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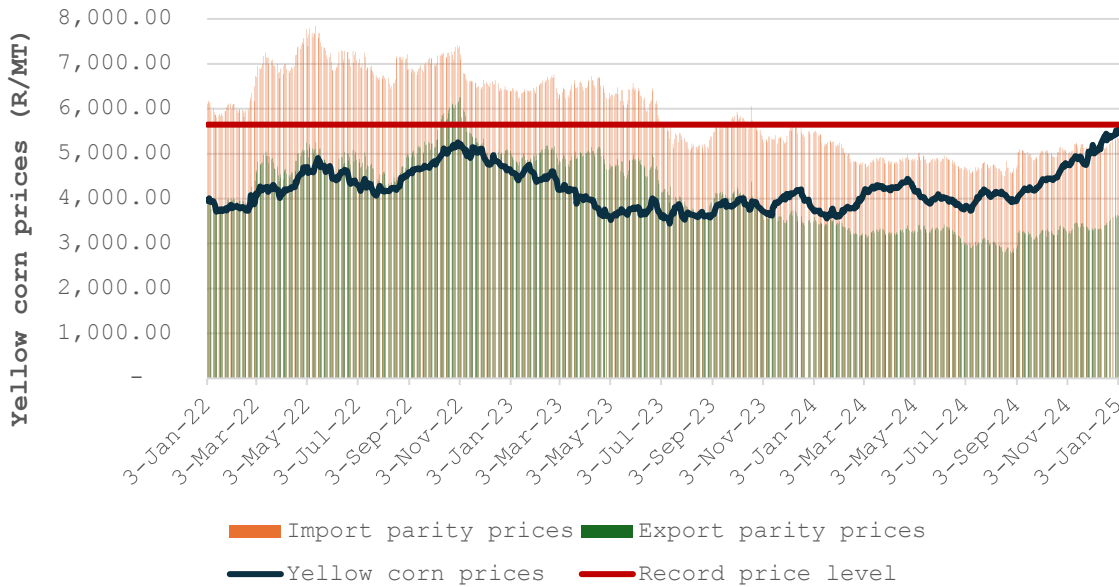
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Report Highlights:

South Africa's dairy industry is likely to grow in the future due to improving economic factors, despite suffering from many weather and disease related challenges in the past five years. This growth may provide opportunities for dairy genetics exporters. In 2025, FAS/Pretoria forecasts unprocessed liquid milk production to increase by two percent on declining feed costs and forecasts U.S. dairy exports to South Africa (including lactose, whey, and cheese) to increase by ten percent on increased consumer spending power. This report provides an overview of the South African dairy industry and forecasts production, processing, imports and exports in the 2025 marketing year.

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Executive Summary

The South African commercial dairy herd is estimated at 1.27 million head, predominantly Holstein and Jersey. Farmers prefer to use artificial insemination for genetic improvement, and the United States has market access for semen and embryos. However, most U.S. genetics exports go to the beef industry.

Due to price pressure and unfavorable feed and climatic trends the past decade, per cow productivity has fallen and the dairy industry has undergone significant consolidation: the number of dairy farmers in the country has declined by 60 percent. Corn prices reached record highs in the past year but are expected to fall again once the new harvest season begins in May. A foot and mouth disease (FMD) outbreak also affected dairy cattle in 2024. However, with improving conditions, milk production is forecast to increase in 2025.

Dairy processing trends shift with consumer disposable income and inflation, conditions that are starting to improve in South Africa. Demand is also expected to increase for processed products for export to China following a new trade protocol. Long life and sterilized milk, cheese, and fermented products are the top processed dairy products. Powdered milk, cream cheese, sweetened/flavored/colored milk, and whey powder demand are expected to increase by four percent in 2025.

Domestic consumption of dairy products varies by income group. Between July 2023 and July 2024, retail sales of ultra-high temperature (UHT) milk, cream cheese, and butter increased more than other dairy products, suggesting increasing consumption among both lower and higher income groups. With higher production, imports of UHT milk are forecast to fall precipitously. Most imports from the EU are luxury cheeses, butter, and cream. The United States exports lactose, milk albumin, whey, malt extract, buttermilk and cheese to South Africa, which are forecast to increase by ten percent in 2025. South Africa exports mainly within the Southern African region but is expected to increase exports to China by ten percent due to the new dairy protocol.

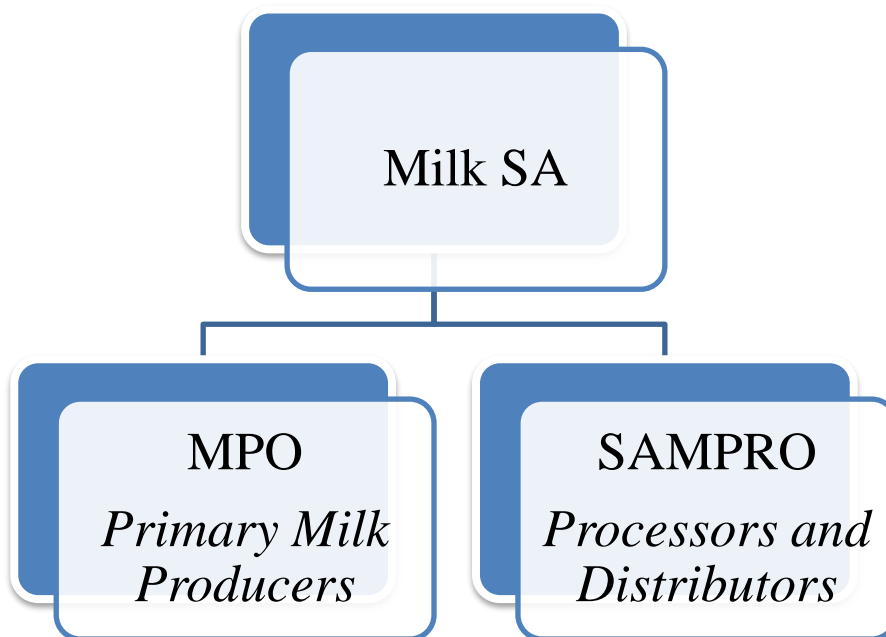
Industry Organization and Structure

The South African dairy industry is the fourth largest agriculture sector in South Africa, with a gross value of production of approximately R25 billion (US\$1.3 billion) in 2023. The country accounts for 0.4% of global milk production, with over 984 milk producers employing 60,000 farm workers and providing an additional 40,000 people with indirect jobs within the dairy value chain.

