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Background Paper Series



Background Paper 2009:2

Trade trends from 2000 to 2008 for agriculture, forestry and fisheries of the Western Cape

***Elsenburg
November 2009***



Overview

The Provincial Decision-Making Enabling (PROVIDE) Project aims to facilitate policy design by supplying policymakers with provincial and national level quantitative policy information. The project entails the development of a series of databases (in the format of Social Accounting Matrices) for use in Computable General Equilibrium models.

The National and Provincial Departments of Agriculture are the stakeholders and funders of the PROVIDE Project. The research team is located at Elsenburg in the Western Cape.

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Trade trends from 2000 to 2008 for agriculture, forestry and fisheries of the Western Cape ¹

Abstract

This paper aims to identify trade trends for primary products from the Western Cape agricultural, forestry and fisheries sector for the period 2000 until 2008. Annual trade data was received from the South African Revenue Service (SARS). The postal code information were used to identify from which province exports were sent or for which province the imports were destined. The postal code provided is that of the exporter or importer, and thus does not reflect the final destination in South Africa of imports or the origin (province) of our exports. Traded goods are classified using the Harmonised System (HS) that is used internationally. Results indicate that in South Africa and the Western Cape, the value of total imports are more than total exports, but in the agricultural sector of both South Africa and the Western Cape exports still dominate, i.e. South Africa and the Western Cape are still net exporters of agricultural products. For the Western Cape horticultural products, especially fruits, are at the top of the list of agricultural exports. The two main export countries for horticultural products are the Netherlands and the United Kingdom. Agricultural imports to the Western Cape are mostly field crops such as wheat, rice and tobacco, mainly from Argentina, Thailand and the United States of America. The values of exports and imports of fisheries and forestry from 2000 to 2008 indicate that the value of fish trade varies over time and the main trading partners also changes notable every year. The value of forestry trade is more stable than fish trade and since 2004, the main export country was Vietnam, but the United States dominates for imports. Nominal values are reported.

¹ The main authors of this paper are Elné Jacobs and Cecilia Punt, Western Cape Department of Agriculture.

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1. Introduction

The rapid reintegration of South Africa into the global economy after 1994 resulted in rising imports and exports as a percentage of Gross Domestic Product (GDP). The South African economy became more open and outward orientated, due to the reintegration as well as global trade liberalisation (Flatters and Stern, 2007). Agriculture in South Africa has also evolved into a global competitive market, with South Africa being in the top five exporters of grapefruit, avocados, plums, tangerines, pears, table grapes and ostrich products. It also is a basis for intra-Africa trade due to the developed agricultural sector compared to other agricultural sectors in Africa (Daya, Ranoto and Letsoalo, 2006).

The South African agricultural sector can be divided into two divisions namely, the well-developed commercial farming sector and the subsistence-based production of households in rural areas. The most restrictive aspect in agriculture is the availability of water. Rainfall is scattered across South Africa and thus distribution is uneven. Agriculture uses almost 50% of water in South Africa, mainly for irrigated land (South Africa Info, 2009). Between 2007 and 2008, agricultural exports increased by 51% whereas agricultural imports increased by 31% (Verster and Steenkamp, 2009). This is not due to sizeable increases in volume, but rather increased prices on certain products such as fruits and nuts. From 2007 to 2008, the value of fruits and nuts exports from South Africa increased by 26.7% whilst there was only a 3.7% increase in the volume of exports in fruits and nuts.

The Western Cape agricultural sector contributed 4.6% to the provincial economy in 2007 (Statistics South Africa, 2009a). Deciduous fruit is the main industry in the Western Cape agricultural sector. The wine industry is particularly dominant in the Western Cape, but for purposes of this report wine is not classified as a primary agricultural product and therefore not included as part of agriculture, although reference is made to it because of its importance and close relationship with the agricultural industry. Agricultural export is a cornerstone in the economy of the province with a share of between 16% and 23% of total exports.

This paper aims to identify trade trends for the Western Cape agricultural, forestry and fisheries sector for the period 2000 until 2008, focusing on primary products and not processed products. The study was partly motivated by media statements in 2007 claiming that South Africa became a net importer of agricultural and food products, and therefore aims to confirm whether or not this is true for the Western Cape as well. The paper is

organised as follows. Section 2 gives a brief description of the data whilst Section 3 provides an explanation on the categorisation used in the paper. Section 4 presents the total and top five imports and exports for South Africa and the Western Cape, as well as for the national and Western Cape agricultural sectors. The top five import and export countries for all products and for agricultural products respectively are also reported on national and provincial level. Section 5 focuses on the top three import and exports of the Western Cape agricultural sector in 2008, and traces it back to 2000. Section 6 reports the top three import and exports of the Western Cape forestry and fisheries sectors in 2008, and traces it back to 2000. It also looks at the import/export country of these products. Section 7 gives an overview of the Western Cape agricultural, forestry and fisheries trade situation in 2008 by focusing on six sub categories of products. Section 8 will give concluding remarks.

The data has not been adjusted for consumer price index (CPI) and thus the reader needs to be attentive when comparing values over time. The time series only shows nominal values and not real values.

2. Description of trade data

The South African Revenue Service (SARS) captures trade data on a monthly basis. Annual data from 2000 to 2008 were obtained (SARS, 2009a). This data is separated in two files namely one file for imports and another for exports. Each row of data includes a postal code. The South Africa Post Office list of postal codes (Post Office, 2004) was used to identify from which province exports were sent or for which province the imports were destined by mapping each postal code to provinces. **The postal code provided is that of the importer or exporter, and thus does not reflect the final destination in South Africa of imports or the original (province) for exports, i.e. no information is available about the producer or final user in South Africa.** In some instances it is clear that the Western Cape is exporting products which it does not produce in sufficient quantities to match the exports. In such cases the Western Cape based exporters could be acting as agents for producers in other provinces, or traders could buy the goods and export it for their own account. Although the data does not allow for a distinction, it is an important one, because it would determine whether the foreign earnings will remain in the Western Cape or whether it will go to the province of the producer.

Traded goods are classified using the Harmonised System (HS) that is used internationally. The datasets are received in unlimited ASCII format with the postal code (4 digits), country of origin or destination (2 digits), HS code (9 digits), quantity imported or exported (15 digits), and custom's value (15 digits) in the fixed width file. Layouts can change slightly for different

years, so researchers need to be careful when extracting the data for consistency. Data from SARS were extracted and aggregated using GAMS software. For more information on the method and statistical programme used to extract the data for analysis, see Provide Technical Paper 2004:2 (PROVIDE, 2004). Appendix A provides some key statistics and characteristics of the datasets for the years 2000 until 2008.

3. Categorisation of data

In order to get valuable and realistic results the data need to be categorised. Classifying both the postal codes as well as the HS codes into groups makes analysis easier. Postal codes were aggregated into the nine provinces and for South Africa as a whole. HS codes were aggregated according to the 23 SARS sections (SARS, 2009b). Table 1 gives a breakdown of the 23 sections and their respective descriptions.

Table 1: Classification of HS codes into 23 sections according to SARS

Section	Chapter (HS 2-digit)	Description
I	1 to 5	Live animals, animal products.
II	6 to 14	Vegetable products.
III	15	Animal or vegetable fats and oils and their cleavage products; prepared edible fats; animal or vegetable waxes.
IV	16 to 24	Prepared foodstuffs, beverages, spirits, and vinegar; tobacco and manufactured tobacco substitutes.
V	25 to 27	Mineral products.
VI	28 to 38	Products of the chemicals or allied industries.
VII	39 to 40	Plastics and articles thereof; rubber and articles thereof.
VIII	41 to 43	Raw hides and skins, leather, fur skins and articles thereof; saddler and harness, travel articles, handbags and similar containers; articles of animal gut (other than silkworm-gut).
IX	44 to 46	Wood and articles of wood, wood charcoal, cork and articles of cork, manufactures of straw, of esparto or of other plaiting material, basket ware and wickerwork.
X	47 to 49	Pulp of wood or of other fibrous cellulosic material; waste and scrap of paper or of paperboard; paper and paperboard and articles thereof.
XI	50 to 63	Textiles and textile articles.
XII	64 to 67	Footwear, headgear, umbrellas, sun umbrellas, walking-sticks, seat-sticks, whips, riding-crops and parts thereof; prepared feathers and articles made therewith, artificial flowers, articles of human hair.
XIII	68 to 70	Articles of stone, plaster, cement, asbestos, mica or similar materials, ceramic products, glass and glassware.
XIV	71	Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal and articles thereof; imitation jewelry, coins.

Section	Chapter (HS 2-digit)	Description
XV	72 to 83	Base metals and articles of base metal.
XVI	84 to 85	Machinery and mechanical appliances, electrical equipment; parts thereof, sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles.
XVII	86 to 89	Vehicles, aircraft, vessels and associated transport equipment.
XVIII	90 to 92	Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus, clocks and watches, musical instruments; parts and accessories thereof.
XX	94 to 96	Miscellaneous manufactured articles.
XXI	97	Works of art, collectors' pieces and antiques.
XXII	-	Other unclassified goods.
XXIII	98	Special classification provisions: Original Equipment Components

Source: SARS (2009b)

The 23 section aggregation mentioned above was used in the first half of the analysis discussed in Sections 4 and 5. For analysis on only agricultural products in Section 6, agricultural products were defined according to the Standard Industrial Classification (SIC) codes (CSS, 1993). The HS codes are first mapped to the SIC codes. Although the SIC codes pertain to industries and HS codes classify commodities, the commodity accounts follow the SIC codes based on the assumption of principal product production by each industry classified according to SIC. The agricultural categories according to the SIC includes²: growing of crops/horticulture; farming with animals; growing of crops and farming with animals; animal husbandry; hunting, trapping and game propagation; production of organic fertilizer; forestry; logging; ocean and coastal fishing; and fish hatcheries and farms. With reference to the 23 SARS chapters above, the entire first chapter relates to agricultural products, but agricultural products are also found in parts of the second, third, fourth, eighth and ninth chapters.

As a second stage each of the SIC codes are mapped to the desired commodity group. Detailed agricultural analysis is done on a 4-digit level, but all the 4-digit level products were divided into six groups (according to classifications used in the 2007 Agricultural Census (Statistics SA, 2009b)) to facilitate the discussion. See Appendix B for a listing of the six groups and product groups according to the 2-digit HS level and the 4-digit HS level.

² The SIC codes for agriculture include: 1110, 1120, 1130, 1140, 1150, 1160, 1210, 1220, 1310, 1320.

4. Comparing trade in South Africa and the Western Cape

Imports and export values for South Africa and the Western Cape are compared in Table 2. In South Africa as well as the Western Cape, total imports exceed total exports, but for both the agricultural sectors on national and provincial level the value of exports exceed the value of imports. In 2008 45% of South Africa's agricultural products in value terms were exported by Western Cape based exporters. It must be noted that this does not imply that all of these products were produced in the Western Cape. Fisheries exports comprised 70% of the national total, whereas forestry comprised on 3% of the national total. From Table 2 it can also be calculated that agriculture, forestry and fisheries imports (exports) in the Western Cape account for 1.8% (17.6%) of total Western Cape imports (exports).

Table 2 also reports wine imports and exports, which is not included in the figures for primary agriculture. According to the Standard Industrial Classification (CSS, 1993) wine produced in cellars at the same location of wine grape production is deemed primary production, whereas all other wine production is classified as processed or manufactured goods. The trade data does not however allow for distinction in this regard. For purposes of this report wine is included in Table 2 and referred to in the context of Table 8, but otherwise omitted from the discussion and results for agriculture. 63% of South Africa's wine imports are imported to the Western Cape and 98% of South Africa's wine exports are exported from the Western Cape. Total wine exports in 2008 amounted R6 272 million. Wine is produced predominantly in the Western Cape, but also in the Northern Cape.

