

**Voluntary Report** – Voluntary - Public Distribution

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**Report Highlights:**

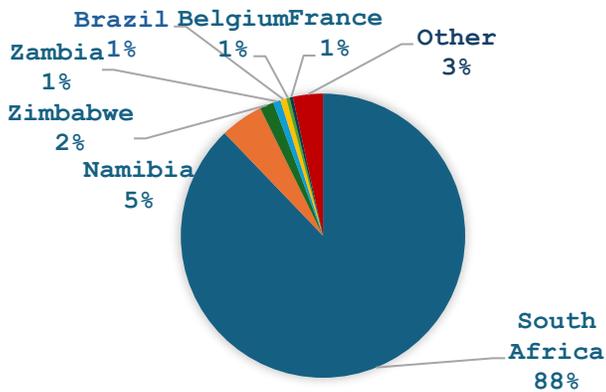
Botswana offers a variety of export prospects for U.S. food and agricultural products due to its 2.6 million population, which includes a sector of affluent consumers seeking high-quality imported goods. In 2025, Botswana imported more than \$614 million worth of food and agricultural products from more than 100 nations, making it a major importer. Consumers with middle-class and upper-class incomes are searching for high-quality imports, particularly in Gaborone's capital. Onions or shallots, live plant cuttings, tobacco waste, sugar beet seed, live mammals, bovine meat, carrots, and mushrooms are the consumer-oriented product categories that FA/Pretoria has determined have the most potential for U.S. exports.

# Market Fact Sheet: Botswana

## Executive Summary

Botswana (population: 2.6 million) has transformed from one of the world's poorest countries into a stable, upper-middle income economy with investment grade status. The country's 2025 GDP reached \$19 billion. Botswana imports most of its agricultural products from South Africa and eSwatini.

## Imports of Consumer-Oriented Products



Source: [Trade Data Monitor, LLC.](#)

## Food Retail Industry

Botswana's food retail sector faced a challenging environment in 2025, marked by food inflation of approximately 5.5 percent (November 2025), compressed margins for major retailers, such as Sefalaana, and increased digital adoption. Convenience food sales grew, though consumer spending remained constrained by elevated inflation despite projected GDP growth of 3-4 percent.

## Food Processing Industry

Botswana's food processing sector is characterized by high import dependence (\$614 million in 2025) and limited domestic production capacity. Cereals, beverages, dairy, and processed foods dominate imports. Low productivity constrains the sector, with domestic cereal production meeting only 39 percent of demand.

## Food Service Industry

The food service sector posted strong growth in 2025, supported by urbanization, rising incomes, and demand for convenience. Restaurant and delivery platform expansion continues, though the sector remains heavily reliant on imported food and beverage products.

## 2025 Quick Facts

**Imports of Consumer-Oriented Products:** \$614 million

### List of Top 10 Growth Products in Botswana

- |                        |                             |
|------------------------|-----------------------------|
| 1) Cane or Beet Sugar  | 6) Live Mammals             |
| 2) Onions and Shallots | 7) Fresh peppers & allspice |
| 3) Live plant cuttings | 8) Mushrooms                |
| 4) Tobacco refuse      | 9) Carrots                  |
| 5) Sugar beet seed     | 10) Bovine meat             |

### Botswana Food Industry by Channels

Food Industry Output	\$390 million
Food Exports	\$65 million
Food Imports	\$614 million

### Top 10 Botswana Food Retailers

- |                  |                        |
|------------------|------------------------|
| 1. Choppies      | 6. Fours Cash & Carry  |
| 2. Sefalana      | 7. Woolworths          |
| 3. Shoprite      | 8. Square Mart         |
| 4. Pick n Pay    | 9. Payless Supermarket |
| 5. Spar Botswana | 10. OK Supermarket     |

### GDP/Population

Population:	2.6 million people
GDP:	\$19 billion
GDP per capita:	\$7,380

*Sources: Trade Data Monitor, LLC., Botswana Unified Revenue Service, Euromonitor International, GATS, local trade contacts, local industry publications, international supermarket news and trade press*

Strengths	Weaknesses
<b>Modernized Trade Infrastructure:</b> Botswana has established Special Economic Zones (SEZs) with streamlined customs procedures. Botswana has implemented the National Single Window, an electronic platform that enhances import efficiency and security.	<b>Limited Market Size and Purchasing Power:</b> The country's small population and constrained consumer market reduce the cost-effectiveness of direct, specialized imports from the United States.
Opportunities	Challenges
<b>Agricultural Technology:</b> Market potential exists for livestock genetics and seed technology.	<b>Import Restrictions:</b> The Government of Botswana actively restricts imports of certain agricultural products, particularly meat and vegetables, to promote domestic production and food security objectives.

## Section 1: Market Overview

Botswana is strategically positioned in Southern Africa, bordered by South Africa, Namibia, Zimbabwe, and Zambia. As a member of the Southern African Customs Union (SACU), the country leverages regional market access despite its small domestic population of 2.6 million.