The dairy industry is represented by Milk South Africa (Milk SA), a nonprofit organization and a member of the International Dairy Federation. Milk SA was established in 2002 to represent the common interests of all the primary dairy producers and processors in South Africa. These include the Milk Producers Organization (MPO), which represents the primary milk producers, and the South African Milk Processors Organization (SAMPRO), which incorporates the secondary industry members consisting of processors and distributors. A statutory levy administered by Milk SA is imposed on each liter of milk and per kilogram on other dairy products that are purchased for processing, sold to retailers, or imported into South Africa. This levy is used primarily for consumer education, transformation projects to empower emerging farmers, and broader skills and knowledge development. In addition to Milk SA, the industry has a Dairy Standards Agency that monitors dairy products for compliance with legal and food safety standards.

Figure 1

Structure of the South African milk industry



Source: Post with MPO data

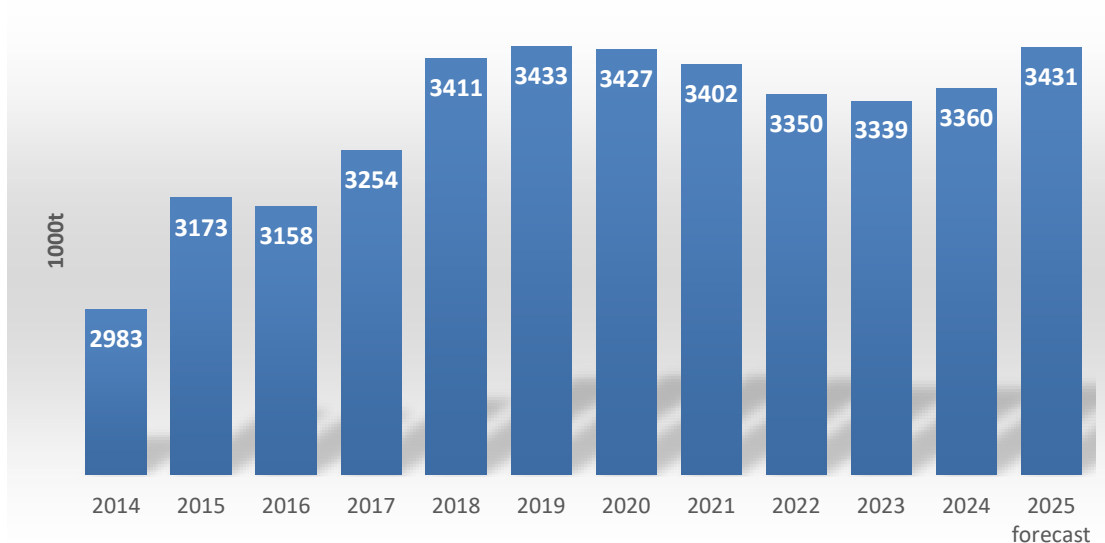
Milk Production

FAS/Pretoria forecasts that unprocessed liquid milk production will increase by two percent in 2025 on declining feed costs and expectations of increasing demand driven by new trade opportunities with China. South Africa is currently experiencing high feed costs that were exacerbated by the 2024 El Nino drought. Feed costs are expected to improve in the second quarter of 2025 when maize harvest begins. Unprocessed milk production for 2024 is estimated to increase by one percent as a result of weak consumer purchasing power affecting demand and an impact in supply caused by the foot and mouth disease outbreak that affected one of the biggest dairy producing regions in the country.

South Africa's average milk production per cow per day stood at 16.1 liters (4.3 gallons) in 2023, a decrease from 21.0 liters (5.5 gallons) in 2018 due to heat stress, escalating production costs, and exit of farmers out of the industry. FAS/Pretoria met with industry contacts who shared that cross bred Holstein-Jersey cows can currently produce 18-20 liters (4.8-5.3 gallons) a day while some Holstein dairies in Northern South Africa that are under a total mixed ratio feeding can produce 40-45 liters (10.6-11.9 gallons) a day.

Figure 2

South African Unprocessed Milk Production



Source: Post with South African Milk Producers Organization data

Table 1

South Africa's Dairy Structure

Province	Total milk producers in 2018	Total milk producers in 2024	% change in producers between 2018 and 2024	% of National distribution of milk	Average herd size per producer in 2024
Eastern Cape	212	164	-22.6	29.5	1285
Western Cape	419	299	-28.6	28.3	581
KwaZulu Natal	221	182	-17.6	28.3	931
Mpumalanga	69	35	-49.3	4.5	620
Gauteng	84	46	-45.2	4.4	765
Free State	206	91	-55.8	3.2	741
Northwest	135	57	-57.8	1.4	167
Limpopo	12	5	-58.3	0.4	709
Northern Cape	7	3	-57.1	0.0	95
Total	1,365	882	-42.7		797 (weighted average)

Source: Post with MPO data

Milk Producers

The number of dairy farmers in the country has declined by 60 percent in the past decade. According to FAS/Pretoria contacts, producers have been under pressure from low prices received from processors and competition with imports of ultra-high temperature (UHT) milk. Because small herds lacked the economy of scale necessary to remain profitable, many small operations have sold to larger-scale producers.

Most milk producers are concentrated in the coastal areas of South Africa. These areas are more suitable for milk production due to their mild temperatures and good rainfall that ensure quality natural and cultivated pastures. The volume of milk varies slightly by season. August to November season is a high milk production season because of the availability of pasture in the spring period, while January to April Season is a low season.

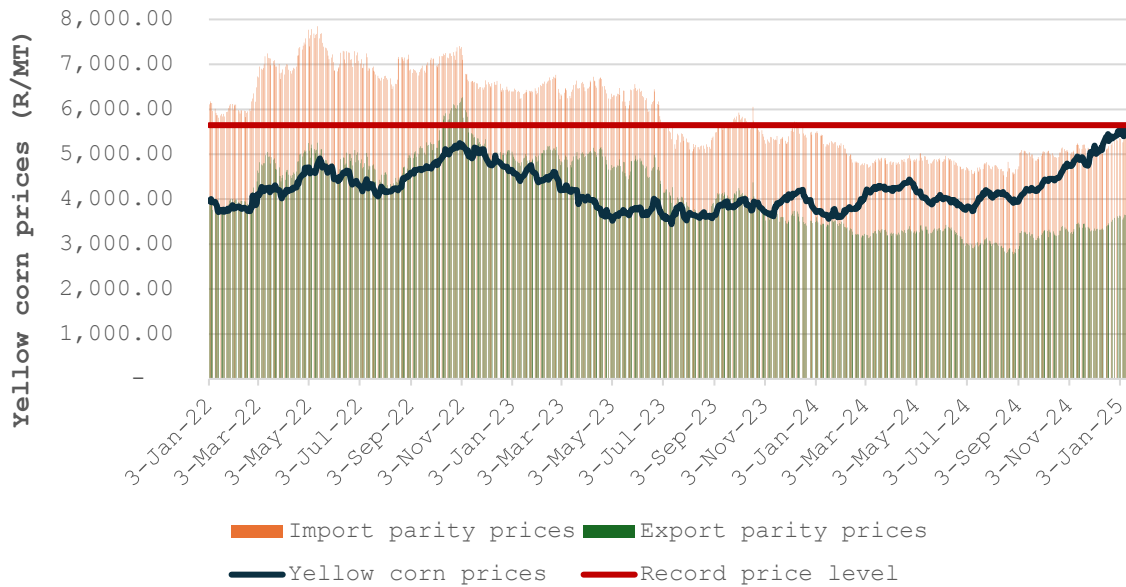
Production in the inland areas is intensive and costly because of needed concentrated production systems, though a few dairy farmers, primarily in the Western Cape, employ a total mixed ration (TMR) system as well. A TMR system is a method of feeding dairy cows that mixes a variety of ingredients into a single feed. The ingredients can include roughage, concentrates, protein supplements, minerals, vitamins and feed additives.

