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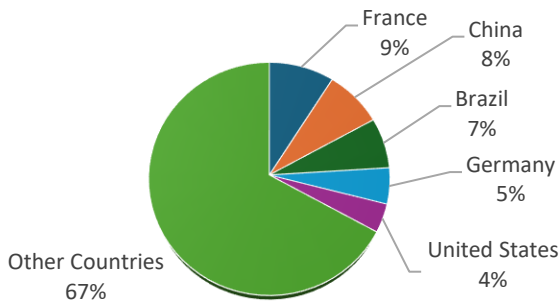
South Africa commands of the most sophisticated and diversified economies on the African continent, underpinned by a robust commercial sector and well-developed supply chain and distribution infrastructure. While the country's largely self-sufficient agricultural production base satisfies the preponderance of domestic staple food requirements, the market presents significant export development opportunities for U.S. suppliers — particularly in consumer-oriented food products and value-added ingredients destined for South Africa's dynamic food processing sector. Expanding health consciousness among South African consumers, coupled with demonstrated receptivity to novel and premium product offerings, is generating measurable demand pull for U.S. specialty food and beverage exports; however, U.S. exporters seeking to capture market share must navigate entrenched domestic competition, preferential tariff arrangements afforded to third-country suppliers under regional trade frameworks such as the African Continent

Market Fact Sheet: South Africa

Executive Summary

South Africa is a middle-income developing market with an estimated population of 63.1 million, where real GDP growth expanded from 0.5 percent in 2024 to 1.1 percent in 2025 — lifting nominal output from \$401.14 billion to approximately \$427.44 billion — driven largely by a recovery in the agricultural sector. Despite a high degree of domestic self-sufficiency across key commodity categories, the country's evolving consumer base and expanding food processing industry continue to generate meaningful export development opportunities for U.S. suppliers of consumer-oriented food products and value-added ingredients.

Imports of Consumer-Oriented Products



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

Food Retail Industry

In 2025, South Africa's food retail sector recorded modest volume growth and stable margins against a backdrop of approximately 3.9 percent food price inflation. Fiscal pressure on household budgets intensified consumer demand for value-driven purchasing, accelerating uptake of discount programs and loyalty platforms while bolstering the competitive position of discount and traditional trade channels.

Food Processing Industry

In 2025, South Africa's food processing sector was characterized by steady expansion, margin compression, and shifting consumer preferences. A persistent structural reliance on imported food ingredients and value-added inputs continues to underpin significant market access opportunities for U.S. exporters of consumer-oriented products and processing-grade commodities.

Food Service Industry

South Africa's (SA) food service sector demonstrated both resilience and vulnerability, driven by robust expansion in quick-service restaurants and the accelerating emergence of "cloud kitchens". The sector was further defined by strong transaction volumes, evolving culinary preferences, and the distinct socioeconomic dynamics that continue to shape market access and last-mile distribution across SA's diverse trade area.

2025 Quick Facts

Imports of Consumer-Oriented Products: \$3.7 billion

List of Top 10 Growth Products in South Africa

- 1) Chocolate & cocoa products
- 2) Coffee
- 3) Fresh fruit
- 4) Distilled spirits
- 5) Non-Alc. beverages
- 6) Tree nuts
- 7) Dog & cat food
- 8) Bakery goods, cereals & pasta
- 9) Nursery products
- 10) Chewing gum & candy

South African Food Industry by Channels

Food Industry Output	\$61.4 billion
Food Exports	\$15.2 billion
Food Imports	\$8.3 billion
Retail	\$55 billion
Food Service	\$6.4 billion

Food Industry Gross Sales

Food Industry Revenue –	\$5.5 billion
Food (Domestic market) –	\$5.6 billion

Top 10 South African Food Retailers

1. Shoprite
2. Pick n Pay
3. Spar Group Ltd.
4. Woolworths
5. Massmart Holdings
6. Food Lovers Market
7. Boxer Superstores
8. OK Franchise Division
9. Kit Kat Cash & Carry
10. Choppies Enterprises

GDP/Population

Population:	63.1 million people
GDP:	\$427.44 billion
GDP per capita:	\$6,769

Sources: Trade Data Monitor, LLC., Statistics South Africa (Stats SA), Euromonitor International, GATS, local trade contacts, local industry publications, international supermarket news and trade press

Strengths	Weaknesses
Advanced logistics infrastructure, modern retail chains, and well-established regional distribution networks position South Africa as a capable and strategically advantageous entry point for U.S. exporters.	Exchange rate volatility undermines importer purchasing behavior and landed cost competitiveness, while last-mile logistics reliability remains an operational concern despite incremental port improvements.
Opportunities	Challenges
A digitally engaged, social media-influenced consumer base is driving demand for branded and premium food and beverage products, while the country's role as a principal regional distribution hub extends U.S. export reach across Southern Africa.	U.S.-origin goods face import tariff exposure — with additional levies on animal-derived products — while licensing requirements and certification procedures add regulatory complexity and lead time to market entry planning.

