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## **South Africa - Republic of**

### **Retail Foods**

### **South African Retail Food Industry**

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**Report Highlights:**

South Africa has a well-developed retail sector. In 2013, the retail sector contributed almost 12 percent to overall GDP and reflected growth of nine percent over the past five years with total retail sales in South Africa amounting to R406.2 billion (USD \$38 billion). Retail sales are expected to grow by almost five percent per annum in the next five years and 2014 sales are projected to reach R424.8 billion (USD \$40 billion).

**Post:**

Pretoria

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## Section I: Market Summary

## Market Summary

In 2013, the retail sector contributed almost 12 percent to overall GDP and reflected growth of nine percent over the previous year. The retail and wholesale sectors employed an estimated 1,732,000 people, almost 21 percent of the national labor force. This positions the retail industry as an important sector in the overall South African economy. In 2013, total retail sales in South Africa amounted to R406.2 billion (USD \$38 billion). Retail sales have shown steady growth over the last five years and are expected to grow by almost five percent per annum in the next five years. It is projected that 2014 sales could reach R424.8 billion (USD \$40 billion).

**Table 1: Sales in the South African Retail Sector**

	<b>2013 Sales (US\$ bn)</b>	<b>2014 Sales (US\$ bn) (Estimate)</b>	<b>2008-2013 Annual Growth Rate (%)</b>	<b>2013-2018 Annual Growth Rate (Forecast %)</b>
<b>Convenience Stores</b>	\$2.0	\$2.1	8.4	2.7
<b>Discounters</b>	\$0.3	\$0.3	19.5	4.0
<b>Hypermarkets</b>	\$1.9	\$2.0	9.1	5.6
<b>Supermarkets</b>	\$16.5	\$17.1	8.4	4.7
<b>Traditional Grocery Retailers</b>	\$18.2	\$19.2	10.4	4.6
<b>Independent Small Grocers</b>	\$7.9	\$8.3	9.3	4.6
<b>Grocery Retailers</b>	\$40.6	\$42.4	9.3	4.5

**Source:** Euromonitor International

Growth in online shopping in South Africa has been slower than in many other countries but the trend is turning. The rising number of consumers that have internet access and realize its convenience coupled with better delivery services has increased online shopping.

Local retailers are aggressively expanding into other African countries giving United States' companies that do business with South African retailers a gateway to the rest of Sub-Saharan Africa. Most South African retailers have entered the Sub-Saharan Africa market successfully by exceeding projections and expectations of income. An example is South Africa's biggest retailer, Shoprite, which has already opened stores in 15 other African countries along with expanding its retail space locally.

## Retail Food Sector Opportunities and Challenges

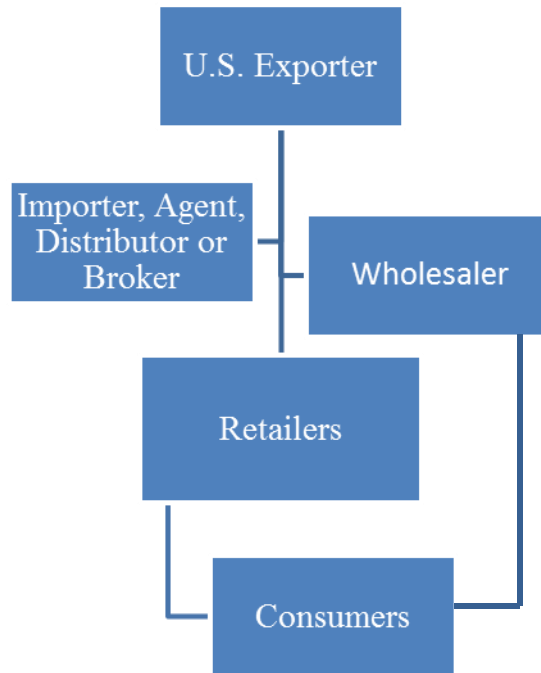
<b>Opportunities</b>	<b>Challenges</b>
<b>South Africans are developing a taste for Western foods and are willing to try new products.</b>	Consumers may need to be educated on preparing and eating new-to-the market products.
<b>The growing convenience segment in retail food industry needs imported food and beverage products.</b>	Middle to lower income consumers prefers traditional, locally produced foods.
<b>Importers and distributors can help develop brand</b>	Consumers and retailers have limited knowledge