While supplemental feeding is more prevalent and a higher cost factor in inland areas, rising feed costs have put dairy producers under pressure across all production areas. South Africa's local corn prices are at record levels following a 22 percent drop in production in Marketing Year 2023/24 and increased import demand in the region. In addition, the recent devaluation of South Africa's currency against the U.S. dollar coupled with a rise in international corn prices supported the record price levels (See: [South Africa Grain and Feed Update](#)).

Yellow corn prices reached a historical high level on January 13, 2025, of R5,647/MT (\$295/MT), a year-on-year surge of 55 percent. These prices are expected to continue trading at elevated levels until the start of the harvesting season in May.

Figure 3

The Trend in the Local Price for Yellow Corn since January 2022



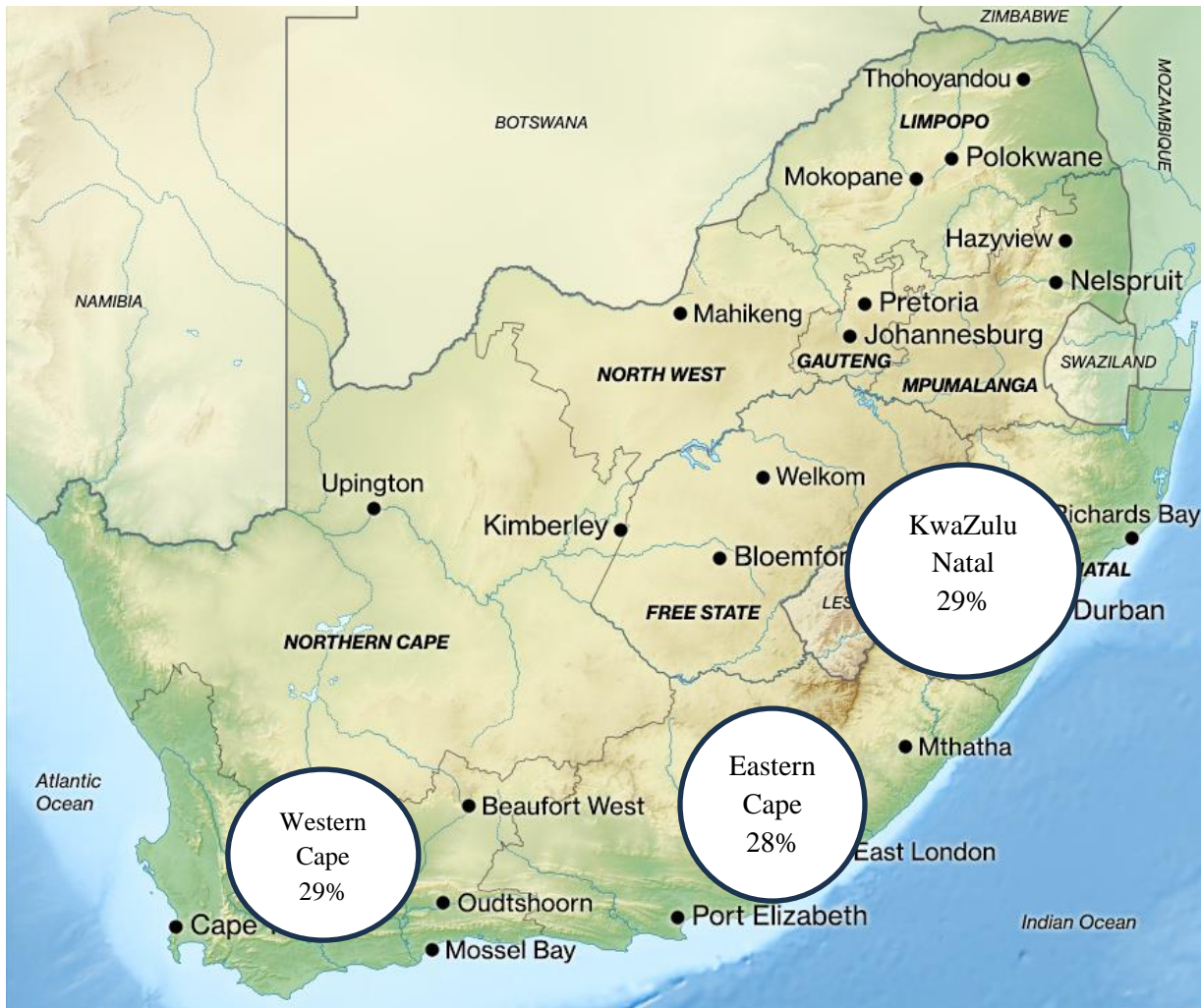
Source: FAS/Pretoria using data from GrainSA

Most major milk producing areas were not affected by the El Nino drought in the 2023-24 season. Grazing was affected in the Free State, Mpumalanga, and Limpopo provinces, as well as some isolated areas in the Eastern Cape province. The Agriculture Business Chamber reported that grazing is expected to recover from the 2023-24 drought damage caused by El Nino. Various regions in South Africa started

receiving rains in October 2024 with above average rain starting in December until January 2025. Precipitation levels in recent months indicate a recovery from the 2023-24 El Nino induced drought.

Figure 4

South Africa's Milk Production Areas (percentage of South African production)



Source: Post with DALRRD data

Foot and Mouth Disease

South Africa is currently experiencing a foot and mouth disease (FMD) outbreak in the KwaZulu Natal (KZN), Free State, and Eastern Cape provinces. The dairy industry was most affected by the FMD outbreak reported in May 2024 in the Eastern Cape province. The Eastern Cape province accounts for 29 percent of the national dairy herd while Free State and KZN hold 4 percent and 29 percent of the dairy herd, respectively. Thirty-four farms in the Eastern Cape were vaccinated after they were confirmed positive for FMD, thirty-six farms were vaccinated to mitigate the severity of clinical signs in case of infection and 430 cattle were culled. No new cases have been reported and no positive results have been received since September 19, 2024. There are currently 37 positive farms (6 beef farms and 31 dairy farms) and 39 negative-vaccinated farms. Approximately 634,000 cattle were vaccinated to control FMD between 2021 and 2022 while 96,905 cattle were vaccinated in the Eastern Cape in 2024.