Section I: Market Overview

South Africa ranks among Africa's most sophisticated and diversified economies, placing 38th globally in nominal GDP and 33rd in purchasing power parity (PPP). With an estimated GDP of \$427 billion in 2025, South Africa maintains the continent's largest economy, supported by a dynamic commercial sector and well-developed agricultural distribution networks serving key urban centers across Southern Africa. The Agriculture, Forestry, and Fishing sectors were the primary driver of economic growth in 2025, expanding by a notable 17.4 percent and providing critical resilience against output contraction in other sectors. South Africa's commercial agricultural sector is broadly self-sufficient across most staple commodities, except for wheat, rice, and poultry, yet meaningful export development opportunities remain for U.S. suppliers, particularly in value-added inputs for the food processing sector.

Labor market conditions in 2025 were mixed. Following a difficult first half, modest improvements emerged by year-end, with agricultural employment reaching over 950,000 jobs — the highest level since Q3 2023. The national unemployment rate declined incrementally from 32.9 percent in Q1 to 31.4 percent in Q4, with formal sector employment trending upward while informal sector employment contracted.

Several notable market developments shaped the trade environment in 2025. Under a bilateral trade framework agreement, South Africa established conditional procedures granting U.S. poultry access under a tariff rate quota. South Africa also opened its market to U.S. blueberry imports, expanding the portfolio of U.S. agricultural products eligible for entry. On the investment side, U.S. retail giant Walmart, which already holds ownership of local distributor Massmart, announced plans to develop its own branded brick-and-mortar retail locations in South Africa. For additional market intelligence, refer to relevant GAIN publications including [*Southern Africa Shortages Boost United States Corn and Soybean Exports Benefiting American Farmers*](#), [*Cranberry Market Soars in South Africa*](#) and [*The South African Dairy Industry*](#).

South African consumer confidence fluctuated considerably in 2025. Persistent cost-of-living pressures prompted households to prioritize debt reduction and redirect expenditure toward essential goods. Purchasing behavior became increasingly deliberate and value-driven, with many consumers shifting food and beverage procurement to informal market channels and general traders to access bulk purchasing and promotional pricing. Despite fiscal constraints, demand for food and lifestyle products aligned with convenience, sustainability, and health continued to trend upward.

1.1 Population and Key Demographic Trends

South Africa's population reached 63.1 million in 2025, reflecting year-over-year growth of 1.37 percent. Gauteng remained the most populous province with approximately 16.1 million residents — 25.5 percent of the national population — while the Northern Cape remained the least populous. Females accounted for approximately 51 percent of the population at 32.2 million persons. The 0–24 age cohort, comprising 16.5 million individuals or 26.2 percent of the population, represents a youthful, consumer-oriented demographic segment with significant long-term market development potential. Improvements in healthcare access contributed to declining infant and under-five mortality rates. Elevated youth unemployment continues to place financial strain on older household members, who

frequently provide economic support to younger dependents — a dynamic that constrains overall household purchasing power.

South Africa's economy expanded by 1.1 percent in 2025, its strongest annual growth since 2022, supported by sustained consumer spending, easing inflation, and interest rate reductions. The country retains its official classification as an upper-middle-income economy; however, significant socioeconomic dualism persists, with an average unemployment rate of approximately 32 percent continuing to weigh on broad-based economic participation.

1.2 Size of Economy, Purchasing Power, and Consumer Behavior

South Africa's estimated \$427 billion GDP positions it as the largest economy in Sub-Saharan Africa. Despite this scale, an official unemployment rate of 32.4 percent — likely understated in the informal sector — materially constrains consumer purchasing power. Headline inflation averaged 3.2 percent in 2025, the lowest annual rate recorded since 2004, driven by base effects, a strengthening local currency, and declining global energy prices. Food and non-alcoholic beverage inflation averaged 4.4 percent in December 2025, with supply-side disruptions contributing to elevated meat prices.

GDP at purchasing power parity (PPP) rose from \$1.291 trillion in 2024 to approximately \$1.308 trillion in 2025, reflecting measured economic expansion when adjusted for local price levels and cost of living. However, this growth was insufficient to meaningfully shift consumer expenditure from essential goods toward premium imported products. Key growth drivers included a 17 percent rebound in the agricultural sector, reduced load-shedding frequency, and increased consumer spending supported by declining inflation.

The South African Rand averaged approximately R18.75 to the U.S. dollar in 2025, closing the year approximately 13 percent stronger than its 2024 average of R18.33. Despite this currency appreciation, South African importers faced significant headwinds in 2025, including the impact of U.S. tariff policy adjustments, the expiration of the African Growth and Opportunity Act (AGOA), and international shipping disruptions that adversely affected trade flows, supply chain reliability, and freight costs.