Table 2: Total imports and exports for South Africa and the Western Cape (2008)

	Imports (R million)	Share of SA imports	Exports (R million)	Share of SA exports
South Africa total	813 292.6		811 730.4	
South Africa agriculture, forestry, fisheries	16 401.6		31 809.8	
Agriculture	14 465.7		27 832.0	
Forestry	1 621.8		2 353.5	
Fishery	314.1		1 624.3	
South African Wine	196.6		6 272.5	
Western Cape total	174 303.8	21%	78 148.8	10%
Western Cape agriculture, forestry, fisheries	3 218.3	20%	13 717.7	43%
Agriculture	2 927.4	20%	12 518.4	45%
Forestry	75.1	5%	63.6	3%
Fishery	215.8	69%	1 135.7	70%
Western Cape Wine	124.0	63%	6 150.7	98%

Source: Own calculations from SARS data (2008)

The top five imports and exports for South Africa according to the 23 SARS sections are reported in Table 3. The top import section is that of machinery and mechanical appliances of which cell phones imports are notable, whilst the top export section is pearls, precious stones and metals which is largely accounted for by gold exports. The second highest is mineral products (petroleum oil) and base metals for imports and exports respectively. The top five imports (exports) represent 69.8% (78.7%) of the value of total imports (exports) for South Africa.

Table 3: Top five imports and exports for South Africa (23 chapters) (2008)

Imports		Exports	
Product	Value (R million)	Product	Value (R million)
Machinery and mechanical appliances especially telephones for cellular networks	186 954.6	Natural or cultured pearls etc especially gold in semi-manufactured form	203 524.2
Mineral Products especially petroleum oil	180 076.1	Base metals etc.	138 034.3
Vehicles, aircraft etc especially vehicles for transport of people	75 233.8	Mineral Products especially coal	136 778.3
Products of the chemicals or allied industries	66 065.3	Vehicles, aircraft etc especially vehicles for transport of people	85 204.9
Natural or cultured pearls etc especially gold in unwrought form	59 110.3	Machinery and mechanical appliances especially filtering and purifying machinery	74 983.1

Source: Own calculations from SARS data (2008)

Table 4 shows the top five import and export countries for South Africa in 2008, when taking all products into consideration. Germany is the country from which South Africa imports the highest value, representing 10.29% of total South African imports. South Africa exports the largest value to the United Kingdom, representing 10.33% of total South African exports. China is a close second with regard to imports and the United States for exports. The top five import countries represent 39.03% of South African imports, while the top five export countries represent 41.57% of exports.

Table 4: Top five import and export countries for South Africa – all products (2008)

Imports		Exports	
Country	Value (R million)	Country	Value (R million)
Germany	83 709.03	United Kingdom	83 835.33
China	83 641.18	United States	71 466.9
United States	60 260.21	Japan	67 778.98
Saudi Arabia	45 956.24	Germany	57 840.14
United Kingdom	43 898.17	India	56 479.32

Source: Own calculations from SARS data (2008)

Table 5 shows the top five import and export countries for South African agricultural, forestry and fisheries products in 2008. Thailand is the country from which South Africa imports the highest value of agricultural, forestry and fisheries products, representing 19.26% of South African agricultural, forestry and fisheries imports. South Africa exports the largest value to the Netherlands, representing 15.60% of total South African agricultural, forestry and fisheries exports. Argentina is second with regard to imports and Japan for exports. The top five import countries represent 55.42% of South African agricultural, forestry and fisheries imports, while the top five export countries represent 44.08% of agricultural, forestry and fisheries exports.

Table 5: Top five import and export countries for South Africa – agricultural, forestry and fisheries products (2008)

Imports		Exports	
Country	Value (R million)	Country	Value (R million)
Thailand	3 140.37	Netherlands	4 962.06
Argentina	2 069.16	Japan	2 787.31
Zimbabwe	1 407.82	United Kingdom	2 776.59
United States	1 230.91	Zimbabwe	2 264.22
Malawi	1 185.29	China	1 232.93

Source: Own calculations from SARS data (2008)

The top five imports and exports of the Western Cape are shown in Table 6 and it indicates that the biggest import is mineral products (crude oil) while the leading export is chemical products (especially graphite). Second largest export is that of mineral products, which is irregular, due to the fact that the Western Cape does not have mineral mining activities that will result in such a large export value. These exports can be from the Northern Cape which is exported through the Western Cape harbour and hence the exporter is based in the Western Cape³. The top five imports (exports) represent 86.1% (76.4%) of the value of total imports (exports) for the Western Cape.

³ See Description of trade data

Table 6: Top five imports and exports of the Western Cape (23 chapters) (2008)

Imports		Exports	
Product	Value (R million)	Product	Value (R million)
Mineral Products especially crude petroleum oils	118 757.3	Products of the chemicals or allied industries especially graphite	15 462.5
Machinery and mechanical appliances especially Photosensitive semiconductor devices	12 734.1	Mineral Products especially petroleum oils (not crude)	14 079.3
Prepared foodstuffs especially beer and spirits	7 017.3	Vegetable products	12 366.1
Products of the chemicals or allied industries especially medicine	6 343.4	Prepared foodstuffs especially wine	10 659.6
Textiles and textile articles	5 262.5	Machinery and mechanical appliances especially Filtering and purifying machinery for gases	7 109.3

Source: Own calculations from SARS data (2008)

In Table 7 the top five countries from (to) which the Western Cape imports (exports) are shown. Saudi Arabia is the country from which the highest value of imports come (15.25% of total Western Cape imports), followed by Angola (11.42%). The imports from Saudi Arabia however comprise 96.3% crude-oil and it represents 57.9% of imports from Saudi Arabia into South Africa. The highest value of exports from the Western Cape goes to India (11.85% of total Western Cape exports), followed by the Netherlands (8.99%). The top five import countries represent 51.27% of Western Cape imports, while the top five export countries represent 39.69% of exports.

Table 7: Top five import and export countries for the Western Cape – all products (2008)

Imports		Exports	
Country	Value (R million)	Country	Value (R million)
Saudi Arabia	26 587.31	India	9 262.765
Angola	19 911.74	Netherlands	7 024.346
Iran	19 347.22	United Kingdom	6 671.698
China	12 892.48	Country Unknown (ZN)	4 037.631
Yemen	10 620.3	Germany	4 023.004

Source: Own calculations from SARS data (2008)

In Table 8 the top five countries from (to) which the Western Cape import (export) agricultural, forestry and fisheries products are shown. Argentina is the country from which the highest value of agricultural, forestry and fisheries imports come (19.11% of Western Cape agricultural, forestry and fisheries imports), followed by Thailand (14.92%). The highest value of exports from the Western Cape goes to the Netherlands (18.71% of

Western Cape agricultural, forestry and fisheries exports), followed by the United Kingdom (16.40%). The top five import countries represent 57.83% of Western Cape agricultural, forestry and fisheries imports, while the top five export countries represent 49.82% of agricultural, forestry and fisheries exports. Although wine is not included in the classification of primary agriculture, it is deemed an important value adding component of agriculture in the Western Cape, hence some reference to trading partners in wine are also warranted. In 2008 wine to the Western Cape was mostly imported from France (R80.7 million) followed by Australia (R17.9 million). Wine from the Western Cape was mostly exported to the United Kingdom (R1 578.8 million) followed by Germany (R725.2 million).

Table 8: Top five import and export countries for the Western Cape – agricultural, forestry and fisheries products (2008)

Imports		Exports	
Country	Value (R million)	Country	Value (R million)
Argentina	615.16	Netherlands	2 566.82
Thailand	480.03	United Kingdom	2 249.39
United States	270.55	Russian Federation	799.33
Zimbabwe	270.05	Hong Kong	631.04
Brazil	225.23	Germany	586.91

Source: Own calculations from SARS data (2008)

The next two tables make use of the 2-digit level HS codes⁴ relevant to agriculture, forestry and fisheries, but it still excludes detailed codes that pertain to processed food because the aim is to capture primary agricultural, forestry and fisheries products. Table 9 indicates the top five imports and exports for the South African agricultural, forestry and fisheries sector. Grains (especially rice) are the biggest import and nuts and fruits are the biggest export. The top five agriculture, forestry and fisheries imports (exports) on 2-digit level represent 82.4% (79.3%) of the value of total imports (exports) for South Africa.

Table 9: Top five imports and exports for South African agriculture, forestry and fisheries (2 digit HS code) (2008)

Imports		Exports	
Product	Value (R million)	Product	Value (R million)
Grains especially rice	7 681.6	Nuts and fruits	13 431.0
Tobacco, unmanufactured, partly or wholly stemmed and stripped	2 462.9	Grains especially maize	5 072.6
Rubber	1 338.2	Tobacco, unmanufactured, partly or wholly stemmed and stripped	2 700.7
Cotton	1 154.7	Fuel wood and logs	2 269.1
Coffee, tea and spices	870.1	Plants	1 751.0

Source: Own calculations from SARS data (2008)

⁴ See Appendix B for listing of product groups according to the 2-digit HS level and the 4-digit HS level.

The Western Cape agricultural sector imports grains (especially wheat) the most and the principal exports are nuts and fruits (78.70% of total South African nuts and fruits exports). Grains, fish and oilseeds all feature as top imports and exports. The high level of tobacco imports (23.48% of total South African tobacco imports) can be attributed to the financial centre of leading tobacco manufacturers that are based in the Western Cape (British American Tobacco Sustainability Report, 2008). The top five agricultural, forestry and fisheries imports (exports) on 2-digit level represent 88.9% (95.7%) of the value of total imports (exports) for the Western Cape.

Table 10: Top five imports and exports for Western Cape agriculture, forestry and fisheries (2 digit HS code) (2008)

Imports			Exports		
Product	Value (R million)	Share of South Africa (imports)	Product	Value (R million)	Share of South Africa (exports)
Grains especially wheat	1 803.8	23.48%	Nuts and fruits	10 570.1	78.70%
Tobacco	587.5	23.86%	Fish especially seaweeds and other algae	1 129.5	69.88%
Fish especially crustaceans and molluscs	213.9	73.82%	Oil seeds especially seeds for sowing	560.9	40.99%
Oil seeds especially sunflowers seeds	135.3	20.03%	Grains especially maize	453.8	8.95%
Vegetables	119.9	20.05%	Meat products	408.7	84.43%

Source: Own calculations from SARS data (2008)

The above tables indicate that the South African and Western Cape agricultural sectors have a similar trade composition with grains as largest import and fruits and nuts as main export. The top three agricultural imports and exports for 2008 as shown in Table 10 are explored over time in the next section. The top three forestry and fisheries imports and exports for 2008 for the Western Cape are explored over time in Section 6.

5. Western Cape agricultural trade over time

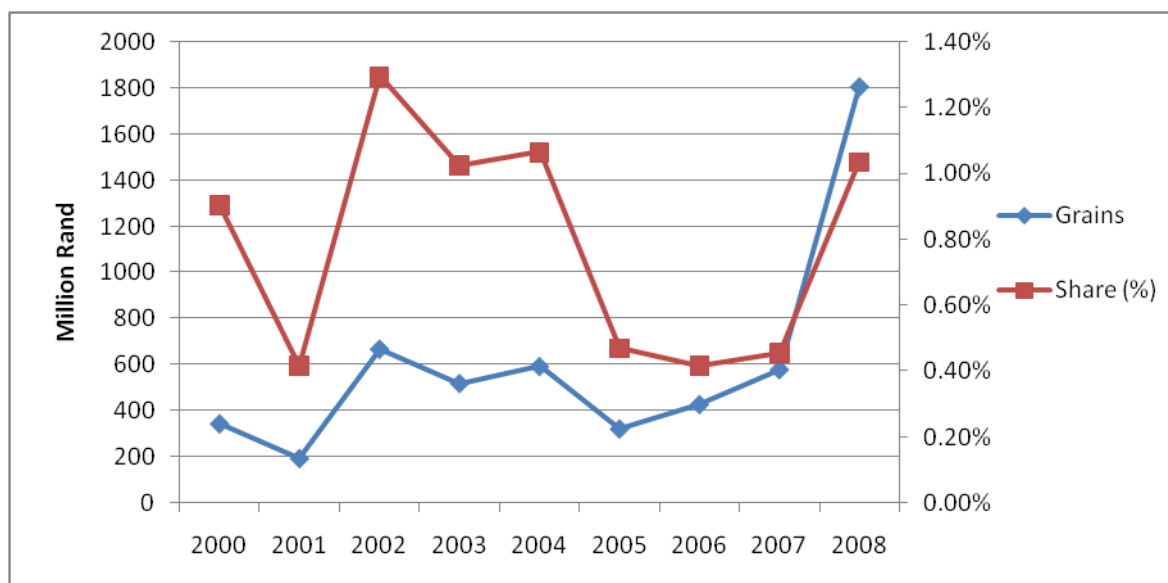
In 2008, the top three agricultural imports of the Western Cape were grains, tobacco and oilseeds and the top three exports were fruits and nuts, oilseeds and grains (according to the 2 digit HS code classification –see appendix B). These six groups are investigated next to determine the trend from 2000 to 2008 and import/export countries for each group are also

examined. This is done in order to establish the import and export market for each group and to see the pattern of imports and exports over time. Only nominal values are reported (the data is not adjusted for CPI), hence the values reflect nominal, not real, increases. Agricultural exports and imports increased heavily from 2007 to 2008, but this was due to increases in prices and not volume and the reader needs to be careful when interpreting the results.