Herd Composition and Genetics

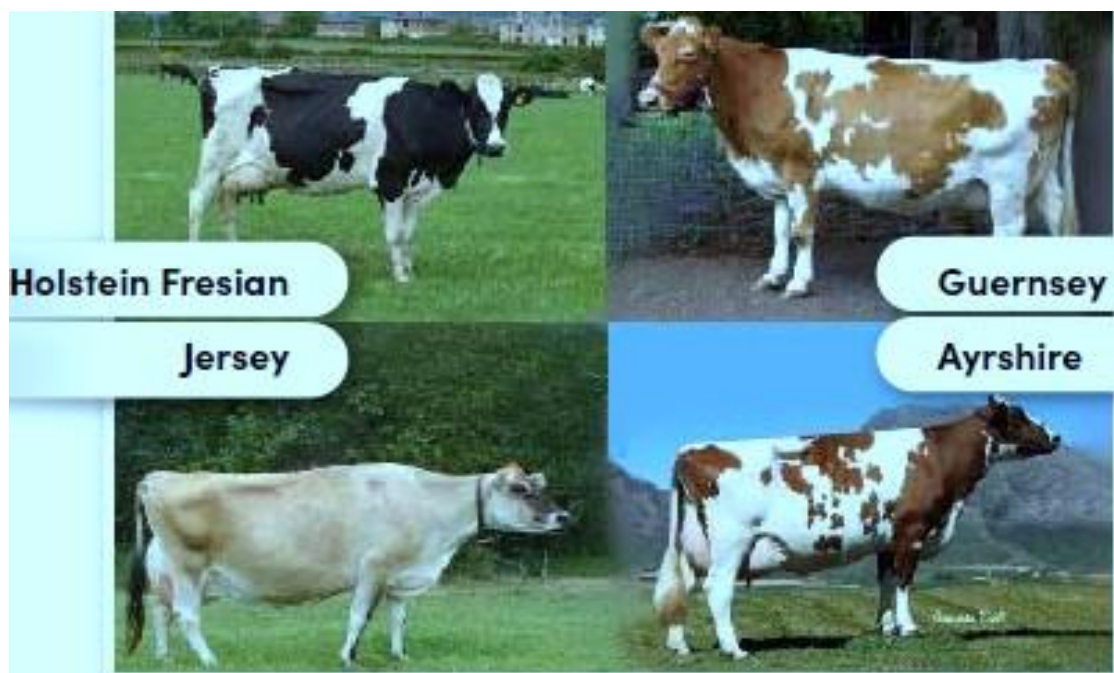
According to Milk SA, the total commercial dairy herd is estimated at 1.27 million head. Holsteins and Jerseys are the predominant pure-bred animals, with producers increasingly applying crossbreeding to account for market and environmental demands. Guernsey and Ayrshire breeds are less prevalent in

South Africa. Farmers are moving to Jerseys because Jersey cows have high milk solids which are rich in butterfat and protein. However, South African processors generally don't pay premiums for solids found in Jersey milk.

FAS/Pretoria met with representatives from the dairy industry in the Gauteng and Western Cape provinces and learned that some dairies are practicing "beef on dairy" using primarily Angus breeds. In some areas, particularly the Western Cape, as much as eighty percent of the breeding is done through mating angus bulls to dairy cows while 20 percent is by artificial insemination using sexed semen. However, many dairies complain that feedlots and backgrounding operations don't pay the needed premiums for beef/dairy crosses compared to straight dairy steers.

South Africa primarily uses bovine semen for genetic improvement. The semen is mostly imported and sold by various semen companies in the country. The United States currently has access for both bovine semen and embryos. However, FAS/Pretoria contacts shared that use of embryos is limited because of underuse of genomic testing and availability of abundant sexed semen. South Africa imports bovine semen genetics from the U.S., Canada, New Zealand, Denmark, Australia, and the Netherlands. In 2024, the U.S. had a 43 percent market share of South Africa's bovine semen imports. However, most of these imports were beef rather than dairy genetics.

Figure 5
South Africa's Prominent Dairy Breeds



Source: FAS/Pretoria with Milk SA photo

Dairy Processing

The demand for unprocessed milk is expected to increase by five percent in 2025 based on improved retail sales quantities emanating from improved disposable income and economic recovery. Post

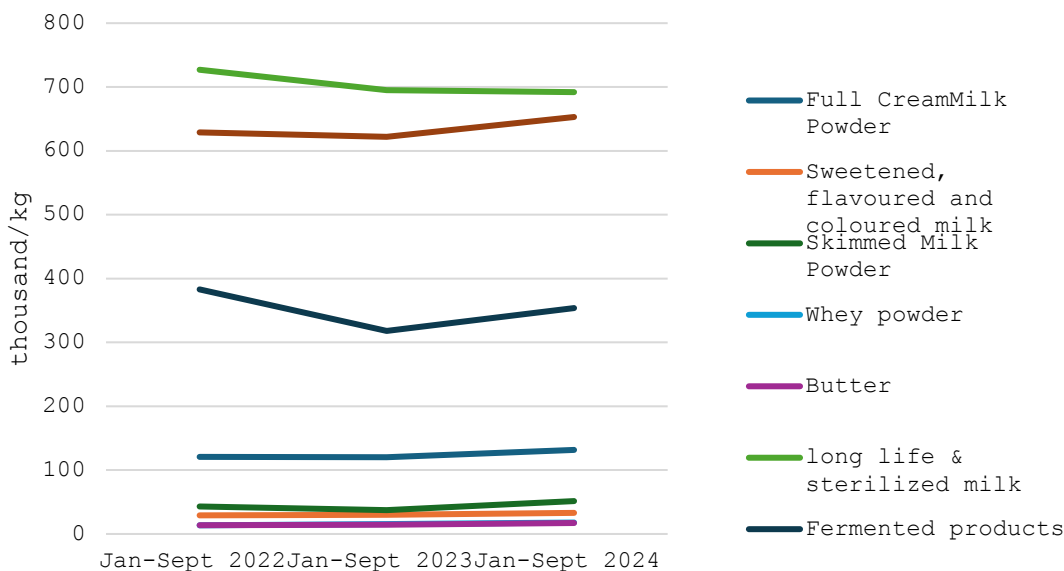
estimates that consumption for unprocessed milk in 2024 slightly increased by one percent as a result of strong supplies due to a fall in fuel costs and a decrease in inflation of basic food products influencing demand. South Africa’s food inflation has been on a downward trend after it reached a 14 year high of 14.4 percent in 2023 (see: [Food Inflation Surged to a 14-Year High in South Africa](#)). The decrease in inflation will free disposable income for consumers and enable them to purchase more expensive food products.