Consumer behavior in 2025 was defined by cautious optimism and an intensified focus on value. Persistent economic constraints drove deal-seeking behavior, with consumers prioritizing discounts, transparent pricing, and cost reduction over traditional brand loyalty — while maintaining expectations around digital convenience, ethical sourcing, and health-oriented products. The continued expansion of Amazon South Africa into grocery and health supplement categories introduced new competitive dynamics to the domestic e-commerce landscape.

1.3 Overall Business Climate

South Africa's business environment in 2025 showed incremental signs of stabilization, as easing energy constraints and declining inflation supported a modest recovery in private sector confidence, even as overall GDP growth remained in the range of 0.5 to 0.9 percent. Operational headwinds persisted, including over 1,500 firm liquidations, chronic logistics bottlenecks, and elevated unemployment. Consecutive primary budget surpluses contributed to improved fiscal credibility and enhanced economic confidence.

The agricultural sector delivered a record-breaking performance in 2025, reinforcing its role as both an economic stabilizer and a key source of foreign exchange earnings. Despite this strength, South Africa remains a structural net importer of several essential commodities, including wheat, rice, palm oil, poultry, and distilled spirits, primarily due to climatic constraints. Imported poultry accounts for approximately 20 percent of annual domestic consumption, sourced predominantly from Brazil, the European Union, and the United States.

Total agricultural imports reached \$8.3 billion in 2025, yet robust export sector performance enabled South Africa to achieve a record agricultural trade surplus of \$6.9 billion for the year.

Table 1: *South Africa’s Top 10 Agricultural Imports in 2025*

Oilseed Oil	Distilled spirits
Wheat	Coffee
Rice	Broiler Meat
Essential Oils	Soup & other food preparations
Sugars & sweeteners	Waters & non-alcoholic beverages

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

1.4 Recent Trends

South Africa's retail sector achieved real-term sales growth in 2025, shaped by value-seeking consumer behavior, accelerating digital adoption, and growing preference for locally sourced and sustainably produced products. Promotional marketing and loyalty programs emerged as primary purchase decision drivers as consumers managed inflationary pressures and household debt. Notably, nearly half of South African consumers actively favored domestic platforms and home-grown brands over multinational alternatives — a trend that incentivized smaller retailers to differentiate through uniquely South African product offerings ([Hivve Retail](#)).

The monthly cost of a basic food basket ranged from approximately \$180 to \$310 USD in 2025, depending on basket composition. An average household of four typically spent between R8,000 and R10,000 per month (approximately \$430–\$540 USD at 2025 exchange rates). Consumer expenditure on animal proteins, oils and fats, and fresh produce trended higher, while bread and cereal prices eased modestly in line with global commodity trends. For detailed food price and wage tracking data, refer to official publications from the National Agricultural Marketing Council ([NAMC](#)).

The table below summarizes key advantages and challenges for U.S. exporters entering the South African market.

Table 2: *Advantages and Challenges Facing the U.S. Exporters to South Africa*

Advantages	Challenges
Low Market Entry Barriers: Robust infrastructure, widespread English proficiency, a sophisticated financial services sector, and a well-established legal framework reduce barriers for new market entrants.	Port Congestion: Chronic congestion at South African ports — driven by aging equipment, adverse weather, and structural inefficiencies at Transnet-operated facilities — disrupts supply chain reliability and increases landed costs.