5.1. Imports

In Figure 1, the leading import on 2-digit HS level (based on values) is explored over time. Since 2005, there was a large increase in value of grains imported, of which the most important grain was wheat. There is especially an enormous increase from 2007 to 2008 where the value of imports for grains increased from R577 million to R1.8 billion. The total grains imports as a percentage of total Western Cape imports also differ from year to year ranging from 0.42% minimum in 2001 to 1.3% maximum in 2002.

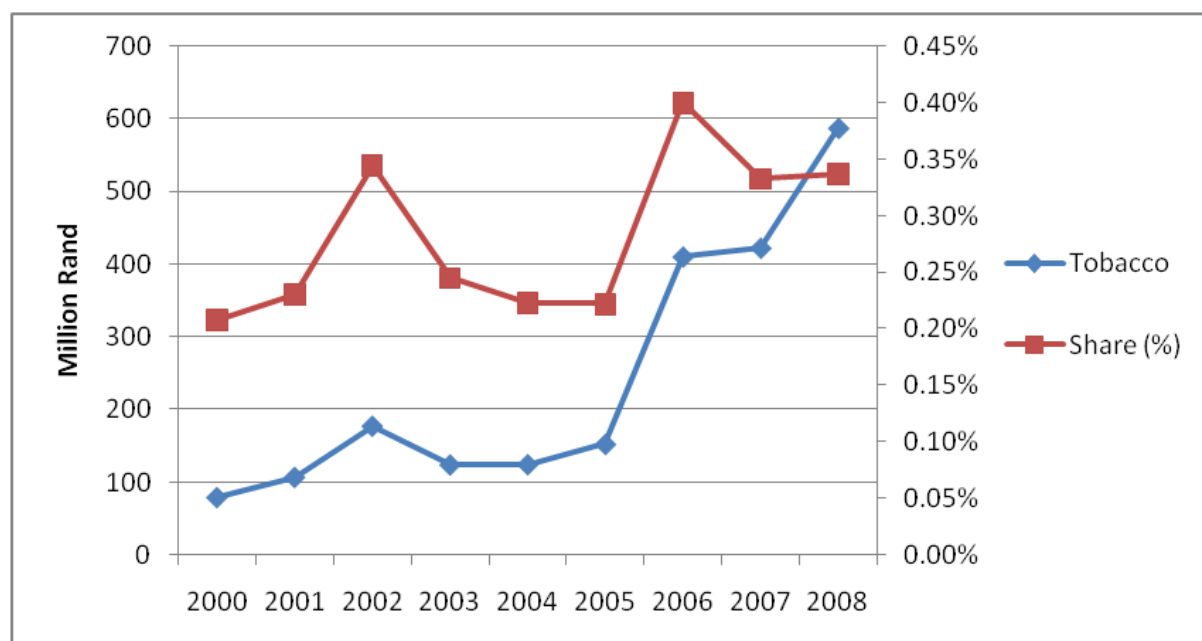
Figure 1: Value of imports of grains over time and its contribution to total Western Cape imports



Source: Own calculations from SARS data (2000 - 2008)

Figure 2 indicates the second largest import for the Western Cape. The value of tobacco imports also increased over time, starting with R78 million in 2000 and ending with R587 million in 2008. Its contribution to the total Western Cape imports increased from 0.21% to 0.34%.

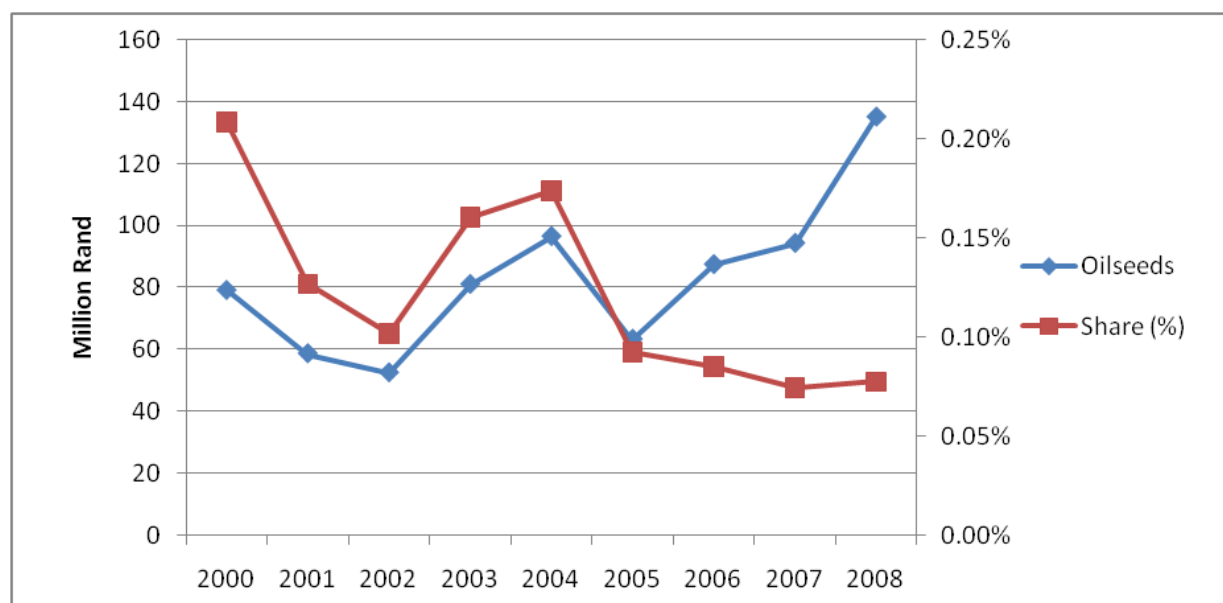
Figure 2: Value of imports of tobacco over time and its contribution to total Western Cape imports



Source: Own calculations from SARS data (2000 - 2008)

The third largest agricultural import on 2-digit HS level, when taking value as measurement, is that of oilseeds. In Figure 3 the imports of oilseeds for the Western Cape over time is reported. Since 2005 the value of imports of oilseeds increased systematically, but the contribution to the total value of Western Cape imports decreased since 2004. In 2008, the value of imports of oilseeds reached a maximum for the period 2000 to 2008.

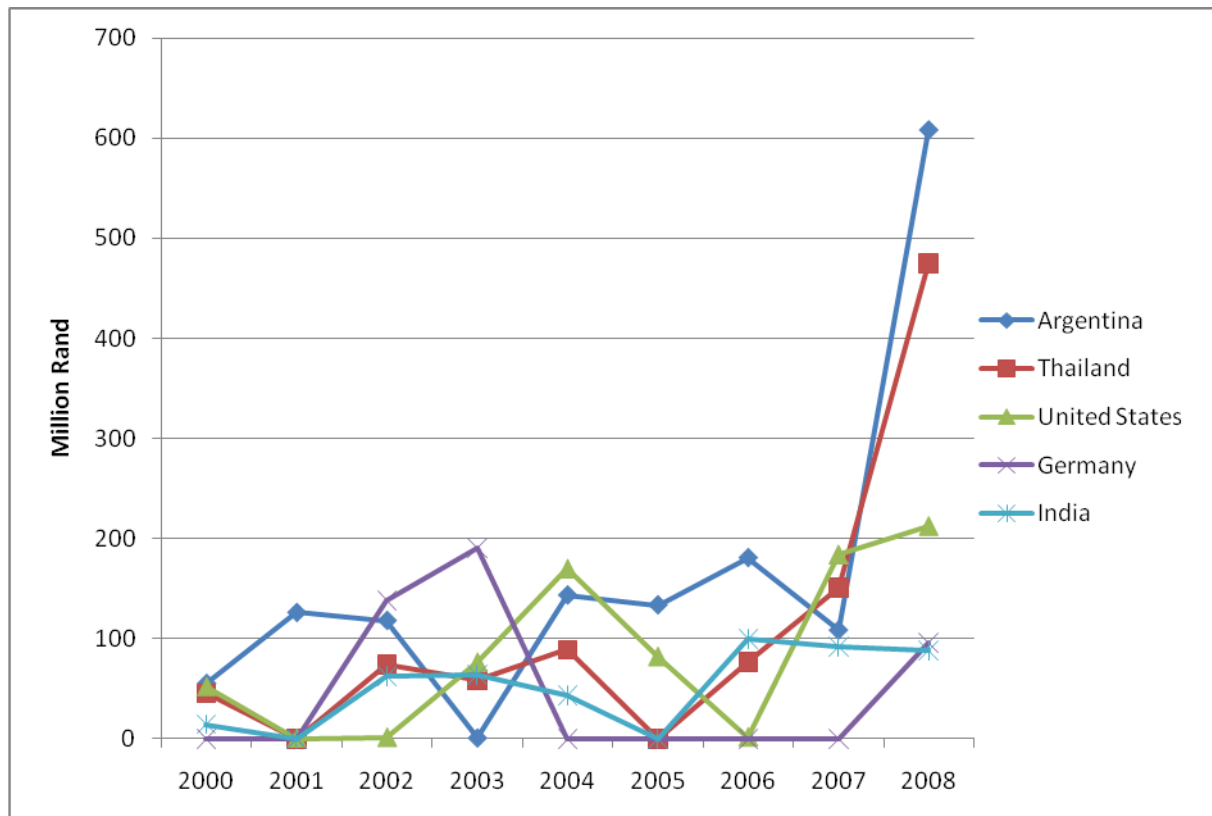
Figure 3: Value of imports of oilseeds over time and its contribution to total Western Cape imports



Source: Own calculations from SARS data (2000 - 2008)

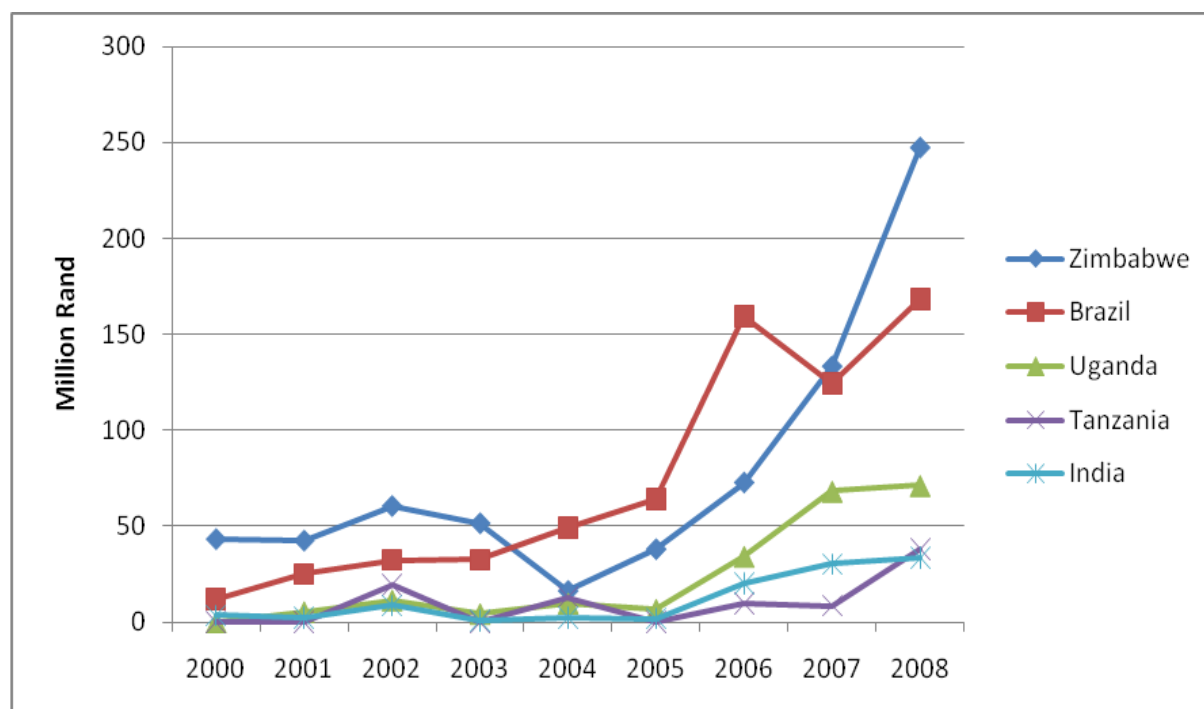
The next three figures look at the import countries for the three products reported in Figures 1 to 3. Firstly, grains are investigated in Figure 4 and the main import country is Argentina in 2008. The data is very irregular with Argentina recording a R0.5 million import in 2003 but a R607 million import in 2008. The second largest import country, Thailand, shows the same irregularities with a value of R1 953 in 2001 and R474 million in 2008.