FAS/Pretoria forecasts that dairy processing to produce milk powder, cream cheese, sweetened flavored or colored milk and whey powder will increase by four percent in 2025. This is because of new markets created by the dairy protocol that South Africa signed with China, an increase in disposable income in an improving economy with lower inflation, and greater exposure to dishes and cuisines from different cultures in the working age population. Between January and September 2024, unprocessed milk utilized for processing of sweetened flavored or colored milk increased by nine percent compared to the same period in 2023, while utilization of unprocessed milk for manufacturing of powder milk increased by 48 percent.

Figure six below shows the quantities of unprocessed milk used in the manufacturing of various dairy products. Long life milk and sterilized milk production has been decreasing the past three years, while cheese production is fluctuating. Long life and sterilized milk production utilizes 28 percent of the total unprocessed milk, cheese utilizes 27 percent of unprocessed milk followed by fermented products with 15 percent. Fermented products include maas and yoghurts.

Figure 6

Unprocessed Milk utilization in manufacturing (Jan to Sep 2022- Jan to Sep 2024)



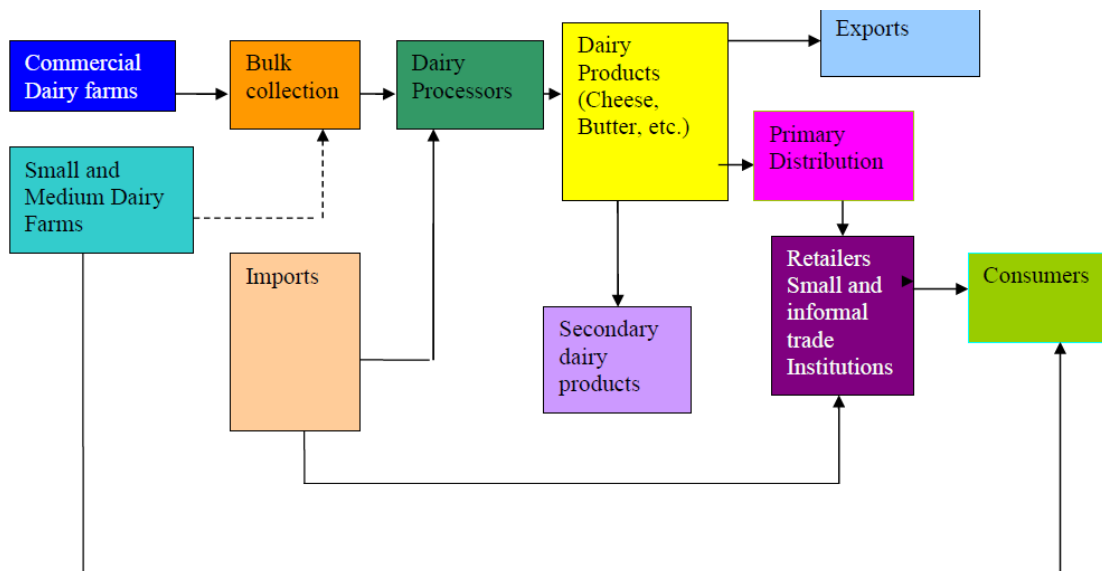
Source: FAS Pretoria using Milk SA data

Whey powder processing increased by 16 percent from January to September 2024 as compared to the same period in 2023. Between January and September 2023, unprocessed milk utilized for the

manufacturing of whey powder increased by 14 percent. Unprocessed milk utilized in the production of butter between January and September 2024 increased by 18 percent.

The number of milk processors declined by ten percent between 2017 and 2023, with larger processors becoming more dominant in the market. Most commercial farmers have supplier contracts with processors while some large processors have their own farms producing milk which increases integration of the industry. Reports by the milk industry indicate that ten processors represent seventy percent of the dairy processing sector. Clover, Lactalis, Woodlands Dairy, Danone, Dewfresh, Lancewood, Orange Grove Dairy, Nestle SA, Dairy Group SA and Fair Cape are the top dairy processors in South Africa. In addition to the large processors, there are several producer-distributors who predominantly sell unprocessed milk produced at their own dairies directly to consumers and retailers.

Figure 7
South African dairy marketing channels



Source: FAS/Pretoria with DALRRD photo

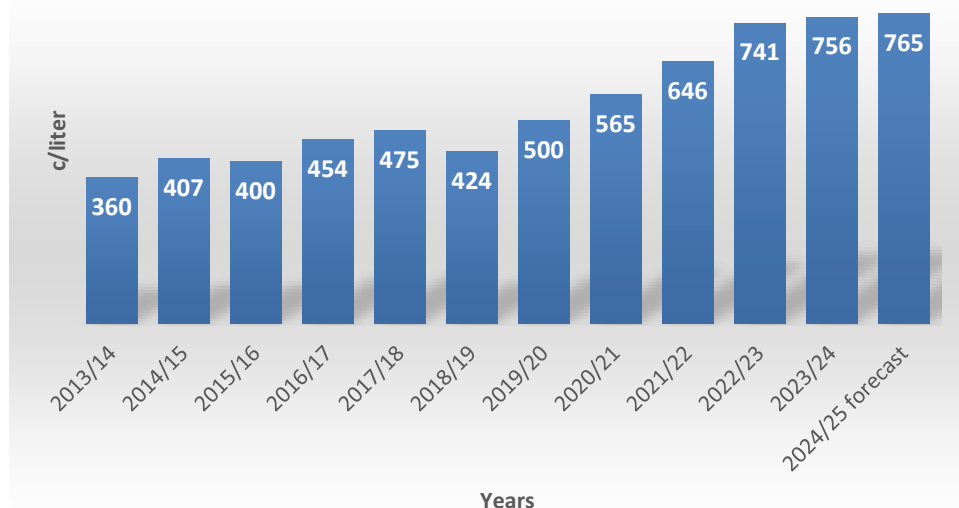
Unprocessed Milk Prices

Post expects the price of unprocessed milk to stabilize in 2025 with a one percent increase based on an increase in market demand stimulated by consumers' improved purchasing power. Post estimates that the unprocessed milk price will increase by two percent in 2024 because of supply shortages caused by a foot and mouth disease outbreak in the Eastern Cape region.

During the 2017/2018 market year the price of milk increased slightly because of the 2016 drought, which led to an increase in feed costs and herd reduction via heifer and cow slaughter. During covid 19, the price of milk increased again as a result of greater consumer demand during lockdowns. This led to the price of milk trending higher in the following years.

Figure 8

South Africa Unprocessed Milk Prices from 2013 to 2025 (March/February MY)



Source: FAS/Pretoria with DALRRD data

Dairy Consumption

The South African dairy products market is divided into approximately 60 percent liquid products and 40 percent concentrated products. Pasteurized liquid milk and UHT processed milk are the major liquid products, with hard cheese being the main concentrated product.