Youth Preference for U.S. Brands: Younger consumers demonstrate strong affinity for processed and convenience food products, particularly those with high visibility across television, film, and social media platforms.	Eco-Friendly Packaging Demand: Growing consumer preference for sustainable packaging creates compliance considerations for U.S. exporters whose packaging standards may not align with local market expectations.
Diverse, Developed Economy: South Africa's advanced and diversified economic base provides exporters with access to a robust financial sector and well-established service industry infrastructure.	Currency Fluctuations: Rand-dollar exchange rate instability complicates financial planning and cost forecasting, particularly for smaller exporters and new market entrants.
Expanding Retail Channels: Growth in modern food retail formats and rapid delivery services, particularly for temperature-sensitive products, expands distribution reach and market access potential.	High Internet Costs: Elevated data costs constrain e-commerce participation among lower-income consumer segments, limiting the full growth potential of digital retail channels.
Strong Quality Perception: U.S. consumer food products, including snack foods and confectionery, are broadly recognized for quality and command strong consumer demand.	Poultry Sector Reputation: While U.S. consumer products are generally well regarded, U.S. poultry continues to face reputational headwinds in the South African market, notwithstanding ongoing trade promotion efforts.
Capable Import Partners: South Africa's importer community includes experienced, reputable trading and investment partners well-positioned to support U.S. market entry.	Preferential Trade Agreements: Existing free trade arrangements with European and BRICS-affiliated nations afford competitor suppliers preferential tariff access, placing U.S. exports at a relative cost disadvantage.
Affluent Consumer Segment: A growing middle class and the wealthiest consumer base on the African continent present attractive return potential for U.S. exporters targeting premium and value-added product categories.	Political and Economic Risk: Elevated unemployment, governance inefficiencies, and administrative corruption present operational risks for international firms operating in the market.
Demand for Food Ingredients: Domestic production capacity for specialty food ingredients is insufficient to meet industry demand, creating consistent procurement opportunities for high-quality U.S. suppliers.	Regional Ingredient Sourcing Competition: South African food manufacturers frequently source certain ingredients from lower-cost neighboring country suppliers, creating price-based competition for U.S. exporters.
Modern Retail Infrastructure: Large-format retail chains offer dedicated shelf space for private-label and imported food and beverage product lines, supporting one-stop shopping and broad consumer reach.	Regulatory Compliance Burden: Food safety, phytosanitary, and labeling requirements can restrict import eligibility and disproportionately increase per-unit compliance costs for smaller shipment volumes.

Section II: Exporter Business Tips

2.1 Market Research

U.S. exporters are strongly encouraged to conduct thorough market research prior to entering the South African market, encompassing import policies and procedures, regulatory requirements, market growth trajectories, and evolving consumption patterns. FAS/Pretoria publishes annual GAIN reports across a range of South African agricultural sectors, available at the [GAIN website](#). Relevant sector reports include, but are not limited to:

- [Retail Foods Annual](#)
- [Grain and Feed Update](#)
- [Citrus Annual](#)

Supplementary market research may be obtained through the following private sector research firms:

- [BMI Research Pty Ltd](#)
- [Ipsos South Africa](#)
- [KLA Market Research](#)
- [South African Marketing Research Association \(SAMRA\)](#)

For a comprehensive overview of import rules and regulations, refer to Section 3 of this report.

2.2 Local Business Customs and Trends

South African business culture blends relationship-driven networking with Western professional norms. Building trust through in-person engagement, consistent punctuality, and respect for organizational hierarchies is essential to establishing productive trade relationships. U.S. agricultural exporters are advised to partner with a reputable importer or distributor with demonstrated experience in the South African food and beverage sector, as established supply chain relationships can significantly accelerate market entry.

South African small and medium enterprises (SMEs) in 2025 broadly adopted three strategic priorities: community-oriented localized retail, accelerated digital transformation, and a transition toward sustainable and green operational practices. Stabilizing energy infrastructure and interest rate relief improved operating conditions, while global supply chain pressures and inflation compelled SMEs to adopt flexible financing solutions and sharpen pricing strategies.

FAS/Pretoria serves as a critical in-market resource for U.S. exporters. An in-country visit is strongly recommended for U.S. companies seeking to develop export opportunities, as direct engagement facilitates relationship-building, firsthand market assessment, and identification of prospective trade partners. U.S. exporters are encouraged to contact FAS/Pretoria regarding upcoming regional trade events and to engage with State Regional Trade Groups (SRTGs), industry cooperator organizations, and relevant trade associations for additional market entry support.

2.3 General Consumer Tastes and Trends

South African consumers in 2025 recalibrated purchasing behavior to balance cost-conscious, value-driven decision-making with sustained demand for authentic experiences and wellness-oriented products. Elevated costs of living have accelerated the importance of deliberate spending, private-label adoption, and digital discovery. South African retail food sales totaled an estimated \$55 billion in 2025. Key consumer trends shaping the market include:

- **Value-Driven Purchasing:** Financially constrained consumers are actively leveraging digital applications and promotional platforms to maximize purchasing power and access discounts.
- **Dual-Channel Shopping:** Consumers seamlessly integrate online and in-store procurement, frequently coordinating bulk purchases around monthly salary disbursement cycles.
- **Private-Label Expansion:** Value-conscious shoppers at major retail chains are increasingly substituting premium branded products with competitively priced, high-quality private-label alternatives.
- **Flame & Smoke Culinary Trends:** Wood-fired, smoky, and braai-inspired preparation methods remain deeply embedded in South African food culture, with restaurants expanding charred cooking techniques across menus.
- **Global Fusion Dining:** Demand for sophisticated Asian cuisines, such as dim sum and sushi, and Mediterranean fusion concepts is growing, particularly in major metropolitan areas such as Johannesburg.
- **Fresh and Clean-Label Products:** According to PwC's [Voice of the Consumer 2025](#) survey, 70 percent of South African consumers are actively reducing consumption of ultra-processed foods in favor of fresh, whole-food alternatives — a trend with direct implications for U.S. exporters of natural and minimally processed products.
- **Holistic Wellness:** Consumers are broadly defining wellness to encompass diet, sleep, and stress management, driving demand for functional food ingredients, natural supplements, and health-forward product formulations.
- **Mobile-First Commerce:** Smartphones account for approximately 73 percent of web traffic and more than half of all online transactions, underscoring the importance of mobile-optimized digital marketing and e-commerce strategies for U.S. exporters.
- **Resilient Consumer Spending:** Despite persistent cost pressures, [Statistics SA data](#) indicate that South African consumer spending remained broadly stable throughout 2025, supporting continued retail sector activity.