### Economic Environment

Botswana's economy contracted approximately one percent in 2025, driven by a sustained downturn in the global diamond market. This follows a three percent contraction in 2024, creating fiscal pressures, rising debt levels, and necessitating austerity measures. A modest recovery is projected for 2026. The diamond sector decline—caused by weak global demand and competition from lab-grown alternatives—continues to constrain government revenue and foreign exchange reserves, which historically comprise a significant share of GDP. President Duma Boko's administration is prioritizing economic diversification, job creation, and restructuring the diamond-dependent economy while addressing immediate fiscal challenges.

### Inflation and Cost of Living

Food inflation averaged 5-6 percent throughout 2025, significantly contributing to cost of living pressures, particularly for bread, cereals, and meat. Despite overall inflation averaging three percent, food prices remained elevated due to heavy import dependence, especially from South Africa. Sharp increases in South African white maize prices in early 2025 further pressured local retail costs.

### Agricultural Sector

Agriculture contributes 1.6-3.0 percent of GDP but remains a vital employment sector. Livestock production, particularly cattle, accounts for 80 percent of agricultural output. The sector faces persistent challenges from arid conditions, resulting in substantial food import dependence. Government initiatives including the Integrated Support Programme for Arable Agriculture Development (ISPAAD) and the National Master Plan for Arable Agriculture and Dairy Development (NAMPAADD) aim to modernize farming practices, expand horticulture, and strengthen food security.

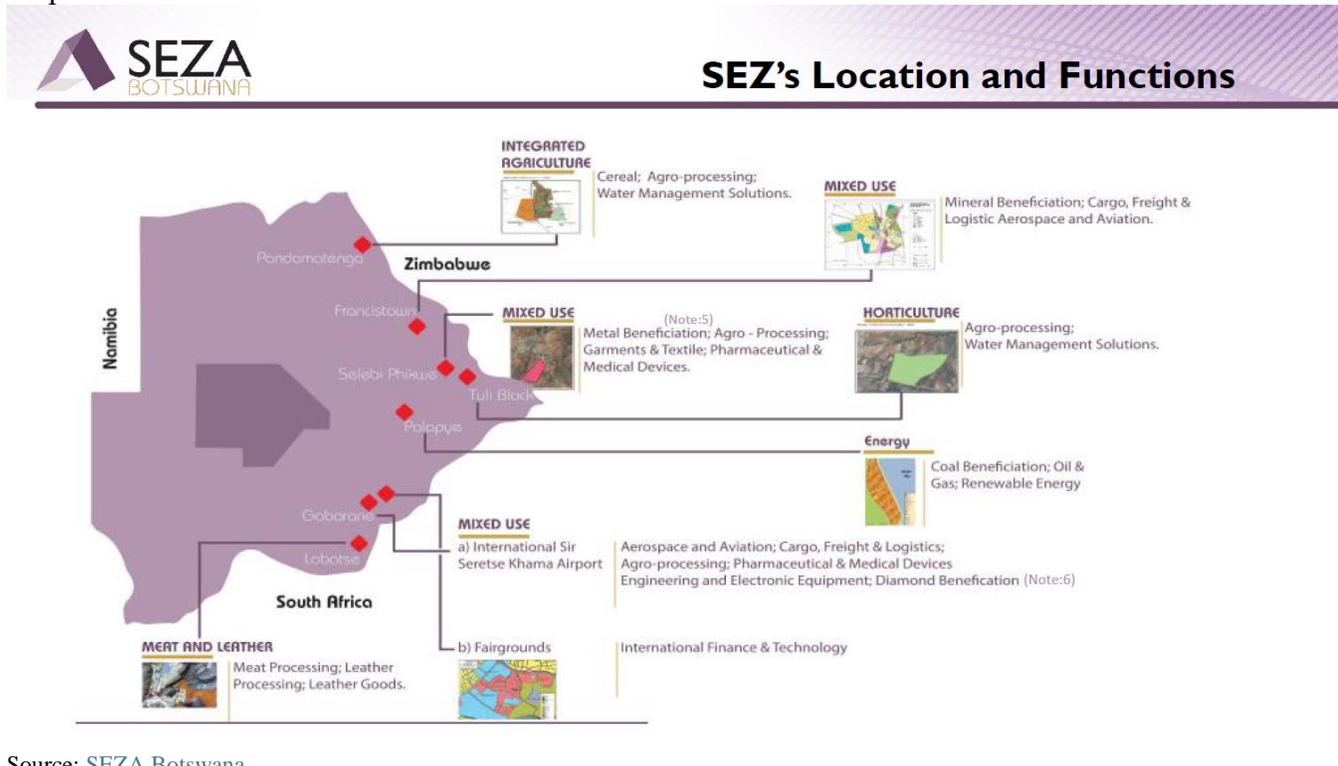
### Crop Production

Staple crop production focuses on drought-tolerant varieties including sorghum, maize, millet, and cowpeas. Horticulture is expanding, with key production areas including Pandamatenga (cabbage, onions, tomatoes) and Selebi Phikwe (citrus: lemons, oranges).

### Policy Direction

Under National Development Plan 12 (2025-2026), Botswana is attracting Foreign Direct Investment from Asian and European sources to modernize agriculture, improve yields, enhance drought resilience, and strengthen food security. The government is reassessing policy on genetically modified crop cultivation to boost productivity while continuing to import GM products, reflecting concerns about excessive import dependence on South Africa.