According to Bureau for Food and Agriculture Policy (BFAP), South Africa has three main lifestyle segments which include the low-income segment, middle-income segment and affluent segment. The low-income segment is the least affluent and makes up 40 percent of households, middle-income households constitute 40 percent while the affluent households constitute 20 percent of households. Low-income and middle-income households consume processed cheese, yoghurts that are sometimes called dairy snacks, and UHT milk, while affluent consumers purchase luxury cheeses, condensed milk and healthy yoghurts.

Milk SA reported that retail sales of UHT milk, cream cheese and butter increased more than other dairy products between July 2023 and July 2024. UHT milk sales increased by 1.6 percent, cream cheese increased by 7.1 percent, and butter sales by one percent. Cream cheese and butter are consumed by customers who fall under the affluent segment.

Dairy Products

Liquid Milk

Production

FAS/Pretoria forecasts that fresh milk and ultra-high temperature (UHT) processed milk production will decrease by two percent in 2025 as a result of producer investment in other dairy products that are bringing better returns. Post estimates that liquid milk production will decrease by one percent. During the past three years, unprocessed milk utilized for producing UHT milk has decreased by three percent.

Consumption

FAS/Pretoria forecasts that liquid milk consumption will increase by three percent as a result of consumers continuing to demand UHT milk. UHT milk is preferred in South Africa because it has long shelf life, and it is more affordable. The South African liquid milk market consists of fresh milk, long life milk, sweetened or flavored milk, and ultra pasteurized milk. Liquid milk is primarily consumed in drinks, used in cereals, and mixed with pap (a staple food made from white maize/corn). Liquid milk that is sold to consumers is packaged in bottles and cartons of different sizes. The current price of 1 liter (0.26 gallon) of fresh milk is US\$1.42 while a liter of UHT milk is US\$1.08.

Exports

South Africa primarily exports UHT milk to Southern African regional buyers, but these exports represent only two percent of South African fresh milk produced. Post forecasts that UHT liquid milk exports for 2025 will increase to 90,000 tons as they recover from restrained exports the past five years. UHT milk exports for 2024 are estimated to have increased by two percent because of slow regional production.

Wholesalers and retailers buy milk from farmers and process it into UHT milk. UHT milk is exported into the South African Development Community (SADC) region by retailers. South Africa exported an average of 87,696 tons/year of UHT liquid milk to the SACU region the past five years. Between January to November 2024, 82,742 tons of liquid milk were exported, which is a six percent increase from the same period in 2023. Botswana is the leading importer of liquid milk exported from South Africa with a percentage share of 35 percent in 2024.

Imports

FAS/Pretoria forecasts that liquid milk imports for 2025 will decrease by 50 percent as a result of local retailers producing their own milk. During the past years, farmers reported that imports of cheaper UHT milk flooded the local market. FAS/Pretoria estimates that liquid milk imports will decrease by 100 percent in 2024.

Milk Powder

Production

FAS/Pretoria forecasts that milk powder production will increase by ten percent in 2025. Post estimates that milk powder production increased by 20 percent in 2024 because of increase in demand for infant milk. South Africa's milk powder products include skimmed milk powder and full cream milk powder. These products are the leading products in the utilization of unprocessed milk for their processing. South Africa further imports whey powder and milk albumin that are used in the production of milk powder. Between January to September 2024, 131,647,498 kilograms of unprocessed milk was used to manufacture full cream milk powder while 51,497,106 kilograms of unprocessed milk was utilized to manufacture skimmed milk powder.

Consumption

FAS/Pretoria forecasts that milk powder consumption will increase by 15 percent in 2025 because of increased demand for infant formula and relief from inflation pressures. Infant formula consumption is very high in South Africa. The country is reportedly leading the Sub-Saharan region in terms of infant formula consumption. The high consumption is partially the result of women/mothers joining the labor force early and being forced to leave their babies at home. The leading baby formula companies in South Africa include Nestlé, Tiger Brands, Group Lactalis, Abbott Laboratories, Ausnutria, Parmalat, Norvalac and Similac. Post estimates that milk powder consumption will increase by five percent 20 percent in 2024.

Imports

FAS/Pretoria forecasts that imports of milk powder ingredients will increase by ten percent as a result of an increase in demand for milk powder in the country, stemming from infant consumption demand. South Africa imports whey proteins and milk albumin as ingredients in the manufacture of infant formula. Top countries that export infant formula to South Africa include Switzerland, Germany, Netherlands, France and Philippines. South Africa's imports of infant formula from January 2024 to November 2024 increased by 62 percent as compared to the same period in 2023.

Exports

FAS/Pretoria forecasts that milk powder exports will increase by 20 percent in 2025 as a result of an increase in demand for milk powder in the Sub-Saharan Africa region. South Africa exports milk powder to Lesotho, Namibia, Botswana and Zambia. Between January to November 2024, South Africa exported 3,935 tons of milk powder valued at US \$3 million which was an increase of 19 percent from the same period in 2023.

Cheese

Production

Cheese producers are mostly located in the coastal areas because of the large supply of milk and the availability of resources such as water. FAS/Pretoria forecasts that South Africa's cheese production will increase by five percent in 2025 as a result of an increase in demand from exports and an increase in consumer purchasing power. Post estimates that cheese production in 2024 was 94,000 tons.

Consumption

FAS/Pretoria forecasts that South Africa's consumption of cheese will increase slightly by one percent in 2025. Cheese consumption for 2024 was estimated to be flat as consumers' purchasing power was still under pressure.

South Africa's total per capita consumption of cheese was 1.6kg/year in 2023. South Africa has the second highest per capita consumption of cheese in Africa, after Egypt, with a per capita consumption of 5.5kg/year. The African continent is reported to have a per capita consumption of 0.6 kg/year, while Morocco, Nigeria, and Kenya have per capita consumptions of 1.0, 1.1 and 1.3 kg/year, respectively.

Processed cheese consumption in South Africa is relatively high because of affordability, convenience, fast-food industry demand and long shelf life. This is a result of the rising demand for ready to eat and easy to prepare foods.

Exports

FAS/Pretoria forecasts that South Africa's exports of cheese will increase by 15 percent in 2025 as demand for cheese in the neighboring markets increases and new markets are opened. South African cheese exports for 2024 are estimated to have increased by 50 percent; recovering from a significant drop in 2023.

South African exports cheddar cheese, processed cheese and blue veined cheese to the South African Development Community Countries (SADC). Botswana is the leading destination for South Africa's exports of cheese to the world followed by Namibia and Mozambique.

Imports

FAS/Pretoria forecasts that South Africa's cheese imports will decrease by 10 percent in 2025. South Africa's imports of cheese from the world include cheese products that are considered a luxury and expensive. As the South Africa currency (the Rand) continues to depreciate against other international currencies, consumers are forced to replace the luxury cheese products with cheaper options. The top five countries that exported cheese to South Africa in 2024 include New Zealand, Germany, France, Spain and Austria. The primary cheese products imported include blue veined cheese, unripen cheese, whey cheese and grated or powdered cheese.