<b>loyalty.</b>	about the variety of U.S. products available.
<b>Increasing urbanization (52% in 1990 compared to 62% in 2011)</b>	U.S. suppliers have difficulty responding to trade lead inquiries in a timely fashion.
<b>Rapidly expanding African population expected to more than double to 2.4 billion by 2050.</b>	High-import tariff rates faced by U.S. suppliers compared to the European competitors due to the South African-EU Free Trade Agreements.
<b>A growing young population which tends to processed, easily-available foods and that are active users of the internet and mobile devices.</b>	Differences in consumer classes and regions are distinct.
<b>U.S. exports to sub-Saharan Africa have increased by more than 200% from 2002-2012, while exports to the EU have only increased by 50%.</b>	Brand quality, price and advertisement matter to this population.
<b>Sub-Saharan Africa will lead all regions except South Asia in growth of food sales which are expected to increase nearly by 60% over the next decade.</b>	Europe is still Africa's stronger importer. The EU has free market access to South Africa and preferential access to sub-Saharan Africa.
<b>Stabilization of the South African macroeconomics and politics.</b>	Predominant challenges with infrastructure and political corruption.

## Section II: Road Map for Market Entry

### *Entry Strategy*

The South African retail market could be very sophisticated and complex. A good entry strategy should consider that the top ten percent of the population earns forty-five percent of the national income and that most large retail centers are located in the five metropolitan regions. Lower to middle income groups are very conservative and tend to stick to known brands. The new-to-market exporter should also take into account that the South African retail market could be a stepping stone to develop market opportunities in the rest of Sub-Saharan Africa, even though differences in infrastructure, financial services, and culture exist. Low-risk entry strategies should be evaluated to enter into the South African food retail market. Exporting through agents or representatives would give a new-to-market entity advantages and is the safest way to enter the South African retail food market.



### ***Market Structure***

Retail supermarket chains maintain their own distribution systems using modern warehouses to allocate goods to supermarket branches. Imports are handled by the supermarket chain's head office, their importer or by branches themselves. This structure allows U.S. exporters to make agreements of trade directly with the retail stores that will distribute the products to the consumer. However, trends in the distribution channels show that some of the supermarkets are moving towards outsourcing the services of warehousing and transportation meaning that the U.S. exporter can also access the market through independent agents or distributors.

The Consumer Goods Council of South Africa (CGCSA) is an organization that acts as the representative body of the entire consumer goods industry. It is comprised of more than 12,000 member companies, large and small, across the consumer goods value chain – including the retail, wholesale and manufacturing sectors. The CGCSA facilitates engagement between stakeholders in the industry. Visit their website for useful contacts and more insights on the industry: [www.cgcsa.co.za](http://www.cgcsa.co.za)

For information on meat importers and exporters in South Africa please visit the Association of Meat Importers and Exporters' (AMIE) of South Africa website: [www.amiesa.co.za](http://www.amiesa.co.za)

### **Super Stores, Supermarkets, Hypermarkets, or Super Centers, Club and Warehouse Outlets**

The South African retail food sector is very sophisticated and developed relative to other markets in the African continent. Five major, locally owned, corporations dominate the industry operating warehouses, wholesale outlets, hypermarkets, supermarkets, and convenient stores throughout South Africa. These local chains have successfully expanded into other countries in the Sub-Saharan Africa and the Asia-Pacific regions. Grocery retailers' value of sales was R406.2 billion in 2013 and is expected to grow by almost five percent per annum in the next five years.

These retailers are stocked with different brands of products appealing to all. The South African consumer is also expanding its knowledge on Western foods and food preparations and view U.S. products as high quality. There is also an expanding demand for healthy and ready-to-eat products. Stores are looking to provide the consumer with a simplified shopping experience that saves time. Internet sales are also on the increase.

Retail Company	Ownership	2013 Sales (USD/Year in Mil)	No. of Outlets	Locations (city/region)	Purchasing Agent Type	Website
Shoprite	Local	\$9,058	2,177	Sub-Saharan Africa	Agent/Direct	<a href="http://www.shopriteholdings.co.za">www.shopriteholdings.co.za</a>
Pick 'n Pay	Local	\$6,109	1,076	Sub-Saharan Africa	Direct	<a href="http://www.picknpay-ir.co.za">www.picknpay-ir.co.za</a>
Massmart	Local/U.S.	\$6,882	376	Sub-Saharan Africa	Direct	<a href="http://www.massmart.co.za">www.massmart.co.za</a>
The Spar	Local/Dutch	\$4,552	873	Sub-Saharan Africa	Agent	<a href="http://www.spar-international.com">www.spar-international.com</a>
Woolworths	Local	\$920	940	Sub-Saharan Africa/Asia-Pacific	Direct	<a href="http://www.woolworthsholdings.co.za">www.woolworthsholdings.co.za</a>

