011	2009	2010	2011	
Consumer-Oriented Products (Total)	824,393,063	945,809,122	1,228,790,124	100	100	100	29.92
Chicken Cuts And Edible Offal (Inc Livers), Frozen	89,590,282	96,352,979	150,926,751	10.87	10.19	12.28	56.64
Food Preparations Nesoi	73,909,059	82,186,204	105,013,265	8.97	8.69	8.55	27.77
Meat & Offal Of Chickens, Not Cut In Pieces, Frozen	8,758,834	40,318,531	59,564,634	1.06	4.26	4.85	47.74
Meat Of Swine, Nesoi, Frozen	27,837,909	36,150,445	51,540,149	3.38	3.82	4.19	42.57
Dog And Cat Food, Put Up For Retail Sale	17,791,221	25,454,223	33,128,901	2.16	2.69	2.7	30.15
Enzymes And Prepared Enzymes, Nesoi	16,857,231	26,286,070	27,138,803	2.04	2.78	2.21	3.24
Dextrins And Other Modified Starches	16,126,744	24,580,111	25,083,412	1.96	2.6	2.04	2.05
Waters, Incl Mineral & Aerated, Sweetnd Or Flavord	20,048,853	20,806,768	23,753,304	2.43	2.2	1.93	14.16
Turkey Cuts And Edible Offal (Includ Liver) Frozen	15,644,781	16,222,454	23,665,426	1.9	1.72	1.93	45.88
Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi	27,109,501	19,772,190	22,391,590	3.29	2.09	1.82	13.25
Coffee Extracts, Essences Etc. & Prep Therefrom	11,051,324	17,792,589	22,162,969	1.34	1.88	1.8	24.56
Cocoa Preparations, Not In Bulk Form, Nesoi	11,578,686	14,861,701	21,096,078	1.4	1.57	1.72	41.95
Bread, Pastry, Cakes, Etc Nesoi & Puddings	11,532,106	14,294,553	19,513,504	1.4	1.51	1.59	36.51
Beer Made From Malt	78,996,596	10,480,268	17,931,037	9.58	1.11	1.46	71.09
Grape Juice, Nesoi, Nt Fortified With Vitamins/Min	8,144,646	7,114,196	17,910,635	0.99	0.75	1.46	151.76
Fish & Seafood Products (Total)	150,677,700	158,246,982	160,904,687	100	100	100	1.68
Shrimps And Prawns, Including In Shell, Frozen	19,559,796	18,414,091	34,817,149	12.98	11.64	21.64	89.08
Sardines/Sardinella/Brisling Prep/Pres, Not Minced	58,125,584	51,629,285	32,131,076	38.58	32.63	19.97	-37.77
Tunas/Skipjack/Bonito Prep/Pres Not Minced	24,544,465	25,015,738	25,996,092	16.29	15.81	16.16	3.92
Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	6,158,405	10,887,949	13,085,701	4.09	6.88	8.13	20.19
Fish, Nesoi, With Bones, Frozen	10,369,921	12,153,704	11,814,661	6.88	7.68	7.34	-2.79
Shrimps And Prawns, Prepared Or Preserved	2,888,978	3,952,981	5,844,772	1.92	2.5	3.63	47.86
Salmon, Pac, Atl & Danube, With Bones, Fr Or Chill	2,591,857	3,830,404	5,541,332	1.72	2.42	3.44	44.67
Total Agricultural, Fish & Forestry (Total)	2,591,857	3,830,404	5,541,332	100	100	100	30.88