Figure 4: Value of imports from different countries for grains over time



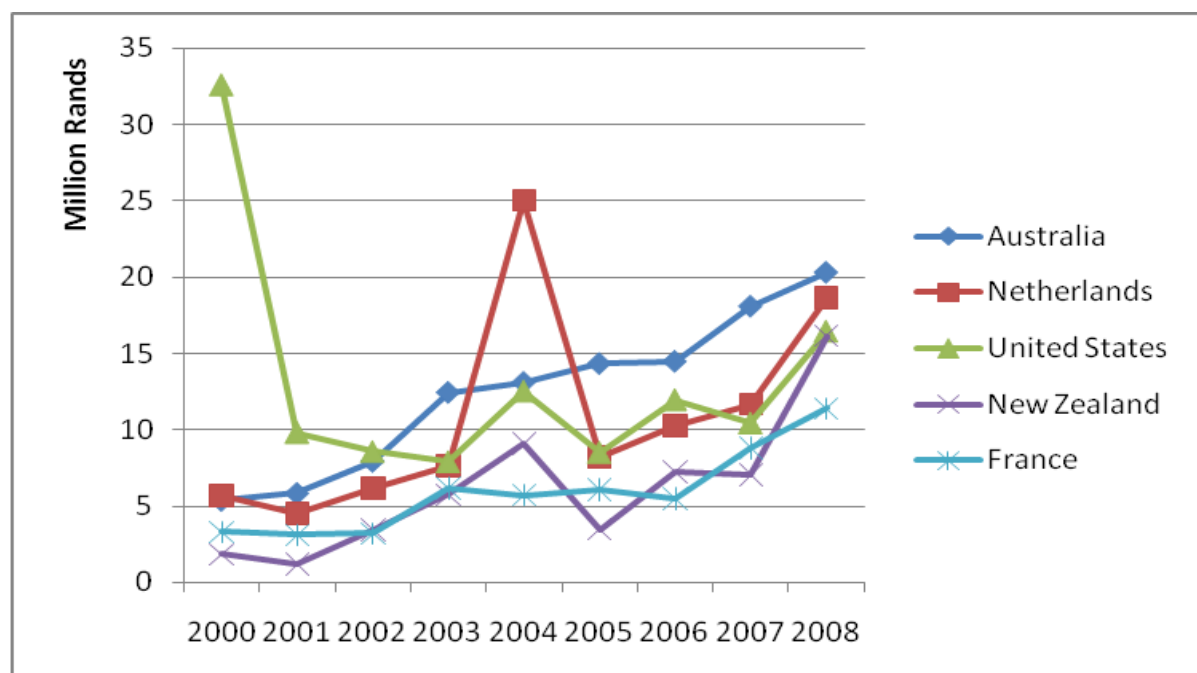
Source: Own calculations from SARS data (2000 - 2008)

In Figure 5, tobacco is explored in terms of import country. Zimbabwe is the country from which the most tobacco is imported to the Western Cape, followed by Brazil. It can be seen in the figure that Brazil and Zimbabwe have been over time the two main suppliers of tobacco, with the two countries changing positions twice during the period (once in 2004 and then again in 2007).

Figure 5: Value of imports from different countries for tobacco over time

Source: Own calculations from SARS data (2000 - 2008)

The next figure indicates oilseed imports over time based on main importing countries during 2008. Australia dominates from 2005 to 2008 as main country wherefrom oilseeds are imported, whilst in 2000 the United States was by a large margin the main import country for oilseeds. Australia, New Zealand and France stayed relatively constant with regard to imports of oilseeds from these countries during the period 2000 to 2008.

Figure 6: Value of imports from different countries for oilseeds over time

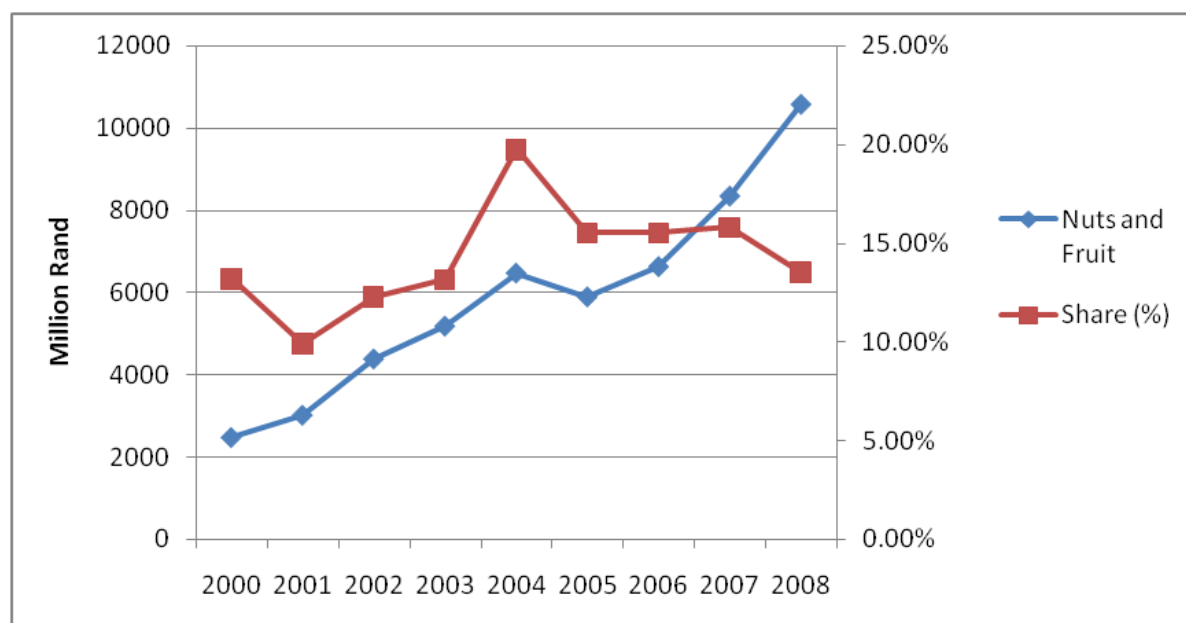
Source: Own calculations from SARS data (2000 - 2008)

Agricultural imports of the Western Cape has increased from R612 million in 2000 to R2.9 billion in 2008, representing 1.61% of value of total Western Cape imports in 2000 and 1.68% in 2008.

5.2. Exports

This section looks at the three most import export group based on the 2-digit HS level. The Western Cape agricultural export industry is mainly based on the exports of fruits such as citrus, apples, pears and table grapes. The trend over time for this group of exports, which falls in the sub category fruits and nuts, is investigated in Figure 7. There has been a strong growth in the value of exports of fruits and nuts over time, with a 400% increase in nominal terms (from R2.4 billion to R10.5 billion). Total exports of fruits and nuts in the Western Cape as percentage of total exports in the Western Cape increased significantly from 2000 to 2004 (from 13.2% to 19.7%) but decreased after that until reaching 13.5% in 2008.

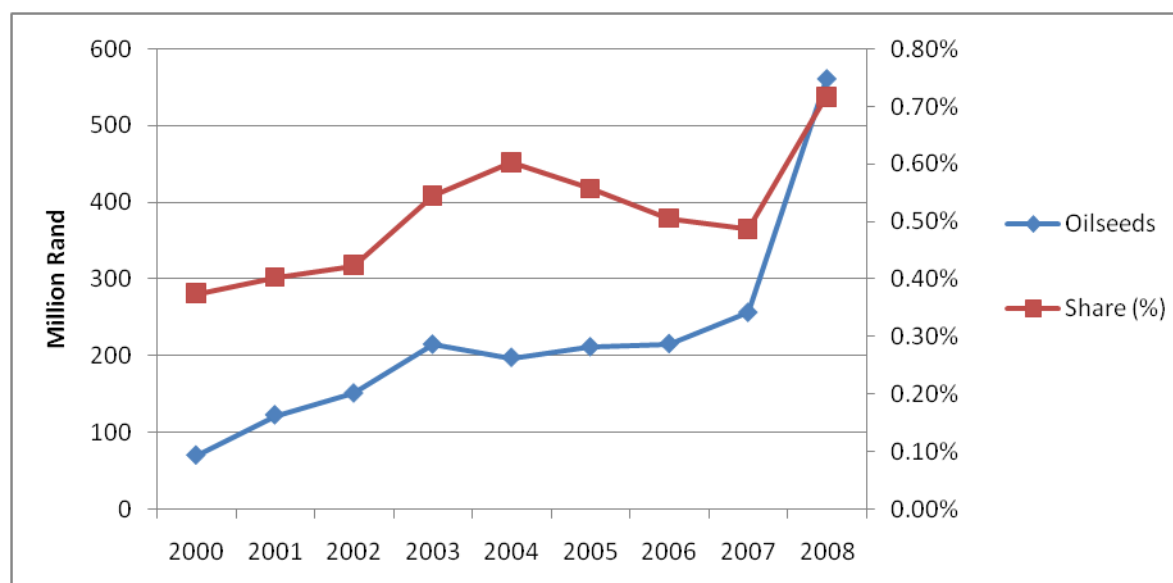
Figure 7: Value of exports of fruits and nuts over time and its contribution to total Western Cape exports



Source: Own calculations from SARS data (2000 - 2008)

The second largest export for the Western Cape agricultural sector on a 2-digit level after fruits and nuts, is that of oilseeds, especially seeds for sowing. In Figure 8 oilseeds are explored, and again like the fruits and nuts sub category, it shows a substantial increase in the value of exports for the Western Cape agricultural sector. An almost 800% increase occurred (from R70 million to R560 million) over the time period 2000 to 2008. The contribution of oilseeds exports to total exports in the Western Cape also increased from 0.37% to 0.72%.