## Company Profiles

**Shoprite Holdings LTD:** Shoprite Holdings LTD is the largest food retailer in South Africa operating around 2,177 outlets including 278 outlets in 15 countries across Africa. The company reported turnover of R 102,204 billion for the year ended June 2014. The group comprises of a diversified portfolio that includes: Shoprite supermarkets, Checkers supermarkets, Checkers hyper, Usave stores, Ok Furniture outlets, Power express stores, House & Home stores, Hungry Lion fast food outlets, MediRite pharmacies and LiquorShops. The OK Franchise Division of the group targets lower income consumers.

The Shoprite Group's portfolio of stores allows them to cater to all income groups. The Checkers and House & Home brands focus on higher income customers, the Shoprite and OK Furniture brands target middle-low income customers, and the Shoprite Usave brand services the lower end of the market.

**Pick ‘n Pay:** Pick ‘n Pay has a strong presence in South Africa, Namibia, Botswana, Zambia, Mozambique, Mauritius, Swaziland and Lesotho. Additionally Pick n Pay owns a 49 percent share of a Zimbabwean supermarket business, TM Supermarkets. The company’s offer to customers focuses on groceries, clothing and general merchandise, but also includes additional value-added services to cater for the customers’ expectations and evolving needs. To ensure a convenient and accessible shopping experience the group operates across multiple store formats, both franchised and owned. For the past five years the group’s core focus has been to strengthen its strong South African retail businesses under the Pick n Pay and Boxer brands, while adopting a systematic approach to expanding into adjacent areas, including geographical growth through the African continent.

As a major retailer in Africa, the group strives to address socio-economic challenges through the supply of high-quality, affordable food for all customers. The group’s extensive portfolio doesn’t focus on a specific demographic group, but focuses on being a retailer for all types of South Africans.

**Massmart:** Massmart is the second-largest distributor of consumer goods in Africa, the leading retailer of general merchandise, liquor and home improvement equipment and supplies, and the leading wholesaler of basic goods. The Group comprises of nine wholesale and retail chains, and one buying group- 376 stores and 431 buying group members all focused on high-volume and low-cost distribution. Massmart operates in 12 countries in the sub-Saharan Africa region through the 4 operating divisions- Massdiscounters, Masswarehouse, Massbuild and Masscash. In 2011, Walmart merged with Massmart by acquiring the majority of its stakes.

**The Spar:** The Spar Group Limited (Spar) is primarily a wholesaler and distributor of goods and services to independent retailers who trade under the Spar brand as: Superspar, Spar, Kiwispar, SaveMor supermarkets, Build it building materials outlets, Tops and Spar liquor stores, and Pharmacy at Spar pharmacy and healthcare outlets. Seven distribution centers provide goods and services to retail stores in South Africa, Swaziland, Botswana, Lesotho, Mozambique, Zimbabwe and Namibia. In addition, Spar wholesales goods to independent Spar stores in Zambia and Malawi, although these stores do not fall under a license agreement controlled by Spar South Africa. Distribution centers handle 60 percent of Spar’s turnover, with the remaining 40 percent of value delivered directly by suppliers to stores under a drop-shipment arrangement with Spar. The group’s focus is on supporting voluntary trading.

**Woolworths:** Woolworths Holdings Limited is an investment holding company that focuses on the provision of retail and financial services to upper and middle income groups, mainly, in South Africa but also in Africa, Australia and New Zealand. It operates through its two subsidiaries: Woolworths Limited and Country Road Limited. Woolworths Limited is a chain with over 900 retail stores, including franchise stores that offer a selected range of quality clothing, food, home improvement products, beauty, and financial services under its own brand name in South Africa, Africa and the Middle East. Country Road Limited is based in Australia and offers apparel and home improvement products in its own retail stores and through concession in Australian department stores.

Woolworths focuses on offering customers high quality food. The company is constantly assessing its food ranges and developing new ones, using delicious, simple, healthy ingredients. Themes include traditional, authentic, handmade or homemade and steam cuisine. They emphasize on selling nutritious and tasty food with a wide array of choices and have a particular emphasis on organic food. The company strives to keep people as well informed as possible about the food they are eating and how it

impacts on health. Every part of Woolworth's food production process is constantly monitored in order to make sure that there is as little impact on the surrounding environment and society as possible.