Section III: Import Food Standards, Regulations and Procedures

Compliance with South Africa's food laws and regulations is a prerequisite for U.S. agricultural exporters entering this market. FAS/Pretoria publishes annual Food and Agricultural Import Regulations and Standards (FAIRS) reports covering applicable standards, documentation requirements, and regulatory procedures. The [2025 FAIRS Country Report](#) details documentation requirements for U.S. food and agricultural exports to South Africa, while the [2025 FAIRS Annual Certificate Report](#) provides a comprehensive summary of relevant standards and regulations. U.S. exporters are strongly encouraged to consult both reports prior to market entry.

3.1 Customs Clearance

Detailed customs clearance procedures are outlined in the [FAIRS Annual Country Report](#).

3.2 Documents Generally Required by South Africa Authorities for Imported Food

The [FAIRS Annual Country Report](#) and the [FAIRS Export Certificate Report](#) provide comprehensive guidance on documentation requirements for specific commodity categories. The following documents are generally required for all shipments to South Africa, in addition to any applicable import permits and health certificates:

- **Commercial Invoice:** Must itemize the price paid by the importer, inclusive of loading costs at the port of export.
- **Bill of Entry Documentation:** Must itemize the price paid by the importer, inclusive of loading costs at the port of export.
- **Bill of Lading:** A legally binding document issued by a carrier to a shipper. It acts as a detailed receipt for goods, a contract for their transportation, and a document of title proving ownership of the cargo.
- **Insurance Documentation:** Required specifically for sea freight. It outlines the type of coverage, value of the goods, and terms of the shipment
- **Importer/Exporter Code:** All business exporters must register with the South African Revenue Service (SARS) to obtain a unique customs code. Registration is completed via submission of [Form DA 185](#).
- **ITAC Permit:** Depending on the agricultural commodity, an import permit may be required from the [International Trade Administration Commission \(ITAC\)](#).
- **Phytosanitary or Sanitary Certificate:** Issued by the competent agricultural authority in the exporting country, this certificate attests that plant or animal products are free of pests and disease and meet South Africa's import health requirements.
- **Certificate of Origin:** Required where products are eligible for preferential tariff treatment under applicable trade agreements.
- **Additional Documentation:** May include laboratory test results, organic certification, or other documentation as required by the importer or South African regulatory authorities.

3.3 South Africa Language Labelling Requirements

Product labels must be in English. For detailed labeling specifications, refer to the [FAIRS Annual Country Report](#).

3.4 Tariffs and Free Trade Agreements (FTAs)

South African tariff schedules and applicable trade agreement information are available through the following sources:

- [Tariff Information](#)
- [Tariff Investigations, Amendments, and Trade Remedies](#)

Applicable Trade Agreements:

- [Southern African Customs Union \(SACU\) Agreement](#) — Botswana, Lesotho, Namibia, South Africa, and Eswatini
- Treaty of the [Southern African Development Community](#) (SADC) and Protocols
- [Preferential Trade Agreement between the Southern Common Market \(MERCOSUR\) and SACU](#)
- [SADC-EU Economic Partnership Agreement](#)
- Agreement establishing the [African Continental Free Trade Area](#) (AfCFTA)

U.S. exporters should carefully assess the tariff implications of these agreements, as preferential access afforded to third-country suppliers under several of these frameworks may affect the price competitiveness of U.S.-origin goods at the point of entry.

3.5 Trademarks and Patents Market Research

Trademark and patent protections in South Africa are administered by the [South Africa Companies and Intellectual Prosperities Commission](#) (CIPC). For detailed guidance, refer to Section VIII of the [FAIRS Annual Country Report](#).

Section IV: Market Sector Structure and Trends

4.1 Top Sectors for Growth

Table 3: Top Five Countries Exporting Consumer-Oriented Products to South Africa

2025 South African Imports of Consumer-Oriented Products		
Country	Value (USD Millions)	Top 7 Product Categories
France	330	Distilled spirits, dairy products, wine & related products, coffee, pork & pork products, dog & cat food, processed vegetables.
China	301	Fruit & vegetable juices, meat products, processed vegetables, spices, chewing gum & candy, soup & other food preparations, processed fruit.
Brazil	267	Poultry meat & products, meat products, pork & pork products, processed fruit, dog & cat food, chewing gum & candy, spices
Germany	176	Soup & other food preparations, coffee, distilled spirits, dairy products, chocolate & cocoa products, beer, processed vegetables
United Kingdom	162	Distilled spirits, bakery goods, pork & pork products, soup & other food preparations, chocolate & cocoa products, condiments & sauces, beef & beef products.