Source: Global Trade Atlas

TABLE C: TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY

PRODUCTS

Consumer Oriented Agricultural Imports	January-August (US\$)		
	2009	2010	2011
World	824,393,063	945,809,122	1,228,790,124
Brazil	106,583,829	134,038,462	152,065,928
Netherlands	97,900,274	61,653,493	92,276,237
Germany	36,131,260	50,512,376	75,876,671
United States	42,353,509	63,697,862	75,758,359
France	65,468,529	58,676,884	72,744,465
China	50,144,253	57,288,851	64,706,776
Italy	36,966,878	40,506,754	62,013,761
United Kingdom	16,241,847	22,210,899	46,625,625
Australia	40,015,463	38,640,717	46,015,466
India	21,847,309	35,221,115	44,823,083
Canada	30,144,398	27,576,549	42,918,547
Ireland	10,657,770	30,870,624	41,683,082
Argentina	37,411,903	27,068,552	39,468,095
Belgium	15,754,785	27,580,398	38,516,938
New Zealand	21,022,526	30,304,153	38,387,325

Source: Global Trade Atlas

Fish & Seafood Products	January-August (US\$)		
	2009	2010	2011
World	150,677,700	158,246,982	160,904,687
Thailand	82,327,328	72,819,656	61,443,534
India	13,549,849	12,071,945	23,010,622
China	8,682,541	18,511,960	16,905,543
Norway	4,606,227	6,676,389	8,847,708
New Zealand	6,038,303	10,109,481	8,788,031
United States	1,857,077	2,454,300	4,524,311
Argentina	2,915,232	4,169,884	4,219,413
Mozambique	3,404,197	2,241,113	3,376,121
Spain	1,522,499	3,671,764	3,288,161
Ecuador	98,800	-	2,661,057
United Kingdom	657,578	798,822	2,031,706
Uruguay	279,181	554,469	1,832,457
Peru	2,466,493	2,232,657	1,800,403
Taiwan	1,106,723	1,498,154	1,768,358
Malaysia	2,595,941	1,854,000	1,434,767

South Africa is a member of the World Trade Organization and holds trade agreements (multilateral and bilateral) with several other nations.

Southern African Development Community (SADC): South Africa joined SADC in August 1994. The other fourteen members of SADC are: Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Swaziland, Tanzania, Zambia, and Zimbabwe. SADC's objective is to foster harmonized regional development through economic activities, including a trade protocol aimed at creating a Free Trade Area within the SADC region.

Southern African Customs Union (SACU): There are five SACU member states which comprise of Botswana, Lesotho, Namibia, South Africa, and Swaziland. In terms of the agreement, members use a common external tariff and goods are traded free of duties and quotas between member states.

The European Union (EU) is a union of twenty-seven independent states based on the European Communities and founded to enhance political, economic and social co-operation. The member states includes, Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and United Kingdom.

SECTION 4: BEST PRODUCT PROSPECTS

A. Products in the market which have good sales potential

- Sweeteners (lactose, glucose and syrup)
- Shelled nuts (almonds and walnuts)
- Flavorings (malt)
- Starches
- Protein concentrates
- Sausage casing
- Baking inputs
- Food ingredients

B. Products not present in significant quantities but have good sales potential

- Organics
- Out of season stone fruits, grapes, pomegranate, etc
- Breakfast cereal (corn/grit meal)
- Sauces
- Fruit and vegetables preparations

C. Products not present due to significant trade barriers

- Prohibition of U.S. cherries and pears.
- Anti-dumping duties imposed on U.S. frozen chicken leg quarters since 2000.
- Prohibition of U.S. beef to South Africa since 2003.

SECTION 5: POST CONTACT AND FURTHER INFORMATION

If you have any questions or comments regarding this report or need further assistance, please contact AgPretoria at the following address:

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For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service's website at: <http://www.fas.usda.gov>

**POST ACKNOWLEDGES THE FOLLOWING SOURCES OF INFORMATION: HRI
INDUSTRY WEBSITES SUCH AS, DEPARTMENT OF ENVIRONMENTAL AFFAIRS
AND TOURISM, WORLD TRADE ATLAS, STATISTICS SOUTH AFRICA:**

<http://www.statssa.gov.za/publications/P6410/P6410July2011.pdf>

<http://www.statssa.gov.za/publications/P6420/P6420July2011.pdf>