### **Convenient Stores**

Convenience is a trend in South Africa's fast moving consumer goods market and continues to be a key growth factor of the South African retail market. A growing working middle class is one of the major factors making this trend rise. Around 600 convenience outlets are open throughout the country and the major retailers and wholesalers own most of them. Woolworths Holdings remains the leader in convenience stores with Woolworths Food outlets and Woolworths outlets co-located at Engen Forecourts Quickshops, a national gasoline chain. Pick n' Pay Express has also partnered with major gasoline chain British Petroleum (BP). Sentra Value stores are owned by Shoprite Holdings and Sasol Forecourts joint ventures focus more in restaurant chains. It is common for convenient stores owned by the same major retailers to be located at key airports and shopping centers.

Convenience stores operate on extended hours or in some instances are open 24 hours. South Africans shop at convenience outlets because it is time saving and easily accessible. The focus of convenient stores is on pre-packed fresh produce and meals, fresh meat, baked goods, and home replacement hot meals.

### **Traditional Markets- "Mom and Pop" Small Independent Grocery Stores and Wet Markets**

South Africa's townships and rural areas continue to be seen as key growth areas for retail. This has promoted the expansion and development of malls in townships to target on the aspirations of emerging consumers. Although the expansion of malls to townships has been seen as a threat to local micro-enterprises, the spaza shop remains a strong competitor within South Africa's retail market. The spaza shop is a small informal convenience store that traditionally stocked small household items such as bread, maize meal, cooking oil, sugar and cigarettes, family-owned/run, and ran from one of the rooms in a house or an outbuilding in the yard. Today, with an estimated annual revenue of R7 billion (USD \$660 million), South Africa's spaza shops continue to be a significant retail channel, especially in townships and informal settlements. Small grocers such as cafes, street vendors and kiosks also comprise an important part of the independent retail market.

Independent small grocers presented a value growth of 11 percent in 2013. The government organization Small Enterprise Development Agency (SEDA) aided small businesses with funding and advice enabling the increase in number of outlets of traditional small grocers.

### **Section III: Competition**

U.S. suppliers mostly face competition from exporters members of the European Union (EU) because of the established Free Trade Agreement (FTA) between South Africa and the EU.

Product Category	Major Supply Sources (2013)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Meat and			



Product Category	Major Supply Sources (2013)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
<b>Edible Meat</b>  <b>Net imports: 458,261 Tons</b>  <b>\$525 Million</b>	1.Brazil-41%  2.Netherlands-14%  3.United Kingdom-9%  USA Minor Supplier-2.5%	Brazil is one of the largest exporters of poultry in the world. The beef and pork industry are highly developed with halal/kosher procedures.  The Netherlands enjoys the benefits of the Free Trade Agreement.  The U.K. has strong ties with South Africa and a well-developed meat market.	Local companies are protected by the tariffs on meat imports and the chicken anti-dumping laws to the U.S., and most recently to the Netherlands and U.K. For details on South African regulations on the meat industry review the following reports: <a href="#">U.S. Beef, Pork, and Poultry Exports to South Africa Remain Blocked</a> and <a href="#">South Africa Poultry Update</a> .
<b>Fish and Seafood</b>  <b>Net imports: 126,007 Tons</b>  <b>\$343 Million</b>	1.Thailand-56%  2.China-11%  3.India-7%  USA Minor Supplier-2.2%	Thailand has become one of the most important players in the global seafood trade. Dominating the market of fresh, chilled and frozen seafood with shrimp as the biggest export product.  China is price competitive and the world's largest source of seafood handling over 35% of global production.  India supplies frozen shrimp (vannamei) and fish.	Local fisheries are strong producers of certain fish species making South Africa a net exporter.
<b>Dairy Products</b>  <b>Net imports: 52,593 Tons</b>  <b>\$186 Million</b>	1.New Zealand-17%  2.France-17%	New Zealand is a member of MFN status countries.  France, as a member of EU, benefits from the EU-SA Free Trade Agreement of 1999.	The South African dairy market is strong on production of liquid products with the major liquid products being UHT and pasteurized milk. The major processed products are hard and semi-hard cheese.