Map 1. Botswana SEZ's Location and Functions



Source: [SEZA Botswana](http://SEZA Botswana)

## Special Economic Zones (SEZ)

To promote economic diversification, expand exports, create employment, and attract foreign direct investment, Botswana has established nine Special Economic Zones (SEZs) administered by the Special Economic Zones Authority (SEZA). These designated areas offer competitive fiscal incentives including reduced corporate tax rates and streamlined regulatory procedures. Key agricultural zones include Pandamatenga (agribusiness focus) and Lobatse (meat processing and value addition).

### 1.1 Population and Key Demographic Trends

Botswana's population reached 2.6 million in 2025, representing a two percent increase (approximately 100,000 people) from 2024. The population remains young, with a median age of 24-25 years, despite slowing growth rates. Key challenges include accelerating urbanization and ongoing HIV/AIDS prevalence.

Botswana covers 581,730 square kilometers (224,607 square miles), ranking as the world's 48th largest country. Botswana is only slightly smaller than the state of Texas and has a terrain that is predominantly flat with gently sloping tablelands. The Kalahari Desert covers approximately 70 percent of the land area.

Population distribution is heavily concentrated in the southeast and eastern regions, where climate conditions are more favorable and soils more productive, contrasting with the arid Kalahari that

dominates the interior. Over half the population resides in urban centers and rapidly expanding villages. Major population centers include Gaborone (capital), Francistown, Molepolole, Selebi-Phikwe, and Maun.

Botswana has transformed from one of the world's poorest nations to an upper-middle-income country over the past 50 years, driven by diamond wealth and stable governance. Despite expanding middle-class prosperity and improved living standards, the country faces significant income inequality, with unemployment at 18 percent overall and 37 percent among youth.

## **1.2 Economic Size, Purchasing Power, and Consumer Behavior**

Botswana's economy has averaged approximately five percent annual growth over the past decade, ranking among the world's fastest-growing economies. While smaller and more diamond-dependent than South Africa's diversified industrial economy, Botswana demonstrates greater per capita wealth and stability. Botswana's GDP per capita surpassed South Africa's around 2016.

### **Natural Resources**

Botswana ranks among the world's leading diamond producers and maintains substantial reserves of coal, copper, nickel, soda ash, gold, silver, and semi-precious stones. Unexploited deposits of uranium, lead, and zinc offer diversification potential. The government is actively pursuing economic diversification beyond diamonds through expanded mining operations and wildlife-based tourism. Mining remains the economic backbone, driving exports and GDP generation.

Livestock represents a critical natural resource. Cattle outnumber people and account for approximately 80 percent of agricultural output. Botswana produces more beef than domestic requirements, with surplus production primarily exported to the European Union. Foot-and-mouth disease poses the primary threat to the cattle sector. The Government of Botswana has invested in veterinary capacity to address livestock health challenges.

### **Economic Performance**

GDP per capita stabilized or declined slightly to \$7,400 in 2025 due to challenging conditions in the diamond sector. The economy experienced its fifth consecutive quarter of contraction, driven by diamond market weakness and declines in other key sectors: agriculture, forestry, and fishing (-3.4 percent), and water and electricity (-29 percent). Structural constraints, elevated youth unemployment, and diminished fiscal buffers further constrained economic performance.

### **Exchange Rate**

The Botswana Pula (BWP) averaged approximately 13.62 BWP per USD in 2025, ranging from 14.40 BWP/USD (April peak) to 13.12 BWP/USD (December). Monthly averages remained between 13.20 and 13.90 BWP/USD. Amid the sharp diamond market decline, Botswana accelerated Pula devaluation to 2.76 percent for 2025 (up from 1.51 percent in 2024) to enhance export competitiveness and preserve foreign exchange reserves. The weaker Pula supports non-mining sector expansion by improving price competitiveness for Botswanan exports including diamonds, livestock, and textiles in global markets.

## **Consumer Behavior**

Consumer behavior in 2025 reflects resilience amid economic headwinds. Over half of consumers reduced discretionary spending due to elevated inflation, employment uncertainty, and diamond sector challenges. Despite these pressures, consumers maintain an optimistic financial outlook, increasingly utilize digital platforms, and prioritize brand authenticity and value.

Consumers in Botswana demand greater transparency, equity, and quality service from brands. Financial vigilance has increased, with 37 percent of consumers now monitoring credit, reflecting heightened focus on fraud prevention and financial stability. Inflation impacts vary regionally: rural areas experienced approximately four percent price increases through September 2025, compared to 3.3 percent in urban centers.

### **1.3 Overall Business Climate**

Botswana's business environment in 2025 was characterized by economic contraction, with GDP declining approximately one percent due to the sustained global diamond market downturn. Despite mining sector challenges, the government prioritized fiscal consolidation, economic diversification, and digital transformation, with modest recovery projected for 2026.

### **Diamond Sector Dependence**

Diamonds dominate Botswana's economy, accounting for over 80 percent of export earnings and one-third of government revenue. Combined SACU customs revenue and diamond exports comprise two-thirds of government funding, creating significant vulnerability to external market fluctuations. The diamond sector is experiencing an unprecedented crisis, with declining global demand and prices generating liquidity constraints, fiscal deficits, and increased borrowing requirements.