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

4.2 Consumer-Oriented Product Prospects Based on Growth Trends

Notable export development opportunities are evident in several high-growth categories. Dairy products recorded the strongest year-over-year growth trajectory, rising from \$7.7 million in 2023 to \$17.2

million in 2025. Wine and related products demonstrated significant recovery, expanding from \$551,503 in 2024 to \$5.5 million in 2025. Soup and other food preparations sustained consistent upward momentum across the three-year period. Conversely, poultry meat and products experienced a marked contraction — from \$35.4 million in 2023 to \$12.9 million in 2025 — reflecting ongoing market access constraints and competitive pressures in that sector.

Table 4: Top Exports of Consumer-Oriented Products from the United States to South Africa

Product	Annual Series (Value: USD)		
	2023	2024	2025
Total Consumer-Oriented	162,141,935	122,538,415	132,047,280
Tree Nuts	24,788,406	24,950,413	23,888,790
Soup & Other Food Preparations	18,620,566	19,562,966	21,572,491
Distilled Spirits	23,852,218	15,426,273	19,761,118
Dairy Products	7,716,161	9,684,950	17,231,786
Poultry Meat & Meat Prods. (ex. eggs)	35,418,843	15,654,590	12,855,480
Condiments & Sauces	7,260,030	8,251,271	7,344,842
Meat Products	4,149,590	4,920,617	5,918,108
Wine & related products	669,870	551,503	5,531,650
Fruit & Vegetable Juices	2,784,611	3,646,962	2,939,990
Processed Fruit	2,864,964	3,189,133	2,579,777

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

4.3 Retailer Information

South Africa's modern retail sector operates in a highly competitive environment, with major chains deploying loyalty programs, promotional pricing, group discount structures, and e-commerce platforms with home delivery capabilities to attract and retain consumers. For comprehensive analysis of the food retail landscape, refer to the [2025 Retail Foods Report](#).

Table 5: Major South African Food Retailers

Retailer	Website
Shoprite Holdings Ltd	http://shopriteholding.co.za
Massmart Holdings (Walmart)	https://massmart.co.za
Woolworths Holdings Ltd	https://woolworths.co.za
Pick n Pay Retailers Pty Ltd	http://www.picknpay-ir.co.za
The Spar Group Ltd	http://www.spar-international.com/contry/southafrica

4.4 Market Opportunities for Consumer-Oriented Products

South Africa serves as a principal commercial distribution hub for the Southern African region and demonstrates consistent receptivity to U.S. food and beverage trends. The hotels, restaurants, and institutions (HRI) sector generated \$21.65 billion in sales in 2025, representing notable year-over-year growth. For detailed HRI sector analysis, refer to the [2024 Food Service \(HRI\) report](#).

Shifting consumer preferences and the continued expansion of modern retail channels are driving increased demand for specialty products such as distilled spirits, tree nuts, and snack foods, alongside health-oriented alternatives such as plant-based, sugar-free, functional, and gluten-free product

formulations. This wellness-driven demand trajectory presents a meaningful export development opportunity for U.S. suppliers positioned to deliver differentiated, premium, and health-forward offerings that align with evolving South African consumer priorities.

4.5 Competition to U.S. Exports

U.S. exporters face a complex and increasingly competitive trade environment in South Africa. Third-country suppliers — particularly those from BRICS-affiliated nations — are expanding their market presence and product penetration. South Africa's preferential trade architecture further disadvantages U.S.-origin goods: existing free trade agreements with the European Union (EU) and the Southern African Development Community (SADC), combined with preferential tariff arrangements under the MERCOSUR-SACU agreement, afford competitor suppliers materially lower duty rates at the point of entry. Ongoing negotiations regarding preferential tariff schedules under the African Continental Free Trade Area (AfCFTA) framework introduce additional competitive risk that U.S. exporters should monitor closely when assessing long-term market positioning and pricing strategy.