Product Category	Major Supply Sources (2013)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
	3.United States-15%		
<b>Frozen Vegetables</b>  <b>Net imports: 47,699 Tons</b>  <b>\$55 Million</b>	1.China-28%  2.Belgium-23%  3.Netherlands-15%  USA Minor Supplier-3%	China is a leading exporter of frozen and dried vegetable mixtures, frozen spinach and peas.  Exploits the benefits from non-tariff trade with South Africa.  The Netherlands accounts for the majority of the frozen potato products in South Africa.	Consumers prefer locally produced fresh vegetables which are more affordable and sustainable.
<b>Fruits</b>  <b>Net imports: 104,756 Tons</b>  <b>\$51 Million</b>	1.Mozambique-83%  2.Spain-5%  3.Israel-2%  USA Minor Supplier-0.11%	Mozambique is price competitive. It enjoys the benefit of its membership of the Southern African Development Community (SADC) with a free trade agreement.  Spain is the leading European producer of subtropical fruits.  Israel's main export crops are citrus fruits.	South Africa is a net exporter of most fruits with local companies dominating the citrus and subtropical fruit market. For more information on fruit import and exports refer to the following reports: <a href="#">South African Citrus Fruits</a> and <a href="#">South African Deciduous Fruits</a> .
<b>Nuts</b>  <b>Net Imports: 13,412 Tons</b>  <b>\$48 Million</b>	1.United States-17%  2.Phillipines-16%  3.Vietnam-15%	The USA is a major producer and exporter of almonds, pistachios and walnuts.  The Philippines supplies pili nuts, cashews, peanuts and coconuts.  Vietnam dominates the cashew nut market.	Major products from local companies are pecans and macadamia nuts. Other nuts are mostly imported.

Product Category	Major Supply Sources (2013)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
<b>Rice</b>  <b>Net imports:</b> <b>1,264,876 Tons</b>  <b>\$651 Million</b>	1.Thailand-35%  2.India-32%  3.Vietnam-2%  USA Minor Supplier-0.15%	India is the second largest producer of rice, basmati and non-basmati.  Thailand is among the top global rice producers.  Vietnam is a leading producer and exporter of rice.	South Africa does not produce rice because of the high water requirement of the crop. For more details on rice consumption and trade review the following report: <a href="#">Grain and Feed Annual</a> .
<b>Vegetable Oil</b>  <b>Net imports:</b> <b>653,461 Tons</b>  <b>\$641 Million</b>	1.Indonesia-47%  2.Malaysia-23%  3.Argentina-9%  USA Minor Supplier-0.14%	Indonesia is a world leader in palm oil production.  Malaysia is a key exporter of palm oil.  Argentina dominates the sunflower oil market and follows Spain, as the second largest exporter of soybean oil into South Africa.	There is an expansion in soybean processing facilities in the country. Most other vegetable oils and oil products are imported. For more details on oilseed production, consumption and trade refer to the following report: <a href="#">South African Oilseeds-Supply and Demand</a> .
<b>Sugars and Sugar Confectionary</b>  <b>Net imports:</b> <b>451,795 Tons</b>  <b>\$230 Million</b>	1.Brazil-82%  2.Swaziland-14%  3.Thailand-3%  USA Minor Supplier-0.04%	Brazil is a leader in sugar cane production and has a competitive price.  Swaziland produces only cane sugar.  Thailand is the second largest producer of sugar in the world.	Due to variable weather conditions and socio-economic factors, the South African sugar industry is under pressure. For more information on the sugar industry please refer to the following report: <a href="#">South African Sugar Industry</a> .
<b>Beverages</b>  <b>Net imports:</b> <b>81,789,928 Liters</b>  <b>\$413 Million</b>	1.United Kingdom-42%  2.Italy-35%  3.United States-5%	The UK dominates the whiskey brands in the market.  Italian liqueurs, liquors and aperitifs are reputable in the market.  US spirits, especially whiskey, are strong in the market.	Wine consumption in South Africa has increased by more than 2% per annum in the past five years. For more details on South African wine production, consumption and trade review the following report: <a href="#">South African Wine Industry</a> .

Source: Global Trade Atlas.

## Section IV: Best Product Prospects

### Products Present in the Market That Have Good Sales Potential

Product Category	2013 Market Size	2013 U.S. Imports	5 Year Ave. Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Almonds	\$14,058,030	\$12,220,495	18.37%	-	None.	The U.S. has the largest market share accounting for more than 87% of imported almonds available in South Africa.
Poultry	\$404,800,920	\$13,248,258	53.65%	Varied. All non-EU member tariffs are of 24% on poultry in pieces and 82% in whole birds.	Imports of bone-in chicken are blocked by the anti-dumping duty. Brazil has the largest market share in the imported poultry industry in South Africa.	The U.S. has the largest share of turkey imports into South Africa.
Snack Foods	\$168,805,793	\$4,764,596	17.90%	Varied.	Competition from local producers, China and the United Kingdom.	U.S. snack foods are perceived as high quality.
Dairy Products	\$185,914,681	\$24,772,707	2.05%	Varied.	France is the top exporter of dairy products into South Africa.	The U.S. is the third biggest exporter of the dairy in the South African market.
Sauces and Condiments	\$16,904,532	\$3,880,088	6.94%	5% except for sauces and condiments of flour, meal or malt extract which incur 20%.	Local processors and producers are becoming more competitive by boosting quality and providing for competitive prices.	The U.S. is the leading exporter of sauces and condiments into the country.