### **Fiscal Position and Credit Rating**

Botswana maintains a strong credit profile with public debt capped at 40 percent of GDP, well below the SADC macroeconomic convergence target of 60 percent debt-to-GDP ratio. Moody's Investor Services and Standard & Poor's recently revised Botswana's outlook to negative, citing fiscal pressures and weakening diamond demand. Despite the negative outlook, Botswana retains investment-grade status with long-term ratings of A3 (Moody's) and BBB+/A-2 (S&P). The government is implementing reforms to reduce natural resource dependence and advance economic diversification, emphasizing digital innovation and improved ease of doing business.

### **Trade Infrastructure**

Botswana functions as a land-locked logistics hub in Southern Africa, with road and rail connectivity to major ports at Walvis Bay, Namibia and Durban, South Africa via the Trans-Kalahari Corridor and North-South Corridor. Key Special Economic Zones targeting agribusiness include Lobatse (beef and leather processing) and Pandamatenga (agricultural production).

Map 2. Railways of Southern Africa Map



Source: [Railways Africa](#)

### Agricultural Sector

Agriculture contributes approximately three percent of GDP but remains vital to rural livelihoods. The sector faces constraints from an arid climate, limited arable land, and unreliable water supplies. The country maintains a substantial livestock population. Government priorities include horticultural development, agricultural technology adoption, and enhanced food security to support economic diversification. Key drivers include EU beef exports, expanding horticulture (supported by import restrictions), and subsidized staple crop production (sorghum, maize, millet).

**Table 1: Botswana's Top 10 Agricultural Imports in 2025**

Dairy products	Processed vegetables
Bakery goods	Condiments & sauces
Non-alcoholic beverages	Fruit & vegetable juices
Beer	Fresh fruit
Wine	Soup & other food preparations

Source: [Trade Data Monitor, LLC.](#)

### 1.4 Recent Trends

Botswana's retail sector serves as a vital economic driver, contributing significantly to GDP and employment. The sector is dominated by South African chains and major domestic retailers such as Choppies. Despite heavy dependence on South African imports, the industry is undergoing rapid

transformation driven by accelerating digitalization, e-commerce adoption, and focus on high-volume fast-moving consumer goods (FMCG).

## **Retail Sector Evolution**

Urbanization and expanding middle-class purchasing power are reshaping Botswana's retail landscape through rapid digital adoption, growth of private label brands, and transition toward modern, organized retail formats. While traditional brick-and-mortar shopping remains dominant, retailers are increasingly leveraging e-commerce platforms and social media marketing to showcase competitively priced local product offerings. Formal supermarkets and shopping centers are expanding, displacing traditional informal and fragmented retail channels.

These evolving market dynamics and economic conditions present both opportunities and challenges for U.S. exporters seeking market entry or expansion in Botswana's retail sector.

## **Section II: Exporter Business Tips**

### **2.1 Market Research**

U.S. exporters should conduct comprehensive market research prior to entering the Botswana market. Research should encompass market size and trends, consumption patterns, import policies and procedures, and regulatory requirements.

Additional market research services are available through private sector firms including:

- [Fieldwork Africa](#)
- [AQR Fieldwork](#)
- [InVeritas Research](#)
- [Marketing Intelligence](#)
- [TGM Research](#)

For detailed information on import regulations, consult Section 3 of this report.

### **2.2 Local Business Customs and Market Entry**

As a founding member of the Southern African Customs Union (SACU), Botswana maintains duty-free trade with South Africa, Namibia, Eswatini, and Lesotho. Botswana's 2020 ratification of the COMESA-EAC-SADC Tripartite Free Trade Area expanded market access to COMESA member states, advancing trade integration across Eastern and Southern Africa.

## **Market Entry Strategy**

The most effective market entry approach for U.S. agricultural exporters is partnering with established import agencies or distributors experienced in Botswana's food and beverage sector. Such partnerships facilitate market entry and navigation of local regulatory and business environments.

FAS/Pretoria serves as a key resource for U.S. companies. U.S. exporters are strongly encouraged to conduct market visits to Botswana to network, establish business relationships, gain firsthand market intelligence, and identify commercial opportunities.

U.S. exporters should contact FAS/Pretoria for information on regional trade events. Engagement with State Regional Trade Groups (SRTGs), cooperator organizations, and industry associations provides additional resources and guidance for successfully navigating the Botswana market.

### 2.3 Consumer Tastes and Trends (2025)

Botswana consumer behavior in 2025 reflected a combination of financial caution and resilience, shaped by economic pressures, shifting priorities, and expanding social media influence.