Section V: Agricultural and Food Imports

5.1 Agricultural and Related Food Import Statistics

Table 6: U.S. Agricultural Exports to South Africa (USD millions)

	2021	2022	2023	2024	2025
Consumer-Oriented	185	188	153	111	130
Intermediate	101	139	66	67	72
Bulk	21	24	18	61	101
Total	307	351	237	239	303

Source: [USDA FAS Global Agricultural Trade System \(GATS\)m](#)

Total U.S. agricultural exports to South Africa recovered to \$303 million in 2025, approaching the 2022 peak of \$351 million. Bulk commodity exports drove much of this recovery, more than doubling from \$61 million in 2024 to \$101 million in 2025. Consumer-oriented exports also rebounded from a four-year low of \$111 million in 2024 to \$130 million in 2025, signaling renewed market access momentum. For comprehensive bulk, intermediate, and consumer-oriented (BICO) export data, refer to the [FAS Global Agricultural Trade System](#) (GATS).

5.2 Best High-Value and Consumer-Oriented Product Opportunities

Despite the purchasing power constraints facing many South African consumers, demand for U.S. agricultural products continues to expand across key high-value categories. Priority export development opportunities for U.S. suppliers include distilled spirits, dairy products, tree nuts, condiments and sauces, processed vegetables, dog and cat food, wine and related products, eggs and egg products, nursery products, and fresh vegetables. U.S. exporters are encouraged to align product positioning with South Africa's growing consumer preference for premium, health-oriented, and branded food and beverage offerings to maximize competitive differentiation in these segments.

Section VI: Key Contacts and Further Information

6.1 FAS South Africa

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

Agricultural Affairs Office	Phone: +27 12 431 4057
Physical Address:	Email: AgPretoria@state.gov
Office of Agricultural Affairs	Website: http://www.fas.usda.gov
U.S. Embassy, Pretoria, South Africa	
877 Pretorius Street,	
Arcadia, Pretoria, 0083	
P.O. Box 9536, Pretoria, 0001	

For a directory of relevant South African government agencies, refer to the [South African FAIRS Country Report](#). Additional FAS market and commodity reports are available at <https://www.fas.usda.gov/data>

6.2 Additional Useful Resources

The following organizations and agencies provide supplementary trade, regulatory, and market intelligence resources for U.S. exporters operating in or entering the South African market:

Organization

American Chamber of Commerce in South Africa
U.S. Commercial Service – South Africa
U.S. ITA – South Africa Country Commercial Guide
Corporate Council on Africa (CCA)
U.S. Export-Import Bank (EXIM)
U.S. International Development Finance Corporation (DFC)
Franchise Association of South Africa
Restaurant Association of South Africa
South African Tourism
Federated Hospitality Association of South Africa (FEDHASA)
Tourism Grading Council of South Africa
Department of Trade, Industry and Competition (the dtic)
South African Revenue Service (SARS)
National Agricultural Marketing Council (NAMC)
Business Unity South Africa (BUSA)
South African Chamber of Commerce and Industry (SACCI)

Website

amcham.co.za
trade.gov/south-africa
trade.gov
africacncl.org
exim.gov
dfc.gov
fasa.co.za
restaurant.org.za
tourism.gov.za
fedhasa.co.za
tourismgrading.co.za
thedtic.gov.za
sars.co.za
namc.co.za
busa.org.za
sacci.org.za

Organization

Trade Forward Southern Africa (TFSA)

Wesgro Trade Promotion

Gauteng Growth and Development Agency (GGDA)

International Trade Administration Commission (ITAC)

Website

tfsouthernafrika.org

wesgro.co.za

ggda.co.za

itac.org.za

Appendix 1:BICO Report



U.S. Exports of Agricultural & Related Products to "South Africa"
FY 2021 - 2025 and Year-to-Date Comparisons
(In millions of dollars+)



Export Market: "South Africa"