Dairy Product Trade

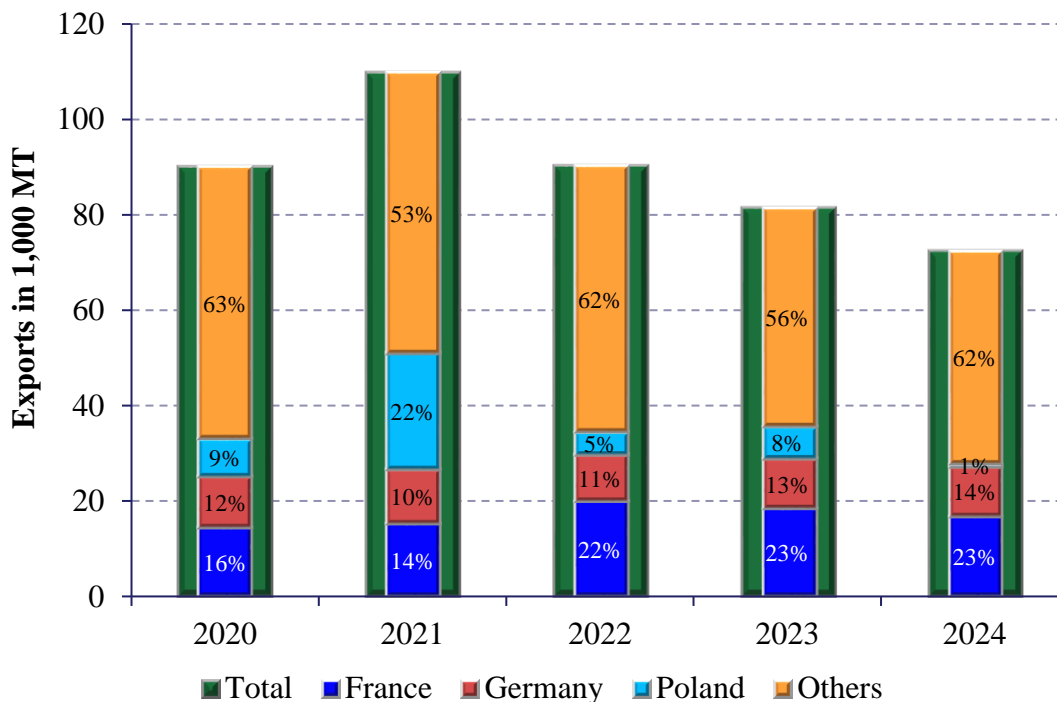
Imports

FAS/Pretoria expects dairy imports for 2025 to decrease by five percent as the EU is currently experiencing low milk production pulling down available supplies of butter and cheese. The majority of EU exports to South Africa are luxury cheeses, butter and cream. The top five dairy products imported from the world included milk and cream, casein, malt extract, whey, lactose and cheese.

South Africa's dairy imports are primarily from EU countries. The top seven countries that export dairy products to South Africa are members of the European Union followed by the United States. The EU dominance in the market is in part, due to the Southern African Development Community European Union Economic Partnership Agreement (SADC-EU EPA), which includes a tariff rate quota for imports of dairy products from the EU. Meanwhile, other trading partners are charged import tariffs on dairy products imported into South Africa. France was the leading exporter in 2024 with a market share of 27 percent followed by Germany with a market share of 11 percent. South Africa imported an average of 88,767 tons of dairy products, valued at US\$252 million over the past five years. Imports have been increasing moderately in the past five years but dropped by 17 percent in 2024.

Figure 9

South Africa Dairy Products Imports from the World (2020-2024)



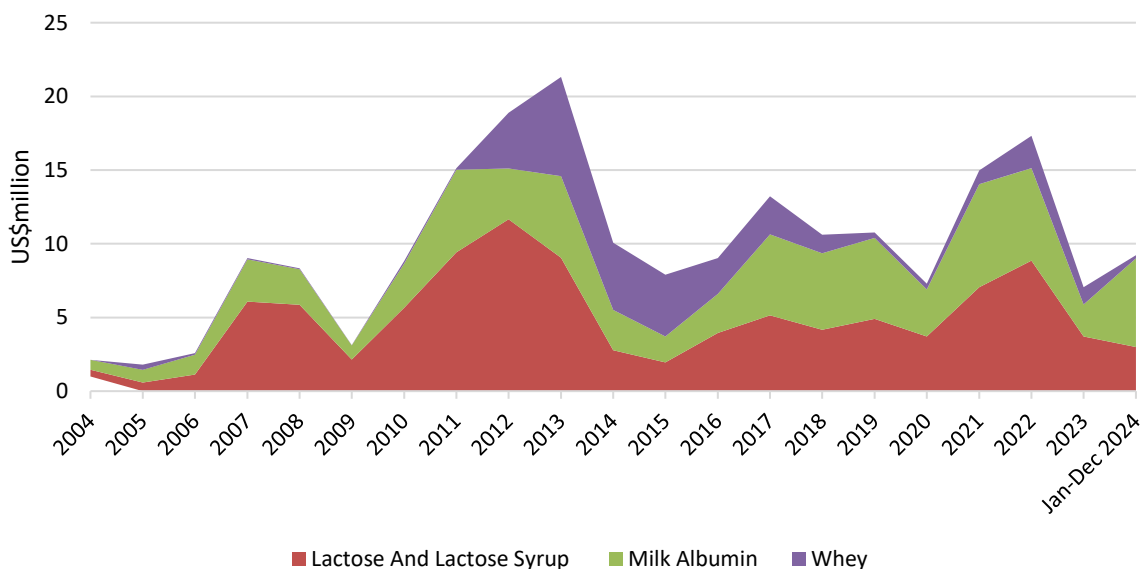
Source: FAS/Pretoria with SARS data

United States Dairy Exports to South Africa

FAS/Pretoria forecasts that U.S. dairy exports to South Africa will increase by ten percent in 2025 based on improved consumer purchasing power and increased demand for infant milk manufacturing. The United States exports lactose, milk albumin, whey, malt extract, buttermilk and cheese to South Africa. Over the past five years, the United States exported on average 6,792 tons of dairy products at a value of US\$13 million to South Africa. Lactose and lactose syrup, milk albumin and whey are the leading U.S. dairy products exported to South Africa. Milk albumin made up 58 percent of exports, while Lactose and lactose syrup and whey comprised of 30 percent and 2 percent respectively. In 2023, South Africa imported 4.283 tons of dairy products worth \$7.7 million dollars which was a 50 percent decrease from 2022 imports. The fall in imports from the United States was the result of a significant decrease in lactose and lactose syrup imports and technical barriers to trade. Between January and December 2024, U.S. exports of dairy increased by 25 percent in value as compared to the same period in 2023.