#### Key Market Indicators:

- **Retail Food Sales:** \$390 million in 2025
- **Consumer Sentiment:** Financial caution, resilience, and cautious optimism characterize consumer behavior as households manage reduced disposable income amid diamond sector weakness
- **Reduced Discretionary Spending:** 53 percent of consumers reduced discretionary spending in Q2 2025 due to economic concerns; 57 percent planned further reductions
- **Value-Seeking Behavior:** Consumers prioritize essential purchases and actively seek competitive pricing to manage household budgets
- **Digital Adoption:** Accelerating utilization of digital banking and e-commerce platforms continues
- **Local Brand Preference:** Growing consumer attraction to brands demonstrating local values and authentic narratives, particularly artisanal and family-owned businesses
- **Food Inflation Impact:** Rising food prices drive consumers toward competitively priced, locally sourced products
- **Health Consciousness:** While not a dominant 2025 trend, consumers continue seeking nutritional value, particularly in high-inflation environments

#### Product Category Trends:

- **Beverages:** Non-alcoholic beverages, ciders, and malt-based beer represent the fastest-growing import categories in early 2025
- **Processed Products:** Sugar, confectionery, and processed fruits and vegetables drive import growth as consumer staples

### Section III: Imported Food Standards, Regulations and Procedures

U.S. exporters must comply with Botswana's food import regulations and standards. The import process requires obtaining necessary permits, meeting regulatory requirements, and undergoing inspections. Key regulatory agencies include [The Ministry of Agricultural Development and Food Security](#), the [Botswana](#)

[Bureau of Standards](#) (BOBS), the [Botswana Unified Revenue Service](#) (BURS), and the [Ministry of Health & Wellness](#).

### 3.1 Customs Clearance in Botswana

Products must be declared to the Botswana Unified Revenue Service (BURS) with required documentation including packing lists, commercial invoices, and permits, primarily processed through the Single Window System. Duties and Value Added Tax (VAT) are calculated on Cost, Insurance, and Freight (CIF) value. Engaging a licensed customs clearing agent ensures compliance with import and export regulations.

Certain products are restricted or require specific licenses; exporters should verify requirements in advance. Duties are calculated at CIF value; zero-value invoices are not accepted. Some agricultural and manufactured products face restrictions or require special licenses to protect domestic industries. Products originating from SACU member states may qualify for duty exemptions under trade agreements.

For detailed customs clearance procedures, visit the [Botswana Unified Revenue Services](#) website. Additional tariff information is available through the [International Trade Administration](#).

### 3.2 Documents Generally Required by Botswana Authorities for Imported Food

Food imports must comply with Ministry of Agricultural Development and Food Security and BURS (Customs & Excise) regulations. Required documentation includes:

- **Import Permit:** Required for most food products, particularly from non-SACU countries. Agricultural product permits are issued by the Ministry of Agricultural Development and Food Security.
- **Commercial Invoice & Packing List:** Detailing product descriptions, quantities, and values for customs duty calculation.
- **Certificate of Conformity (CoC):** Issued by recognized bodies such as Intertek for products covered by Botswana Standards (Compulsory Standards) Regulations.
- **Certificate of Origin:** Documenting product origin.
- **Health/Veterinary Certificates:** Required for meat, dairy, and animal products to ensure food safety compliance.
- **Import Declaration (Bill of Entry):** Legal document declaring product type, value, and quantity for customs clearance.
- **Bill of Lading (BOL) or Airway Bill (AWB):** Shipping documents serving as contract of carriage and a shipment receipt. BOL may also serve as title document.
- **Certificate of Incorporation and Valid Trading License**
- **Additional Certificates:** Depending on product type, additional permits or certifications may be required, including phytosanitary or health certificates. Insurance certificates may also be necessary.

For comprehensive guidance, consult the [Botswana Unified Revenue Service](#) website. All imported goods are subject to 14 percent VAT, except items listed in the Third Schedule of the VAT Act,

which are also exempt from customs duties. These exemptions are limited and rarely applicable to mainstream commercial enterprises. The [Botswana Trade Portal](#) provides a comprehensive list of required forms and serves as a reliable resource for exporters.

### 3.3 Botswana Language Labelling Requirements

All pre-packaged food and product labels must be in English. Labels must be legible, clear, and not misleading to consumers. The [Botswana Bureau of Standards](#) enforces mandatory labeling requirements including product name, ingredients list, net contents, manufacturer/supplier address, country of origin, and date markings. Imported products must prominently display importer or distributor information. Pharmaceutical products and certain other goods may be subject to additional labeling requirements as specified by [Botswana Bureau of Standards](#).

### 3.4 Tariffs and Free Trade Agreements (FTAs)

Botswana maintains an open, trade-oriented economy anchored by Southern African Customs Union (SACU) membership, which provides duty-free intra-regional trade and a common external tariff. Exporters can access tariff information through the following sources:

- [Tarriff Information](#): Available through the International Trade Administration.
- [BURS Tariff Book](#): Downloadable PDF providing detailed tariff schedules

### Trade Agreements

Botswana participates in several regional and continental trade agreements promoting economic integration and trade liberalization:

- [Southern African Customs Union \(SACU\)](#): As a member of SACU, Botswana applies a common external tariff and maintains duty-free, quota-free trade with South Africa, Namibia, Lesotho, and Eswatini.
- [SADC Free Trade Area \(FTA\)](#): Signed in 2008, this agreement provides duty-free treatment for 85 percent of goods traded within the Southern African Development Community.
- [EFTA-SACU Free Trade Agreement](#): Preferential trade agreement between SACU and the European Free Trade Association (Iceland, Liechtenstein, Norway, and Switzerland).
- [African Continental Free Trade Area \(AfCFTA\)](#): Ratified in February 2023, this agreement provides Botswana access to the broader African market through progressive tariff elimination on most goods.
- [Tripartite Free Trade Area \(TFTA\)](#): Integrates SADC, EAC, and COMESA into a larger, unified trading bloc.