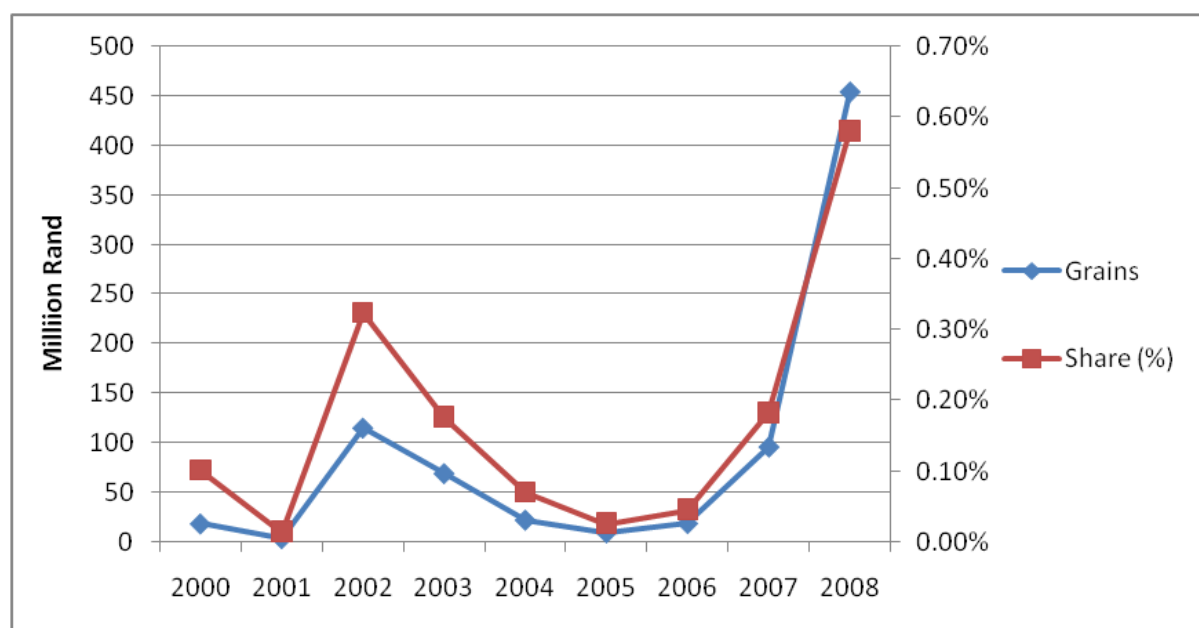
Figure 8: Value of exports of oilseeds over time and its contribution to total Western Cape exports



Source: Own calculations from SARS data (2000 - 2008)

The third largest export for the Western Cape agricultural sector is that of grains. Figure 9 indicates that there was a large upswing in total value of grain exports from the Western Cape since 2006. In 2002, there was also a slight increase in exports. The contribution to the total value of the Western Cape follows the same trend as the value of exports of grains.

Figure 9: Value of exports of grains over time and its contribution to total Western Cape exports

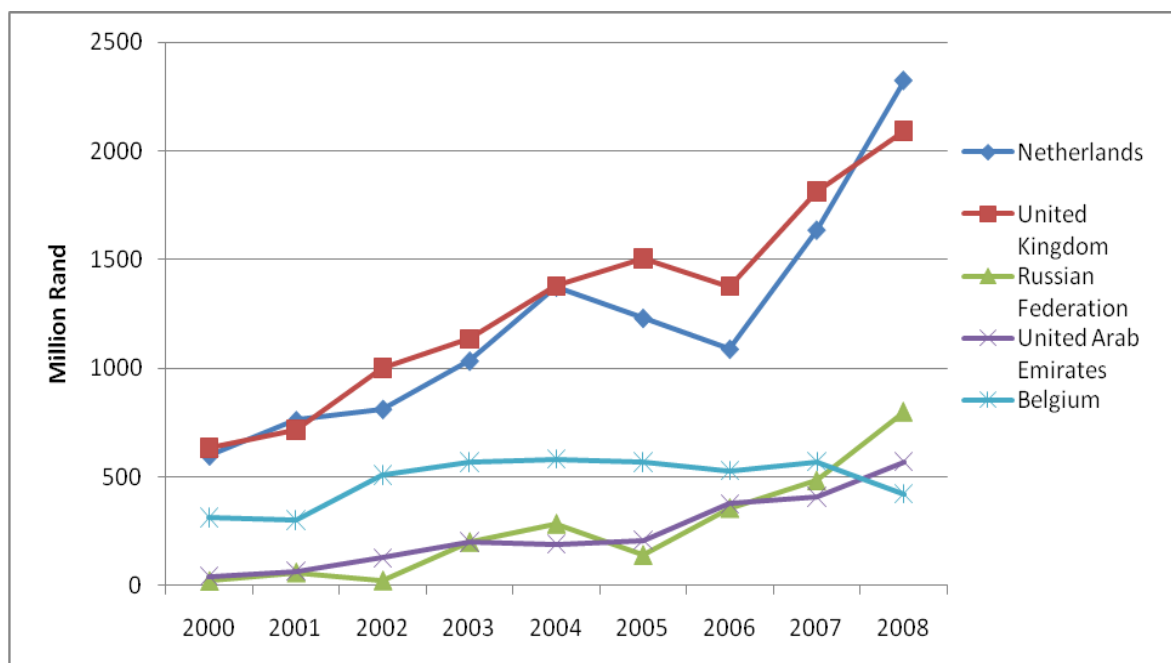


Source: Own calculations from SARS data (2000 - 2008)

The next three figures track the export country of the three main exports of the Western Cape agricultural sector. This was done, as stated earlier, by selecting the top five export countries for a sub category in 2008, and tracking their status since 2000.

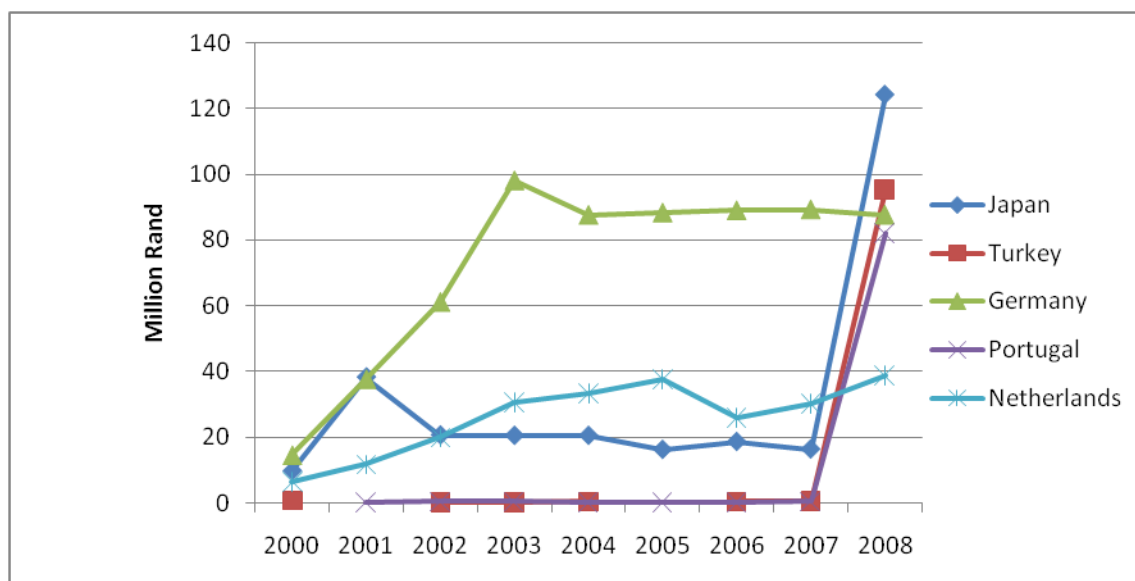
In Figure 10 the export countries of fruits and nuts were tracked and the figure indicates that most exports are going to the Netherlands and the United Kingdom. Only in 2008, the Netherlands took the lead in the value of exports of fruits and nuts, the United Kingdom dominated throughout the period. Belgium decreased to fifth place after being the third popular export country until 2007.

Figure 10: Value of exports to different countries for fruits and nuts over time



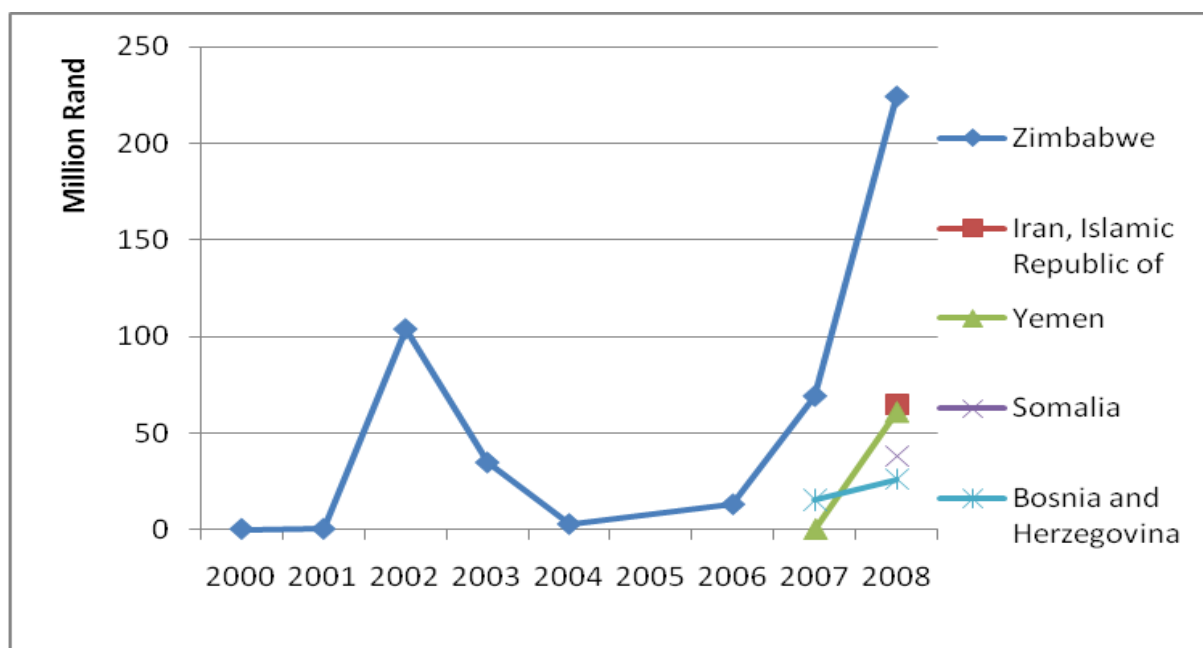
Source: Own calculations from SARS data (2000 - 2008)

The second largest export for the Western Cape agricultural sector in 2008 is oilseeds. Figure 11 explores the export country of this sub category and Germany seems to dominate until 2008 where Japan takes the lead. All the export countries seems to increase substantially in 2008 after a stable export value from 2000 except for Germany that increased in 2003 and then remained stable for the remainder of the period.

Figure 11: Value of exports to different countries for oilseeds over time

Source: Own calculations from SARS data (2000 - 2008)

In Figure 12 the export destinations of grains are investigated. It indicates that of the five top countries in 2008, only Zimbabwe had data values for the export of grains over the time period. It also shows a enormous increase from 2006 to 2008 in the value of exports of grain to Zimbabwe. The other countries that are in the top five countries for value of exports of grains in 2008 does not show any trend except for Bosnia and Herzegovina that has the second highest export value for grains in 2007.

Figure 12: Value of exports to different countries for grain over time

Source: Own calculations from SARS data (2000 - 2008)

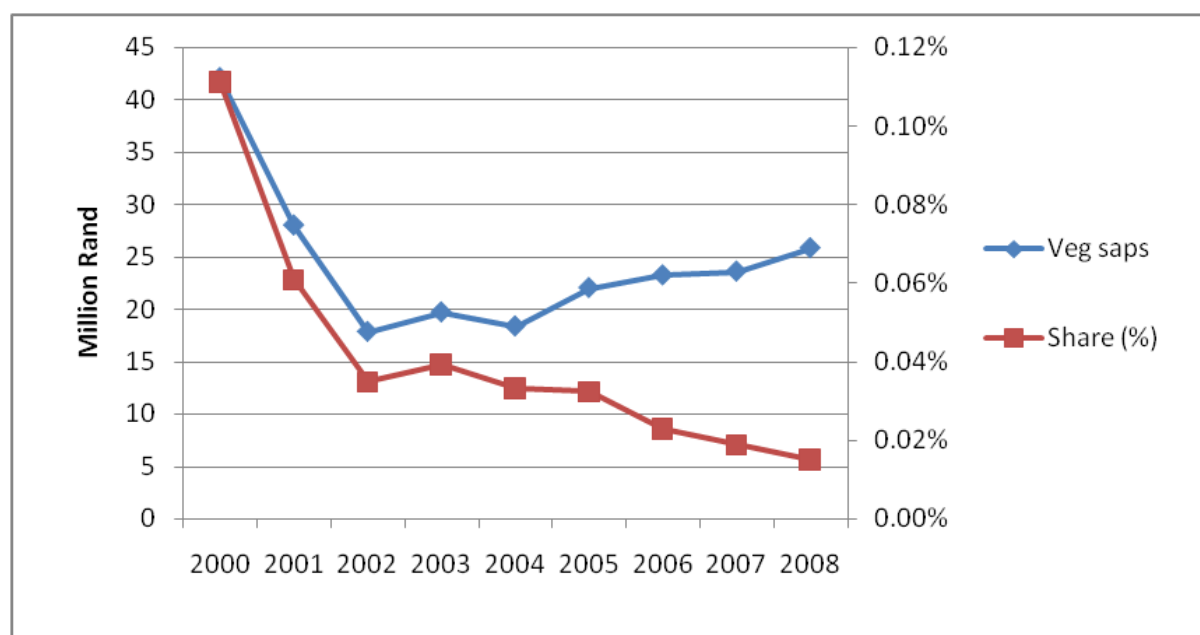
Agricultural exports from the Western Cape have increased from R2.79 billion in 2000 to R12.5 billion in 2008, representing 14.9% of value of total Western Cape exports in 2000 and 16.0% in 2008.