Product Category	2013 Market Size	2013 U.S. Imports	5 Year Ave. Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Salmon	\$23,656,309	\$2,407,656	-9.25%	25%	Norway dominates the market.	There is a demand for processed, canned salmon.
Vegetable Oil	\$812,203,237	\$3,255,274	-84.32%	10% except for coconut oil which has no tariff rate.	Significant expansion in the local soybean processing facilities.	Rising demand on various vegetable oils.
Whiskey (Bourbon)	\$283,881,290	\$13,664,268	-68.03	154c/li.	The United Kingdom is by far the largest exporter of whiskey to South Africa accounting for almost 83% of the imported whiskey available in the country.	The U.S. is the third largest exporter of whiskey to South Africa.
Casings	\$66,736,103	\$9,241,923	3.92%	-	China dominates the market with a market share of 61%.	The U.S. follows China with a market share of almost 14%.

Source: Global Trade Atlas.

## Products Not Present in the Market in Significant Quantities but That Have Good Sales Potential

Product Category	2013 Market Size	2013 U.S. Imports	5 Year Ave. Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Soybean Meal	\$328,611,649	\$16,285	92.70%	-	Argentina dominates the market.	The U.S. is the third largest exporter of soybean meal into South Africa.
Olive Oil	\$16,750,357	\$16,976	-25.48%	10%	Aggressive competition from Italy, Spain and Greece.	Growing attention to the olive oil market.
Baby Food	\$19,851,181	\$6,032	-43.30%	20% except for disaccharide free infants' food which is exempt from a duty.	Nestlé South Africa leads the market with 45% value share in 2013.	Families transitioning to the middle class where U.S. products are viewed as high quality.
Milk Alternatives	\$10,184,199	\$691,861	123.50%	21%	Weak local competition.	Rising awareness of health foods and benefits of non-dairy milks and products.

Source: Global Trade Atlas.

## Products Not Present in the Market Because They Face Significant Barriers

United States poultry exports to South Africa are restricted by anti-dumping duty in tariff number 0207 14 90 (bone in cuts, include the chicken leg quarters) instituted in 2000, has caused imports from the U.S. to drop significantly. New increased duties on top of the anti-dumping which came into effect September 30, 2013 is 37% from 17%.

The United States is waiting on the South African government to recognize the country's World Organization for Animal Health (OIE) negligible risk status for bovine spongiform encephalopathy (BSE, commonly known as mad cow disease) and have a signed health certificate that permits trade. The recognition would allow the U.S. to import export livers, offal, Hilton cuts, and pet foods that include beef protein.

South African restrictions on pork due to the Porcine Respiratory and Reproductive Syndrome (PRRS) and other diseases have caused disagreement between the U.S. and the nation and have blocked market access.

The office of Agricultural Affairs of the USDA/Foreign Agricultural Service in Pretoria, South Africa prepares timely reports on Trade Policy Monitoring. For more details on the status of U.S. beef, pork, and poultry exports to South Africa please refer to the following report:

[Trade Policy Monitoring: U.S. Beef, Pork, and Poultry Exports to South Africa Remain Blocked](#)

Canned products in South Africa have to meet very strict minimum requirements of the Compulsory Specification. The process of being authorized to import canned meats, fish, and other products is lengthy making the market almost impenetrable.

## **Section V: Post Contact and Further Information**

If you have any questions or comments regarding this report or need further assistance, please contact the Foreign Agricultural Service (FAS) office in Pretoria at the following address:

Office of Agricultural Affairs  
U.S. Embassy Pretoria, South Africa  
Washington, D.C., 20521-9300  
Tel: +27 (012) 431-4235  
Fax: +27 (12) 342-2264  
Email: [agpretoria@fas.usda.gov](mailto:agpretoria@fas.usda.gov)

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:** The Euromonitor International, the National Statistics of South Africa, Global Trade Atlas, the retail industry publications and their websites, and trade industry interviews.