## Trade Frameworks

- [Trade, Investment and Development Cooperative Agreement \(TIDCA\)](#): Framework agreement with the United States focusing on trade and investment facilitation, intended as a foundation for a potential future free trade agreement.

For detailed information, exporters should review respective agreements and consult the listed sources.

### 3.5 Trademarks and Patents Market Research

Botswana maintains a modern, robust intellectual property (IP) system governed by the [Industrial Property Act of 2010](#), aligned with international standards. Key features include pre-grant patent oppositions, traditional knowledge protection, and trademark protection renewable for ten-year periods. The Companies and Intellectual Property Authority (CIPA) administers Botswana’s intellectual property (IP) system.

**Disclaimer:** FAS Pretoria notes that patent and intellectual property information provided is for informational purposes only and should not be construed as legal advice. Exporters are strongly advised to consult qualified intellectual property attorneys in Botswana for specific legal matters.

## Section IV: Market Sector Structure and Trends

### 4.1 Top Sectors for Growth

**Table 2:** *Top Five Countries Exporting Consumer-Oriented Products to Botswana*

2025 Botswana Imports of Consumer-Oriented Products		
Country	Value (USD Millions)	Top 7 Product Categories
South Africa	544	Dairy products, bakery goods, beer, wine, non-alcoholic beverages, and condiments & sauces.
Namibia	9	Bakery goods, meat products, beer, fruit & vegetable juices, condiments & sauces, poultry meat, and eggs.
Zimbabwe	5	Tobacco, dairy products, eggs, bakery goods, chewing gum & candy, distilled spirits, and non-alcoholic beverages.
Brazil	4	Poultry meat and products, pork and pork products, chewing gum & candy, dog & cat food, beef & beef products, bakery goods, and processed vegetables.
Belgium	2	Poultry meat, pork & pork products, chewing gum & candy, dog & cat food, beef & beef products, bakery goods, and processed vegetables

Source: [Trade Data Monitor, LLC](#).

## 4.2 Consumer-Oriented Product Prospects Based on Growth Trends

**Table 3: Top Exports of Consumer-Oriented Products from the United States to Botswana**

Product	Annual Series (Value: Thousands)		
	2023	2024	2025 (Jan – Nov)
Total Consumer-Oriented	558	792	1,030
Distilled spirits	218	287	371
Soup & other food prep.	77	269	282
Beef & beef products	0.15	124	280
Non-alcoholic beverages	130	33	44
Tea	25	21	14
Tree nuts	1	0.02	10
Chocolate & cocoa products	1	2	9
Condiments & sauces	1	5	4
Processed fruit	0.18	0.041	3

Source: [Global Agricultural Trade System](#).

## 4.3 Retailer Information in Botswana

Botswana's retail sector represents a vital and expanding component of the national economy, contributing approximately 29 percent of GDP and serving as a significant employment generator. The sector is experiencing growth driven by expanding middle-class purchasing power. However, retailers face challenges including regional competition, high digital technology adoption costs, and the need for technological innovation to remain competitive.

**Table 4: Major Botswana Retailers**

Retailer	Website
Choppies	<a href="https://choppiesgroup.com/">https://choppiesgroup.com/</a>
Fours Cash & Carry	<a href="https://www.fours.co.bw/">https://www.fours.co.bw/</a>
Sefalana	<a href="https://www.sefalana.com/">https://www.sefalana.com/</a>
Spar	<a href="https://spar.co.bw/stores/">https://spar.co.bw/stores/</a>
Pick n Pay	<a href="https://pnpbotswana.co.bw/">https://pnpbotswana.co.bw/</a>

## 4.4 Market Opportunities for Consumer-Oriented Products

Botswana presents expanding market opportunities for consumer-oriented products driven by urbanization, lifestyle modernization, and rising disposable incomes. Key growth sectors include processed foods, natural ingredient personal care products, health-conscious goods, electronics, and e-commerce. While brick-and-mortar retail remains dominant, consumer demand is shifting toward reliable, high-quality, and environmentally sustainable products.

### Market Entry Strategy

U.S. companies typically enter the Botswana market by exporting through distributors and intermediaries, many based in South Africa, or by licensing products through local agents. This approach facilitates market entry, particularly for new exporters.

## Product Opportunities

Strong demand exists for convenient, competitively priced, health-conscious food products and premium imported snacks. Growing internet penetration and digital literacy are driving online retail demand, particularly for convenience and product variety. The retail sector is experiencing growth in private label brands offering value-priced alternatives to established national brands. Value-conscious consumers are gravitating toward either "time-energy saving" convenience solutions or premium, high-quality products.

Botswana offers substantial market potential for consumer-focused products supported by an expanding middle class, rising disposable incomes, and increasing digital adoption. While consumers demonstrate growing value-consciousness and preference for domestic, competitively priced retail brands, significant opportunities remain for artisanal, health-conscious, and convenience products.

### 4.5 Competitive Environment

U.S. agricultural exports face significant competition from Botswana's domestic industry and imports from COMESA and SACU trade bloc members. Ongoing negotiations to establish preferential tariff schedules under the African Continental Free Trade Area (AfCFTA) may further impact U.S. competitiveness in the region.