Product	Fiscal Years (Oct-Sept)					October - April Comparisons		
	2021	2022	2023	2024	2025	2025	2026	%Chg
Bulk Total	43.0	24.2	21.5	4.9	159.0	112.9	4.4	-96.1
Wheat.....	10.0	11.2	10.6	0.0	46.4	2.6	2.6	1.0
Corn.....	0.0	0.0	0.0	0.0	58.6	58.6	0.0	+100.0
Coarse Grains (excl. corn).....	4.0	4.4	9.3	3.8	0.0	0.0	0.0	-
Rice.....	1.0	0.5	0.5	0.2	0.2	0.1	0.2	256.7
Soybeans.....	25.0	0.0	0.0	0.0	46.3*	46.3	0.0	-
Oilseeds (excl. soybean).....	1.0	0.6	0.0	0.0	0.1	0.0	0.0	-
Cotton.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Pulses.....	1.0	6.8	0.7	0.5	6.2	4.7	1.3	-72.0
Tobacco.....	0.0	0.0	0.0	0.0	0.8	0.4	0.0	-98.4
Other Bulk Commodities.....	1.0	0.7	0.4	0.3	0.4	0.3	0.2	-27.6
Intermediate Total	96.0	152.2*	69.1	60.6	74.0	42.2	56.1	33.0
Milled Grains & Products.....	1.0	0.5	1.0	0.4	1.0	0.8	0.4	-49.0
Soybean Meal.....	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Soybean Oil.....	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Vegetable Oils (excl. soybean).....	3.0	15.0	7.5	5.5	3.4	1.8	0.7	-62.7
Animal Fats.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Live Animals.....	0.0	0.5	0.3	1.2	0.2	0.0	0.3	-
Hides & Skins.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Hay.....	0.0	0.0	0.0	0.0	0.0*	0.0	0.0	-
Distillers Grains.....	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Other Feeds, Meals & Fodders.....	21.0	67.3*	10.6	11.4	11.5	7.1	6.9	-2.2
Ethanol (non-bio).....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-29.8
Planting Seeds.....	19.0	18.5	12.2	12.6	18.6	10.6	24.9	134.2
Sugar, Sweeteners, Bev. Bases.....	2.0	2.8	1.5	0.6	1.1	0.9	0.4	-51.6
Dextrins, Peptones, & Proteins.....	20.0	17.4	15.5	9.7	18.3	8.5	9.9	16.1
Essential Oils.....	18.0	17.5	9.7	10.2	11.0	5.9	6.7	12.6
Other Intermediate Products.....	11.0	12.7	10.7	8.9	8.8	6.5	5.9	-9.7
Consumer Oriented Total	178.0	185.1	165.1	119.3	118.2	54.7	86.6	58.4
Beef & Beef Products.....	14.0	10.7	15.2*	5.9	1.5	0.7	3.5	387.5
Pork & Pork Products.....	0.0	0.2	0.7	0.6	0.4	0.2	0.7	194.8
Poultry Meat & Prods. (excl. eggs).....	68.0	57.5	47.9	26.5	10.7	2.8	14.1	405.4
Meat Products NESOI.....	1.0	0.1	0.1	0.3	0.1	0.0	0.0	-9.3
Eggs & Products.....	1.0	0.7	0.0	0.5	0.7	0.3	0.8	185.2
Dairy Products.....	17.0	21.4	10.5	9.0	16.1	8.1	18.5	128.0
Fresh Fruit.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Processed Fruit.....	2.0	2.2	3.0*	2.2	1.9	0.9	2.3	166.8
Fresh Vegetables.....	0.0	0.2	0.0	0.0	0.2	0.1	0.2	102.4
Processed Vegetables.....	2.0	1.9	1.4	1.2	2.5	1.3	0.7	-43.6
Fruit & Vegetable Juices.....	1.0	3.0	4.9*	3.3	2.7	1.6	1.5	-7.0
Tree Nuts.....	19.0	33.2*	19.4	21.6	20.1	13.0	14.1	8.7
Confectionery.....	1.0	1.4	2.3*	1.3	1.2	0.7	0.6	-4.8
Chocolate & Cocoa Products.....	3.0	3.6	4.5*	2.3	1.8	1.2	1.4	23.9
Bakery Goods, Cereals, & Pasta.....	1.0	1.7	1.3	1.1	0.8	0.5	0.6	17.9
Food Preparations.....	16.0	14.0	13.9	13.9	14.1	7.7	9.2	20.0
Condiments & Sauces.....	8.0	9.4*	6.2	7.0	6.9	3.6	3.1	-13.6
Non-Alcoholic Bev. (excl. juice).....	5.0	4.0	8.4	3.5	3.2	1.9	2.3	21.9
Beer.....	0.0	0.1	0.0	0.0	0.0	0.0	0.0	-
Wine & Related Products.....	0.0	0.3	0.5	0.8	13.9*	0.8	0.8	+1.2
Distilled Spirits.....	15.0	17.0	21.7	15.3	15.8	7.3	9.9	35.3
Nursery Products & Cut Flowers.....	0.0	0.0	0.0	0.0	0.0	0.0	0.1	-
Dog & Cat Food.....	1.0	1.4	1.6	1.0	1.9	0.9	1.1	16.8
Other Consumer Oriented.....	3.0	1.2	1.7	1.8	1.6	1.0	0.8	-22.9
Agricultural Related Products	17.0	16.6	17.0	20.1	18.8	9.5	15.8	66.7
Forest Products.....	13.0	14.4	14.7	16.8	14.6	7.9	11.6	46.7
Seafood Products.....	4.0	2.2	2.3	3.3	4.3	1.6	4.2	167.4
Agricultural Products	316.0	361.5	255.7	184.8	351.2	209.8	147.1	-29.9
Agricultural & Related Products	333.0	378.1	272.8	204.9	370.0	219.3	162.9	-25.7

Prepared By: Trade & Economic Analysis Division/GMA/FAS/USDA

Source: U.S. Census Bureau Trade Data

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.

* Denote Highest Export Levels Since at
Least FY 1970

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Attachments:

No Attachments