6. Western Cape forestry and fisheries trade over time

6.1. Imports

Figure 13 indicates the largest import in 2008 for the forestry industry on a 2-digit level, which is vegetable saps and extracts. It shows a decrease in value of imports from 2000 to 2002 whereafter a steady increase occurred. The contribution of the value of vegetable saps and extracts to the total value of the Western Cape exports decreased over the time period 2000 to 2008, with a significant decrease from 2000 to 2002 whereafter a more gradual decrease can be seen.

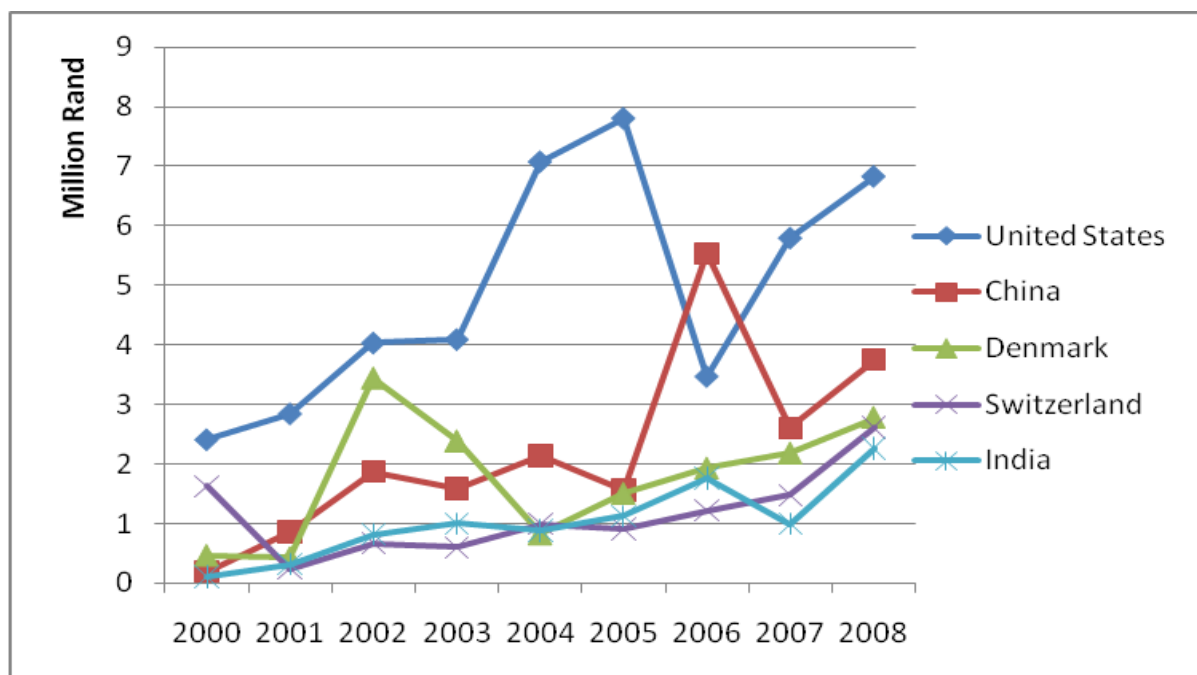
Figure 13: Value of imports of forestry (vegetable saps and extracts) over time and its contribution to total Western Cape imports



Source: Own calculations from SARS data (2000 - 2008)

The countries where vegetable saps and extracts are imported from are investigated in Figure 14. It shows that the United States is the leading country for Western Cape vegetable saps and extract imports when taking value as criterion. Only in 2006 did imports from China exceed imports from the United States. Imports from Switzerland and India stayed stable with regard to value over the time period.

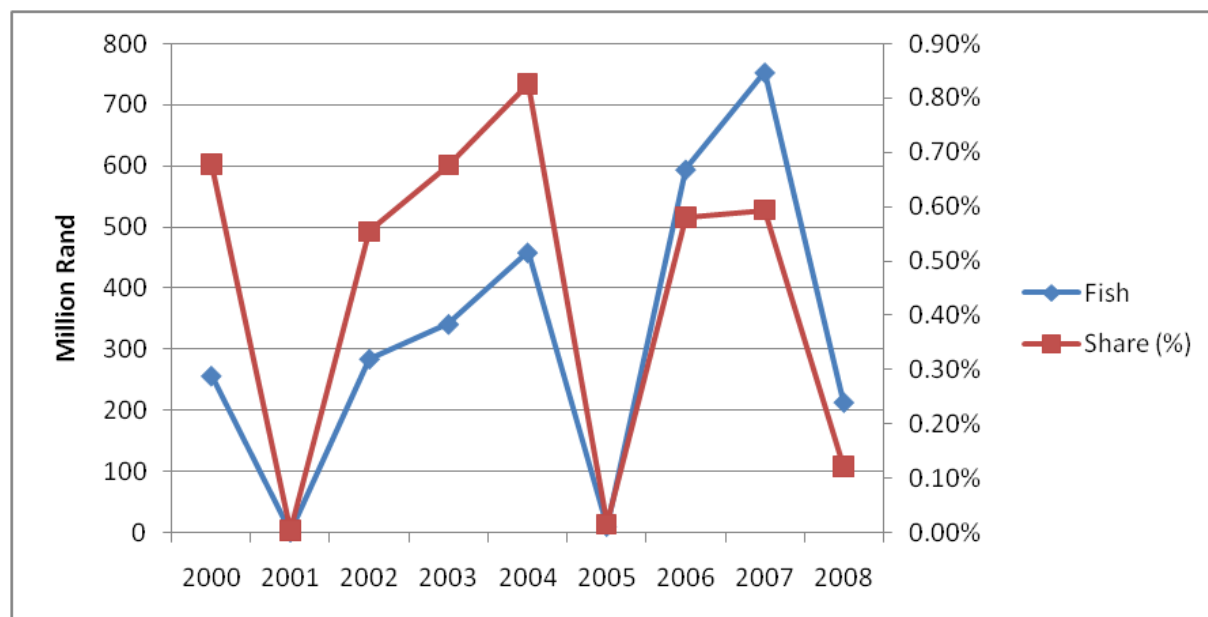
Figure 14: Value of imports from different countries for forestry (vegetable saps and extracts) over time



Source: Own calculations from SARS data (2000 - 2008)

The largest import for fisheries on a 2-digit HS level falls in the category of 'other fish' (as opposed to live fish). Fisheries imports are also the third largest import for the Western Cape agricultural, forestry and fisheries sector as seen in Table 10. In Figure 15 the imports of 'other fish' for the Western Cape over time is reported. As seen in the figure, the trend over time seems irregular with large up/down swings. In 2001 and 2005, extremely low values were obtained (R1 million and R11 million respectively), whereas in 2007 the values peaked at R753 million. The low imports of fisheries products (excluding live fish) in 2001 and 2005 can be attributed to low total imports across South Africa (the totals only between 3 and 7 percentage points of other years' total other fish imports) and an increase of imports to the Gauteng province. Total 'other fish' imports in the Western Cape as a percentage of total imports in the Western Cape is also very volatile and moves in the same direction as the value of imports over time.

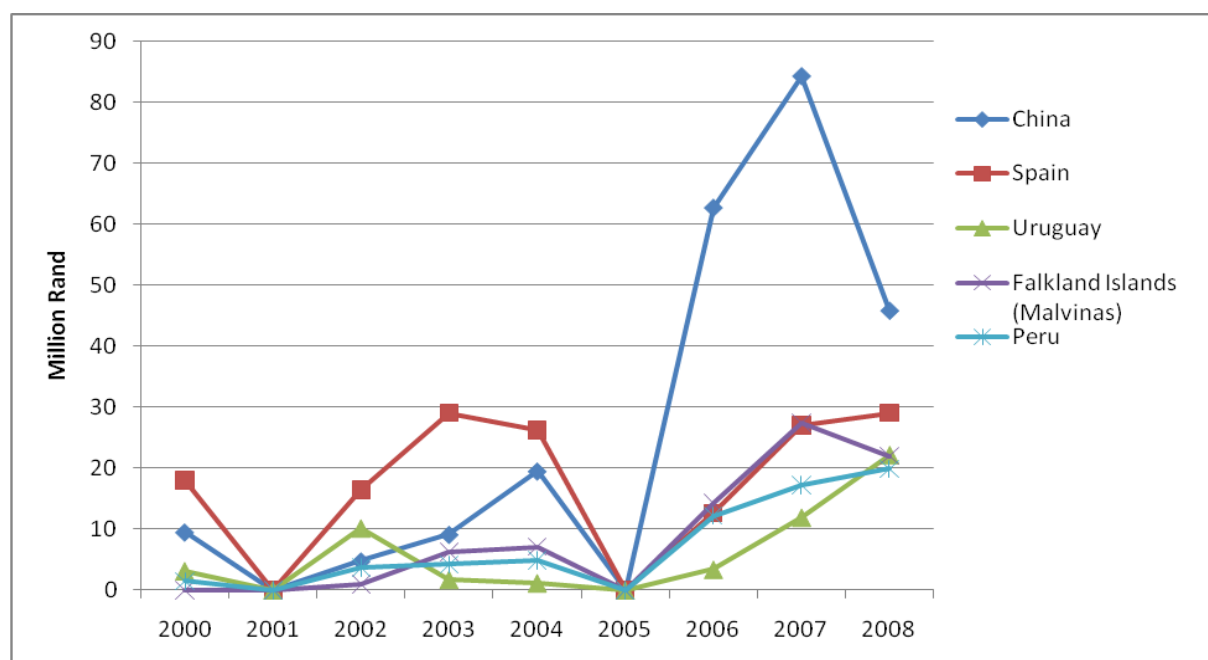
Figure 15: Value of imports of 'other fish' over time and its contribution to total Western Cape imports



Source: Own calculations from SARS data (2000 - 2008)

The next figure indicates fisheries imports (excluding live fish) over time based on main importing countries during 2008. There were no imports recorded for these five main countries during 2001 and 2005. Chile and India were the top import countries for other fisheries products in 2001 and 2005 respectively. The figure indicates that China was the top import country for 'other fish' from 2006, with Spain taking the lead for the period 2000 to 2003. In 2007, there was a surge of imports from China (at a staggering R84 million), but it almost halved in 2008 with imports valued at R45 million.