U.S. companies encounter intense competition from Asian, European, and Southern African Development Community (SADC) suppliers, particularly in fast-moving consumer goods categories. While the United States maintains a strong competitive position in high-quality mining equipment, price sensitivity and established regional logistics networks create competitive challenges in other sectors.

These market dynamics underscore the importance of carefully assessing regional trade agreements, logistics options, and competitive positioning when entering the Botswana market. Despite these challenges, the United States maintains competitive advantages in sectors requiring premium inputs, particularly in agriculture and specialized equipment.

## Section V: Agricultural and Food Imports

### 5.1 Agricultural and Related Food Import Statistics

**Table 5:** *U.S. Agricultural Exports to Botswana (USD thousands)*

	2020	2021	2022	2023	2024	2025
Consumer-Oriented	100	52	7	0	7	22
Agricultural Related Products	0	0	0	0	22	43
Intermediate	0	9	26	1,165	20	61
Bulk	0	344	0	0	0	0
Total	100	405	33	1,165	48	126

Source: [Global Agricultural Trade System](#)

For detailed information on U.S. exports of bulk, intermediate, and consumer-oriented (BICO) products to Botswana, consult the [FAS Global Agricultural Trade System](#) (GATS).

## 5.2 Best High-Value and Consumer-Oriented Product Opportunities

Botswana's relatively high consumer purchasing power supports steady demand growth for U.S. agricultural products. Key export opportunities for U.S. suppliers include:

- Live Mammals
- Onions and Shallots
- Fresh peppers & allspice
- Live plant cuttings
- Mushrooms
- Tobacco refuse
- Carrots
- Sugar beet seed
- Bovine meat

These product categories represent strong growth potential in Botswana's evolving consumer market.

## Section VI: Key Contacts and Further Information

### 6.1 USDA, Foreign Agricultural Service office for Southern Africa

For questions or comments regarding this report, contact the FAS Office of Agricultural Affairs at the U.S. Embassy in Pretoria:

Agricultural Affairs Office Physical Address: Office of Agricultural Affairs U.S. Embassy, Pretoria, South Africa 877 Pretorius Street, Arcadia, Pretoria, 0083 P.O. Box 9536, Pretoria, 0001	Phone: +27 12 431 4057 Email: <a href="mailto:AgPretoria@state.gov">AgPretoria@state.gov</a> Website: <a href="http://www.fas.usda.gov">http://www.fas.usda.gov</a>
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For additional market information, trade leads, and export assistance, U.S. companies are encouraged to contact FAS Pretoria or visit the FAS website for country-specific reports and trade data.

<https://www.fas.usda.gov/data>

### 6.2 Additional Useful Resources

The following resources provide valuable information and support for U.S. businesses and individuals seeking to engage with Botswana's market:

## **Business and Trade Organizations:**

- **American Business Council in Botswana (ABC):** Non-profit organization dedicated to building and strengthening economic ties between the United States and Botswana. [Visit Website](#)
- **U.S. Commercial Service:** Provides market entry support and trade promotion assistance to U.S. companies seeking to expand in Botswana. [Learn More](#)
- **U.S. International Trade Administration – Botswana Country Commercial Guide:** Comprehensive guide covering Botswana's business environment, trade opportunities, and regulatory landscape. [Access Guide](#)

## **Tourism and Hospitality:**

- **Botswana Tourism Organization:** Provides information on Botswana's tourism sector, including attractions, travel information, and investment opportunities. [Visit Website](#)
- **Hospitality and Tourism Association of Botswana (HATAB):** Industry association promoting and maintaining excellence in hospitality and tourism standards in Botswana. [Visit Website](#)

## **Agriculture:**

- **Botswana Agricultural Marketing Board (BAMB):** Established by Act of Parliament No. 2 of 1974, BAMB provides marketing services for locally grown scheduled crops including cereals, pulses/beans, and oilseeds, ensuring adequate supplies at affordable prices. [Visit Website](#)

## **Investment and Special Economic Zones:**

- **SEZA Botswana (Special Economic Zones Authority):** Information on Botswana's Special Economic Zones offering investment and trade incentives. [Visit Website](#)

These resources are essential for understanding Botswana's market dynamics, identifying commercial opportunities, and effectively navigating the country's business environment.

## Appendix 1: BICO Report



### U.S. Exports of Agricultural & Related Products to \*Botswana\* FY 2021 - 2025 and Year-to-Date Comparisons (in millions of dollars+)



Export Market: \*Botswana\*

Product	Fiscal Years (Oct-Sept)					October - November Comparisons		
	2021	2022	2023	2024	2025	2025	2026	%Chg
Bulk Total.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Tobacco.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Intermediate Total.....	0.0	0.0	1.1	0.0	0.0	0.0	0.1	-
Live Animals.....	0.0	0.0	1.1*	0.0	0.0	0.0	0.0	-
Sugar, Sweeteners, Bev. Bases..	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Intermediate Products.....	0.0	0.0	0.0	0.0	0.0	0.0	0.1	-
Consumer Oriented Total.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Processed Vegetables.....	0.0	0.0*	0.0	0.0	0.0	0.0	0.0	-
Food Preparations.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Condiments & Sauces.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Consumer Oriented.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Agricultural Related Products.....	0.0	0.0	0.0	0.0	0.1	0.0	0.0	-
Forest Products.....	0.0	0.0	0.0	0.0	0.1	0.0	0.0	-
Agricultural Products.....	0.0	0.0	1.1	0.0	0.0	0.0	0.1	1430.0
Agricultural & Related Products.....	0.0	0.0	1.1	0.0	0.1	0.0	0.1	1430.0