Figure 10

U.S. Dairy products exports to South Africa



Source:

FAS/Pretoria with Trade Data Monitor LLC (TDM) data

Exports

South Africa exports mainly to the Southern African Development Community region. The top products that are exported include food preparations for infant use, ice cream, malt extract, cheese, milk and cream, yogurt and buttermilk. In 2024, Botswana imported 98 percent of the total dairy products exports from South Africa. In 2023, South Africa exported 814,337 tons of dairy exports valued at \$ 411 million dollars to the world. The top dairy exports include cheese, milk and cream, yogurt, malt extract and ice cream. FAS/Pretoria forecasts that South Africa's dairy exports will increase by ten percent in 2025 due, in part, to the dairy protocol that South Africa signed with China to open market access for South Africa's dairy products into China.

Table 3*South Africa Dairy Exports to the World in tons*

Partner	2020	2021	2022	Jan-December 2023*	Jan-December 2024*	%Jan-Dec 2023 & Jan-Dec 2024
Botswana	87,294	766,812	1,284,016	653,317	7,446,863	1,040.00
Mozambique	30,421	31,824	31,435	34,210	29,219	-15
Namibia	32,306	34,338	32,516	35,529	35,285	8
Eswatini	27,464	25,864	26,894	24,874	24,378	-2
Lesotho	18,125	17,053	17,632	18,128	18,538	2
Zambia	6,940	7,742	7,897	11,392	11,351	0
Others	31,049	36,115	39,389	39,887	40,449	1
Total	233,599	766,812	1,439,779	814,337	7,606,083	834

Source: FAS/Pretoria with TDM data

Tariff Policy

South Africa charges import tariffs for all dairy products except liquid milk.

Table 4

A maximum of the percentage duty is charged if the specific duty charged is more than the price of the product

South Africa dairy imports tariff schedule

HS Code	Product description	Statistical Unit	General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0402	Milk and cream, concentrated or containing added sugar or other sweetening matter: in powder, granules or other solid forms, not exceeding 1,5%	kg	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value	free	450c/kg with a maximum of 96% of the value	270c/kg with a maximum of 57,6% of the value
0403.2	yoghurt	kg	free	free	free	free	free	free
0403.90.10	flavored or containing fruits, nuts or cocoa	kg	450c/kg with a maximum of 96% of the value	free	free	free	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value
0403.90.20	Cultured milk, not concentrated or containing any sugar or other sweetening matter,	kg	450c/kg with a maximum of 96% of the value	free	450c/kg with a maximum of 96% of the value	free	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value
0403.90.30	other yoghurt	kg	450c/kg with a maximum of	free	450c/kg with a maxi	free	450c/kg with a maximum	270c/kg with a maximum of

			96% of the value		maximum of 96% of the value		of 96% of the value	57,6% of the value
0404.1	whey and modified whey, whether or not concentrated or containing added sugar or other sweetening matter	kg	450c/kg with a maximum of 96% of the value	free	450c/kg with a maximum of 96% of the value	free	450c/kg with a maximum of 96% of the value	270c/kg with a maximum of 57,6% of the value
0404.90.10	whey: dairy powder blends, containing at least 30% (m/m) milk protein calculated on a fat-free basis	kg	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value	free	450c/kg with a maximum of 96% of the value	270c/kg with a maximum of 57,6% of the value
0404.90.90	whey; other	kg	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value	450c/kg with a maximum of 96% of the value	free	450c/kg with a maximum of 96% of the value	270c/kg with a maximum of 57,6% of the value
040510.1	butter: in immediate packaging of a content of 20kg or more and other	kg	500c/kg with a maximum of 79% of the value	500c/kg with a maximum of 79% of the value	500c/kg with a maximum of 79% of the value	free	500c/kg with a maximum of 79% of the value	300c/kg with a maximum of 47,4% of the value
0405.20.10	dairy spreads with a milk content of 39% or	kg	500c/kg with a maximum of	500c/kg with a maximum of 37% of	500c/kg with a maximum	free	500c/kg with a maximum of 37% of the value	300c/kg with a maximum of

	more but less than 75%		37% of the value	the value	of 37% of the value			22,2% of the value
0405.20.90	dairy spreads; other	kg	500c/kg with a maximum of 79% of the value	500c/kg with a maximum of 79% of the value	500c/kg with a maximum of 79% of the value	free	500c/kg with a maximum of 79% of the value	300c/kg with a maximum of 47,4% of the value
04.06	cheese and curd	kg	500c/kg with a maximum of 95% of the value	500c/kg with a maximum of 95% of the value	500c/kg with a maximum of 95% of the value	free	500c/kg with a maximum of 95% of the value	300c/kg with a maximum of 57% of the value

Source: Post with SARS data

As part of the provisions in the Southern African Development Community European Union (EU Economic Partnership Agreement, EU countries are allowed to export the following products to South Africa under a Tariff Rate Quota. Below are the 2024 quota allocations.

Table 5*South Africa-EU EPA dairy imports TRQ*

HS Code	Product Description	Quota allocation in tons
04051010	Butter in immediate packaging of a content of 20kg or more	350
04059000	dairy spreads: other	
04061000	fresh (unripened or uncured) cheese, including whey cheese and curd	6020
04062000	Grated or powdered cheese, of all kinds	
04063000	Processed cheese, not grated or powdered	
04064000	Blue-veined cheese and other cheese containing veins produced by <i>Penicillium Roqueforti</i>	
04069012	Other cheese: cheddar	
04069022	Gouda; Other	
04069099	Other; Cheese	
19019040	Other, in immediate packaging of a content of 5kg or more	1,610
210500	Ice cream	105

Source: Post with SARS data

As part of the Southern African Customs Union, Mozambique and United Kingdom (UK) Economic Partnership Agreement provision (SACUM-UK EPA), the UK exports dairy products to South Africa under a Tariff Rate Quota as detailed in Table 4. In 2024, the UK exported 2,881 tons of dairy products to South Africa at a value of US\$8.5 million. In January to December 2024, UK dairy exports to South Africa decreased by 42 percent as compared to the same period last year.

Table 6*SACUM-UK EPA Import TRQ allocations for 2024*

HS Code	Description	Quota allocation in tons
04051010	Butter in immediate packaging of a content 20 kg or more	65.8
040590	Dairy spreads; Other	
04061000	Fresh (unripened or uncured) cheese, including whey and whey cheese, and curd	1067.5
04062000	Grated or powdered cheese, of all kinds	
04063000	Processed cheese, not grated or powdered	
040640	Blue-veined cheese and other cheese containing veins produced by <i>Penicillium Roqueforti</i>	
04069012	Other Cheddar Cheese	
04069022	Other Gouda cheese	
04069099	other cheese	
19019040	Malt extract; Other, in immediate packaging of a content of 5kg or more	557.20
2105000	Ice cream	16.08

Source: Post with SARS data

Attachments:

No Attachments.