Figure 16: Value of imports from different countries for 'other fish' over time



Source: Own calculations from SARS data (2000 - 2008)

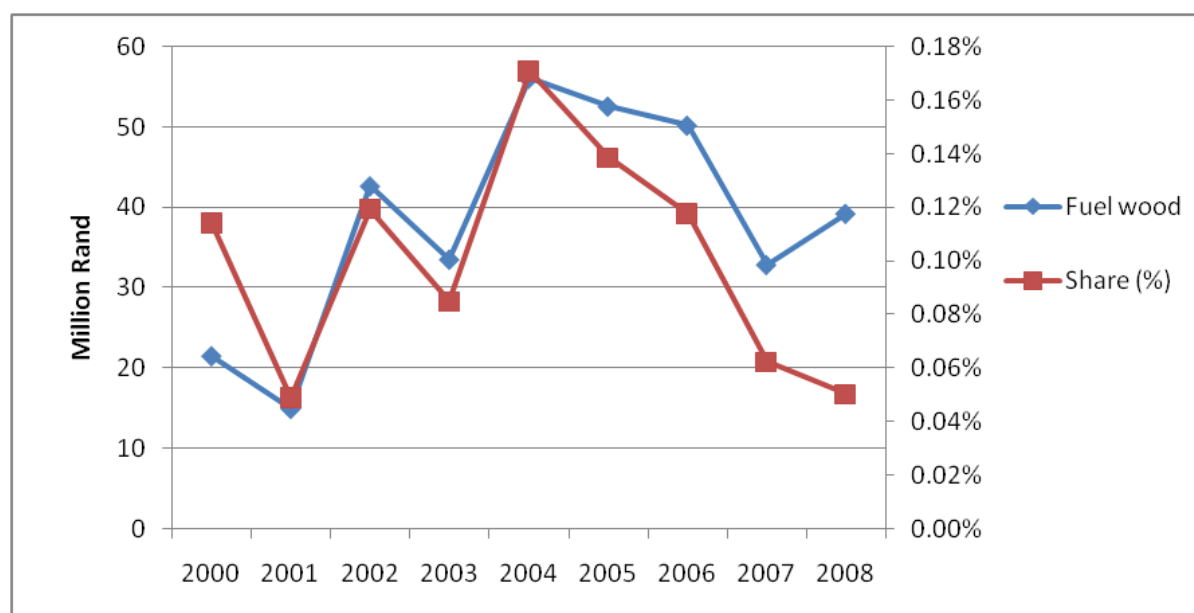
Forestry imports from the Western Cape have increased from R25.4 million in 2000 to R75.1 million in 2008, representing 0.07% of the value of total Western Cape imports in 2000 and 0.04% in 2008.

Fisheries imports from the Western Cape have increased from R163.4 million in 2000 to R215.8 million in 2008, representing 0.43% of the value of total Western Cape imports in 2000 and 0.12% in 2008.

6.2. Exports

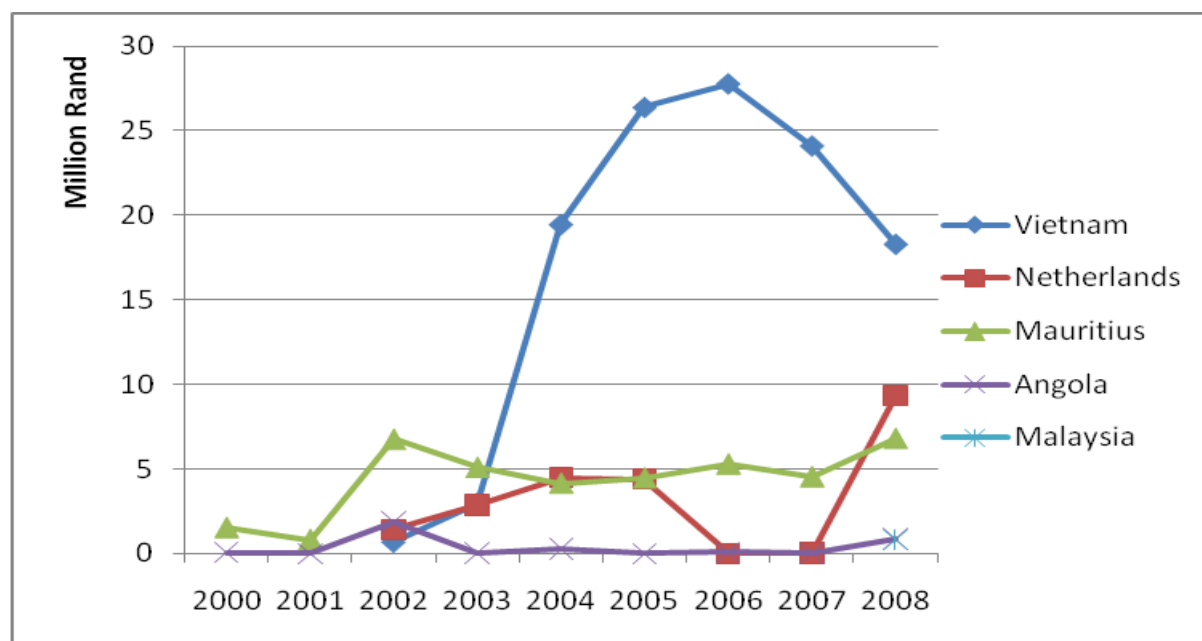
The forestry sector is examined in the next two figures. The main forestry export in terms of value for the Western Cape according to the 2-digit level HS code is that of fuel wood. As seen in Figure 17, the export value of fuel wood decreased since 2005 with a slight increase from 2007 to 2008. The contribution to the total value of exports in the Western Cape follows the same trend over the time period with the exception of a decrease from 2007 to 2008.

Figure 17: Value of exports of forestry (fuel wood) over time and its contribution to total Western Cape exports



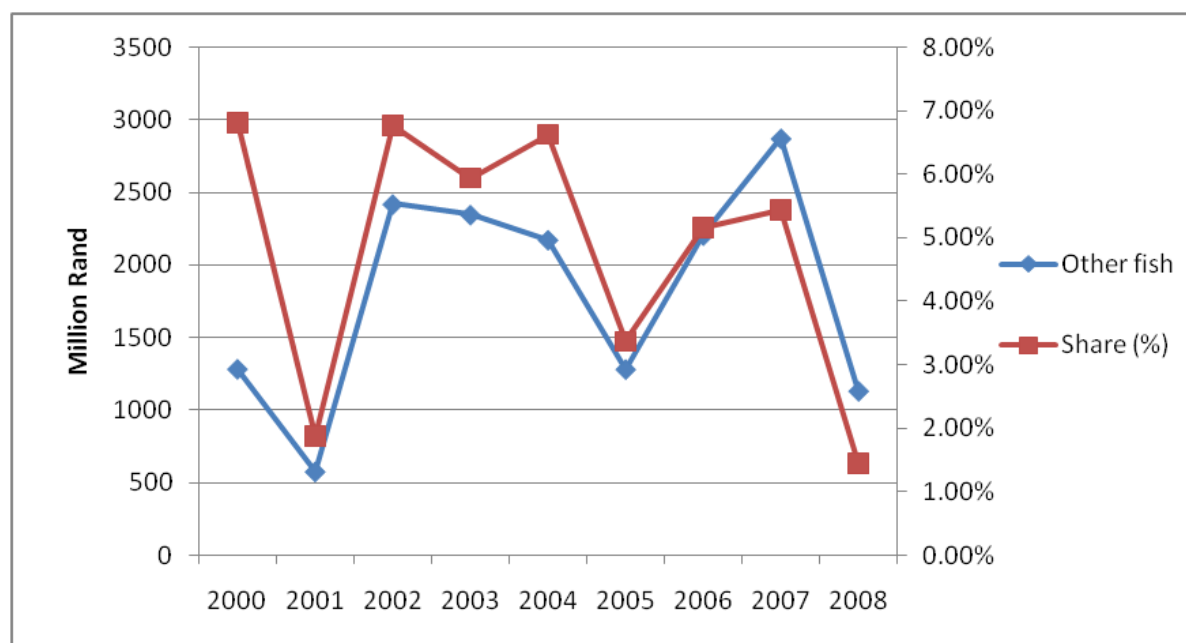
Source: Own calculations from SARS data (2000 - 2008)

In Figure 18 the different countries to which fuel wood are exported are examined. Vietnam has taken the lead since 2004. There has been a decrease in value of exports of fuel wood to Vietnam since 2006. Exports of fuel wood to Mauritius have stayed relatively constant over the time period 2000 to 2008.

Figure 18: Value of exports to different countries for forestry (fuel wood) over time

Source: Own calculations from SARS data (2000 - 2008)

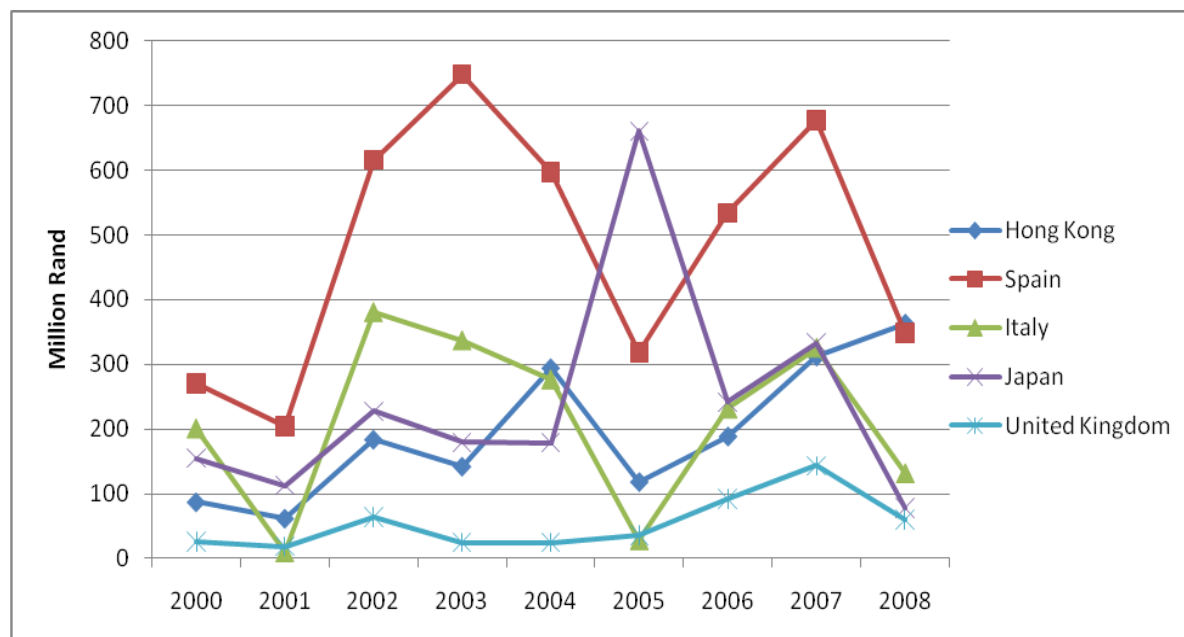
Figure 19 indicates that the value of exports of fisheries products (excluding live fish, i.e. 'other fish') varied over time. 'Other fish' exports are also the second largest export for the Western Cape agricultural, forestry and fisheries sector as seen in Table 10. No specific trend can be identified over the period 2000 to 2008. The percentage contribution of other fish exports in the Western Cape to total exports also varied yearly in accordance to the value of exports.

Figure 19: Value of exports of 'other fish' over time and its contribution to total Western Cape exports

Source: Own calculations from SARS data (2000 - 2008)

Figure 20 indicates the fisheries exports (excluding live fish), and the data shows some irregular movements. Only the United Kingdom seems to be relatively stable with regards to export value. Spain seems to dominate throughout the period 2000 to 2004 and again in 2006/7. Japan and Hong Kong took over the lead in 2005 and 2008 respectively.

Figure 20: Value of exports to different countries for 'other fish' over time



Source: Own calculations from SARS data (2000 - 2008)

Forestry exports from the Western Cape have increased from R47.8 million in 2000 to R63.6 million in 2008, representing 0.25% of value of total Western Cape exports in 2000 and 0.08% in 2008.

Fisheries exports from the Western Cape have increased from R535.9 million in 2000 to R1.13 billion in 2008, representing 2.85% of value of total Western Cape exports in 2000 and 1.45% in 2008.

7. A detailed look at Western Cape agricultural, forestry and fisheries trade in 2008

The Western Cape agricultural trade has been divided into six categories according to their HS code on the 4 digit level. The six categories are: Live animals, other animals and animal products, field crops, horticulture, forestry and fishery⁵. The following six tables offer for each of these categories the top three or top five imports and exports. In some cases the category is small, and thus only the top three imports and exports are given.