Prepared By: Trade & Economic Analysis Division/GMA/FAS/USDA  
Source: U.S. Census Bureau Trade Data

\* Denote Highest Export Levels Since at  
Least FY 1970

[www.fas.usda.gov/GATS](http://www.fas.usda.gov/GATS)  
[GATSHelp@fas.usda.gov](mailto:GATSHelp@fas.usda.gov)

Biodiesel aggregate includes only higher-level and pure biodiesel HTS chapter 38 codes; biodiesel blends below 30% by volume (aka. petroleum oils containing biodiesel) found in chapter 27 are excluded.

## Appendix 2: Botswana Hotel and Tourism Sectors

### Tourism Sector

Tourism was virtually non-existent when Botswana gained independence in 1966. A transformative period began in 1992 with passage of the Wildlife Conservation and National Parks Act, which recognized wildlife as an economic resource. The legislation designated 20 percent of the country as Wildlife Management Areas (WMAs) and 17 percent as national parks and game reserves. This framework enabled development of a thriving tourism sector centered on abundant wildlife and natural resources in northern Botswana, particularly the Okavango Delta (world's largest inland wetland), Chobe National Park, and Moremi Game Reserve.

Recent surveys rank Botswana as the world's premier safari destination. The country encompasses the Central Kalahari Game Reserve (CKGR), the world's second largest and Southern Africa's largest wildlife reserve at 52,800 square kilometers. The Okavango Delta, a UNESCO World Heritage Site, spans 15,000 square kilometers during the dry season and expands to 22,000 square kilometers during the wet season, making it the world's largest inland delta.

Botswana's extensive and diverse wildlife resources support primarily non-consumptive uses such as ecotourism, with subsistence hunting and game ranching contributing smaller shares. While tourism contributes less than 5 percent of GDP, the sector plays a significant economic role. Recognizing

tourism's growth potential, the Government of Botswana prioritized the sector within its economic diversification strategy. Botswana is expanding its tourism market beyond traditional high-end clientele to include mid-range segments, aiming to increase revenue and employment generation.

The government actively promotes alternative tourism models including agro-tourism and cultural tourism to enhance visitor experiences and diversify offerings. The government remains a key player in tourism project development and encourages new investments and joint ventures. The sector is expanding with emphasis on diversifying from high-end to mid-range segments, enhancing meetings, incentives, conferences, and exhibitions (MICE) capacity, and creating local employment.

### **Tourism Business Model**

Botswana's tourism strategy emphasizes lower visitor numbers and higher average daily rates—locally termed "high value, low volume" tourism. This approach has prevented overtourism and enabled wildlife populations to thrive.

### **Opportunities for U.S. Suppliers**

U.S. producers can leverage investment incentives including low corporate tax rates to supply Botswana's tourism sector. High-end tourism expansion drives demand for specialized products, and strategic partnerships can access government procurement preferences. Botswana's high-value, low-volume tourism focus creates demand for premium, specialized products including luxury food items that can be sourced from the United States. U.S. exporters can partner with local businesses to navigate government tenders where citizen-owned businesses receive 5-15 percent preferential price margins. Botswana provides access to the broader Southern African Customs Union (SACU) and African Continental Free Trade Area (AfCFTA) markets.

### **Hotel Sector**

Botswana's hotel sector represents a high-value, low-volume industry contributing significantly to employment and foreign exchange earnings. The sector is driven by luxury photographic safaris, eco-tourism, and business travel. The market encompasses urban hotels in Gaborone and upscale resorts in the Okavango Delta. Key trends include eco-friendly, sustainable design and post-COVID expansion of domestic travel.

Major brands include Cresta Hotels, Hilton Garden Inn, Peermont, and specialty luxury operators such as Wilderness Safaris. Development potential exists in regional parks, along the Trans-Kalahari Highway, and through cultural tourism expansion. The sector is recovering from COVID-19 with particular emphasis on product diversification to attract domestic tourists beyond traditional high-end international visitors. Hotels increasingly emphasize eco-tourism to minimize environmental impact. Significant visitor arrivals originate from South Africa, Namibia, Zambia, and Zimbabwe. The sector offers diverse accommodation options including hotels, campsites, and luxury lodges.

## **Opportunities for U.S. Companies**

U.S. companies can capitalize on Botswana's expanding hotel sector by entering a market experiencing growth in upscale and international brands, particularly in Gaborone and wildlife-protected areas. U.S. producers and intellectual property holders could benefit from supplying luxury resorts in northern Botswana, which source products including meat and vegetables from surrounding areas. Genetics and seed technology could be utilized at sites surrounding luxury resorts, establishing supply chains benefiting both hotels and U.S. producers.

Botswana's rich cultural heritage and traditions enable cultural tourism expansion. Conservation initiatives prioritizing community engagement and environmental sustainability present strong investment opportunities. Expansion of air connectivity to neighboring countries represents another growth area.

## **Attachments:**

No Attachments.