Table 11 provides the top three imports and exports for live animals and imports are dominated by poultry (84.2% of total live animals) whilst exports are dominated by other animals (47.6%) such as parrots, parakeets, macaws, etc. Live sheep and goats follow in the import market while horses, asses, etc. follow 'other live animals' in the export market.

Table 11: Top three imports and exports for live animals

Imports		Exports	
Product	Value (Rand)	Product	Value (Rand)
Poultry live	4 604 811	Other live animals especially parrots, parakeets etc.	3 813 165
Sheep and goats live	520 833	Horses, asses, mules and hinnies	2 497 927
Other live animals (all other animals)	344 376	Bovine cattle	921 000
Other	0	Other	782 664
Total live animals	5 470 020	Total live animals	8 014 756

Source: Own calculations from SARS data (2008)

Table 12 gives the top five imports and exports for other animal products and it can be seen that raw skins of other animals, i.e. all other animals not mentioned (39.5%), lead the export market whereas 'other products' (51.8%) lead the import market. Raw skins of other animals and natural honey feature in both the top five imports and exports.

Table 12: Top five imports and exports for other animals and animal products

Imports		Exports	
Product	Value (Rand)	Product	Value (Rand)
Other products (all other products not mentioned)	27 574 217	Raw skins of other animals (all other animals)	8 224 708
Raw skins of other animals especially ostriches	22 251 565	Eggs	5 518 976
Natural honey	1 353 148	Other products such as unworked products of fish and crustaceans	4 945 765
Animal wax	1 104 196	Natural honey	1 041 185
Shorn wool	762 488	Snails	1 016 420
Other	218 324	Other	49 379
Total other animals and animal products	53 263 938	Total other animals and animal products	20 796 433

Source: Own calculations from SARS data (2008)

⁵ See Appendix B for breakdown.

In Table 13 the top five imports and exports for field crops are given. Durum wheat and seed of wheat are imported the most (37.6% of field crop imports) with rice following it. In the export market, seed corn is exported the most (27.7%) followed by sugar beet. Maize, sugar beet and sunflower seeds are not produced in significant quantities within the borders of the Western Cape, and are thus field crops that are produced in other provinces and exported from the Cape Town harbour, and with the exporter being located in the Western Cape.

Table 13: Top five imports and exports for field crops

Imports		Exports	
Product	Value (Rand)	Product	Value (Rand)
Durum wheat & seed of wheat	980 615 228	Seed corn (maize)	311 375 676
Rice	767 881 846	Sugar beet	279 563 530
Tobacco	587 567 293	Sunflower seeds	176 832 071
Sugar beet seeds other beet seed	105 669 630	Durum wheat & seed of wheat	105 954 634
Oats	40 701 779	Sugar beet seeds other beet seed	76 133 062
Other	126 820 055	Other	174 876 910
Total field crops	2 609 255 831	Total field crops	1 124 735 883

Source: Own calculations from SARS data (2008)

Horticulture, which is very prominent in the Western Cape, is discussed in Table 14. The biggest import is that of dried leguminous vegetables (42% of total horticulture) followed by citrus fruit. The leading export is citrus fruit (41%) followed by apples and pears (25%). The citrus fruit exports from the Western Cape accounts for 77% of South Africa's citrus exports. However, citrus fruit production in the Western Cape accounts for only about 20% of South Africa's production, hence it can be deduced that citrus from other provinces are exported by Western Cape based exporters. Regardless the citrus exports, the value of horticultural exports indicates that the horticulture industry plays an important role in the Western Cape agricultural sector.

Table 14: Top five imports and exports for horticulture

Imports		Exports	
Product	Value (Rand)	Product	Value (Rand)
Dried leguminous vegetables	104 836 904	Citrus fruit especially oranges	4 470 962 272
Citrus fruit especially grape fruit	19 324 341	Apples and pears	2 687 902 338
Berries especially kiwi fruit	17 958 112	Grapes fresh	2 608 147 327
Coconuts, brazil nuts, cashew nuts	17 226 071	Other fruit especially apricots	491 004 411
Dried fruit	17 001 760	Other Berries	149 181 312
Other	73 438 290	Other	540 836 436
Total horticulture	249 785 478	Total horticulture	10 948 034 096

Source: Own calculations from SARS data (2008)

Table 15 provides the top five imports and exports for the forestry sector, with logs dominating the export market (35.1%) and natural rubber dominating the import market (28.2%). Vegetable saps and extracts are the second largest export and import in terms of value for the Western Cape.

Table 15: Top five imports and exports for forestry

Imports		Exports	
Product	Value (Rand)	Product	Value (Rand)
Natural Rubber	21 190 374	Logs especially other wood such as oak	22 323 518
Vegetable saps and extracts especially rattans	20 454 250	Vegetable saps and extracts especially other not coded for	17 433 336
Logs especially tropical wood	18 456 219	Fuel wood	10 299 877
Plant gum	5 411 300	Other wood in the rough	6 592 767
Natural cork and other	3 732 726	Vegetable saps used for plaiting	5 852 677
Other	5 780 513	Other	1 137 088
Total forestry	75 025 382	Total forestry	63 639 263

Source: Own calculations from SARS data (2008)

Fisheries are discussed in the next table. Other aquatic invertebrates top both the import and export market (88.5% and 42% respectively). This group is mainly made up by oysters, mussels, abalone and scallops but cuttle fish and squid top both imports and exports in this group. Fresh fish is the second largest imported group. Crustaceans (Lobster, shrimp, prawn and crab) are the second biggest export group.

Table 16: Top three imports and exports for fisheries

Imports		Exports	
Product	Value (Rand)	Product	Value (Rand)
Other aquatic invertebrates especially cuttle fish and squid	190 937 049	Other aquatic invertebrates especially cuttle fish and squid	477 179 876
Fresh fish especially salmon	21 016 052	Crustaceans	347 633 621
Live fish	1 952 785	Fresh fish such as snoek and tuna	303 662 728
Other	1 913 206	Other	7 184 895
Total fishing	215 819 092	Total fishing	1 135 661 120

Source: Own calculations from SARS data (2008)

8. Conclusion

The reintegration of the South African economy into the world economy brought along major changes and as result of these changes imports and exports started increasing. Agriculture in South Africa also evolved into a global competitive market and a leader in agricultural trade for Africa. Between 2007 and 2008, agricultural imports and exports increased significantly but this was due to increases in prices on certain products such as cereals, fruits and nuts and not due to increases in volumes.

This paper aimed to report trade for 2008 for the Western Cape and trade trends between 2000 and 2008. The first results section compares trade statistics for the Western Cape those for the South Africa. Resulting from the paper is that in South Africa and the Western Cape, total value of imports are more than the total value of exports, but in the agricultural sector of both South Africa and the Western Cape, exports still dominate. Western Cape exports in 2008 amounted to R12 518 million, which is 45% of South African agricultural exports. This value excludes wine exports from the Western Cape to the value of R6 151 million, which is not deemed part of primary agriculture for purposes of this study.

The main importing countries for the Western Cape include Saudi Arabia (15.3%) and Angola (11.4%), while the main exporting countries are India (11.9%) followed by the Netherlands (9.0%). When considering only agricultural, forestry and fisheries products, the main importing countries for the Western Cape include Argentina (19.1%) followed by Thailand (14.9%), while the main exporting countries are the Netherlands (18.7%) followed by the United Kingdom (16.4%).

The Western Cape agricultural trade situation in 2008 was explored by dividing the sector into six sub-categories. At the top of the list of exports are horticultural products such as citrus fruit, apples, pears and table grapes. Production statistics imply that a large portion of

the citrus exported from the Western Cape is not produced in the Western Cape. Tracing the top three imports and exports of 2008 back to 2000, it is revealed that there was a significant rise in the nominal values of imports and exports. However, the contribution of Western Cape agricultural imports to total Western Cape imports remained about 1.6%, but the contribution of Western Cape agricultural exports to total Western Cape exports increased from 14.9% in 2000 to 16.0% in 2008. The impact of the price increase between 2007 and 2008 is also visible. The time series data were not adjusted for CPI, and thus only provide nominal values and not real values. The two main export countries for fruits and nuts remained stable over time with the Netherlands and the United Kingdom taking the first and second place.

The values of exports and imports of forestry and fisheries from 2000 to 2008 indicate that for fisheries the trade varies over time and the main trading partners also changes notable every year. The value of forestry trade is more stable than fish trade and since 2004 the main export country was Vietnam, but the United States dominates for imports.

According to the classification of agricultural products used in this paper and taking the value of traded agricultural products in 2008, South Africa and Western Cape are still net exporters of agricultural products.

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10. Appendix A

Table 17: Information on SARS trade datasets for consecutive years

Year	Rows of data (number)	
	Import	Export
2000	432 096	182 003
2001	437 478	221 382
2002	703 886	256 847
2003	496 527	304 329
2004	1 447 966	661 758
2005	605 257	391 028
2006	1 677 936	855 498
2007	677 560	473 118
2008	1 737 423	1 019 167

11. Appendix B

Table 18: Agricultural, forestry and fisheries products groups

Six main groups	2-digit level	4-digit level
1. Live animals	Live animals	Horses asses mules and hinnies live Bovine cattle live Swine live Sheep and goats live Poultry live Other live animals
2. Other animals and animal products	Live animals	Snails, other than sea snails, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine
	Eggs and other products from animals	Eggs Natural honey Edible products of animal origin Other products
	Hides and skins	Raw skins of other animals n.e.c. (fresh or preserved but not further prepared)
	Raw furskins	Raw furskins of fur-bearing lambs
	Beeswax	Wax
	Wool and other fibres (partly)	Shorn wool Fine animal hair
	Silkworm cocoons	Silkworm cocoons suitable for reeling
3. Field crops	Coffee, tea and spices	Coffee, not roasted Mate Pepper Vanilla beans Cinnamon Cloves Nutmeg, Cardamom Seeds of spices Ginger, saffron, turmeric etc. Other spices
	Grains	Durum wheat & seed of wheat Rye Barley, for malting purposes Oats Seed corn (maize) Rice Grain sorghum Buckwheat, Millet, Canary seed

Six main groups	2-digit level	4-digit level
	Oil seeds	Soybeans, whether or not broken Peanuts (ground-nuts) Flaxseed (linseed) Colza seeds Sunflower seeds Other oil seeds Sugar beet seeds other beet seed Sugar beet Cereal straw and husks Lucerne (alfalfa) meal and pellets
	Cocoa Beans	Cocoa Beans
	Tobacco	Tobacco
	Cotton	Cotton whether or not ginned
	Flax, jute, hemp and other fibres	Flaxes Hemp and other Jute and other textile
	Wool and other fibres (partly)	Other fibres
4. Horticulture	Plants	Live plants Bulbs Live plants Shrubs and cuttings Cut Flowers Foliage, branches and other parts of plant Other raw vegetable materials Plants and parts of plants used primarily in perfumery in pharmacy or for insecticidal fungicidal or similar purposes
	Vegetables	Potatoes Tomatoes Onions and garlic Cauliflower, broccoli, cabbage Lettuce Carrots and Radish Cucumber Peas and beans Other vegetables Dried leguminous vegetables Edible roots and tubers
	Nuts and fruits	Coconuts, Brazil nuts, Cashew nuts Other nuts Bananas Dates fig pineapples avocados mangoes guavas mango Citrus fruit Grapes fresh

Six main groups	2-digit level	4-digit level
		Melons Apples and pears Other fruit Berries Dried fruit
5. Forestry	Vegetable saps	Plant gum
	Fuel wood and logs	Fuel wood Logs Other wood in the rough
	Natural cork and other wood products	Natural cork and other
	Vegetable material	Vegetable saps and extracts Vegetable saps used for plaiting Cotton linters
	Rubber	Natural Rubber
6. Fish	Live fish	Live fish
	Other fish	Fresh or chilled fish Crustaceans Other aquatic invertebrates Coral and similar products of shells Seaweeds and other algae

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