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Estudio de Mercado

**OPPORTUNITIES IN SOUTH
AFRICAN MARKET FOR
AGRICULTURAL AND
PROCESSED FOOD PRODUCTS
FROM PERU**



prom
perú

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1.0 Introduction

This report follows a market and product prioritisation exercise where South Africa’s imports of agricultural, food and beverage products were matched with Peruvian exports to identify products offering the greatest potential for export to South Africa. On the basis of this detailed analysis and discussion with PROMPERU, the list of products for further investigation in this report are as follows:

HS Code	Description	Peruvian Offer
AGRO		
081190	Fruit & nuts, n.e.s., uncooked/cooked by steaming/boiling in water, frozen	Frozen mangoes and pulp avocados
090420	Fruits of the genera Capsicum/Pimenta, dried/crushed/ground	Paprika
091010	Ginger	
180400	Cocoa butter, fat & oil	
200599	Vegetables & mixtures of vegetables prepared/ preserved not frozen	Artichokes and piquillo pepper
200799	Preparations of fruit obtained by cooking	Grapes, strawberries
200899	Edible parts of plants, prepared/ preserved	Mango pulp
200980	Juice of any single fruit/vegetable (excl. of 2009.11-2009.79)	Passion fruit
071333	Kidney beans, incl. white pea beans (Phaseolus vulgaris), dried, shelled, whether/not skinned/split	Black eyed peas
071339	Beans (Vigna spp., Phaseolus spp., dried, shelled, whether/not skinned/split	Black eyed peas
FISHERY		
030499	Fish fillets & other fish meat whether/not minced, n.e.s.	MahiMahi (Coryphaena hippurus), Rainbow Trout (Oncorhynchus mykiss), South Pacific Hake (Merluccius gayi peruanus)

HS Code	Description	Peruvian Offer
030613	Shrimps & prawns, whether/not in shell, frozen	Whiteleg shrimp (<i>Litopenaeus vannamei</i>)
160413	Sardines, sardinella & brisling/sprats, prepared/ preserved, whole/in pieces	Peruvian sardines (<i>Engraulis ringens</i>)
160419	Fish (excl. of 1604.11-1604.16), prepared/preserved, whole/in pieces (excl. minced)	Jack/horse Mackerel (<i>Trachurus picturatus murphyi</i>)
160420	Prepared/ preserved fish other than whole/in pieces	Jack/horse Mackerel (<i>Trachurus picturatus murphyi</i>)

2.0 The Market

2.1 Local production

2.1.1 Agro

South Africa has a strong agricultural sector and although the industry accounts for only 2.5% of overall GDP, it has strong forward and backward linkages into the economy and the overall contribution of agri-industry sector is considerably higher than this.

In addition to providing fresh produce, the agricultural sector generally provides the necessary inputs into the food processing sector which is diverse, with manufacturers having to meet the needs of the sophisticated middle and upper income groups, while at the same time providing staple foods at low prices to the poorer sectors of the population. The drivers for growth in the agri-food sector are overall population growth and rising incomes, particularly with the emergence of a strong black middle class.

The major fruit and vegetable crops grown in South Africa, and the annual production volumes are detailed in the table below.

Table 1: South Africa’s Production of Fruits and Vegetables

Crop	Total Production 2010/11 (1,000 tons)	Crop	Total Production 2010/11(1,000 tons)
Fruit		Crops	
Apples	767	Dry beans	46
Apricots	50	Vegetables	
Grapes	1,683	Potatoes	2,167
Pears	359	Tomatoes	522
Peaches	171	Pumpkins	237
Plums	67	Green corn	340
Prunes	3.5	Onions	564
Cherries	0.3	Sweet potatoes	63
Quinces	0.2	Green peas	12
Figs	2	Beetroot	62
Strawberries	5	Cauliflower	15
Other Berries	1	Cabbage & red cabbage	158
Watermelons & melons	151	Carrots	152
Other summer fruit	15	Green beans	25
Dried Fruit – Tree fruit	5.3	Other	405
Dried Fruit – Vine Fruit	29	Total vegetables	4,722
Avocadoes	82		
Bananas	397		
Granadillas	1.2		
Litchis	6		
Guavas	32		
Mangoes	53		
Pawpaws	12		
Pineapples	99		
Oranges	1,458		
Lemons & limes	256		
Grapefruit	406		
Naartjies (Tangerine)	26		

Source: Abstract of Agricultural Statistics 2012, Department of Agriculture

Fruit Production

The main growing regions for **avocados** are Mpumalanga and Limpopo Provinces, and 8% of the local crop is grown in KwaZulu-Natal Province. While the Fuerte cultivar dominates South African acreage at around 40% of the total, the Hass cultivar now accounts for approximately 35% of acreage and is the only variety seeing significant expansion. Ryan, Pinkerton and Edranol are also grown, and there is a growing interest in Lamb Hass, Harvest and Gem. In South Africa,



avocados are produced from February to October, and there is a small window for imports during the months of November, December and January. During these months the fruit is imported mainly from Spain, Israel and Kenya. Local production of avocados is between 75,000 and 100,000 tons per annum. The avocado processing industry is relatively small and produces 2,000 to 3,000 tons of avocado oils and Guacamole (frozen mashed avocado with added spices) for the catering trade and small amounts of exports.

The South African production of **mangoes** fluctuated between 40,000 and 75,000 tons of fruit per annum. Although the percentage of fruit exported has declined in the recent years, the local market is responsible for about 20,000 tons of fresh fruit sales annually. Other distribution channels have grown to absorb the remaining fruit and the dried mango industry processes almost 15,000 tons of fresh fruit per year. Juicing and achar are also major outlets, accounting annually for approximately 20,000 tons and 15,000 tons respectively. The main growing areas for mangoes in South Africa are in the provinces of Mpumalanga, Limpopo and KwaZulu-Natal.

Small volumes of mangoes are imported from Zimbabwe and Mozambique, who have slightly longer growing seasons than South Africa. The local growing season is between December and May, with the majority of the crop being harvested during the December and January months, and from June to November, mangoes are imported into South Africa. Pulp is supplied frozen to the fruit juice manufacturers, according to their specifications. Prices are set at the beginning of December and the companies procure the year's supply of pulp during the two month growing season.

The local growing season for **strawberries** lasts from June to March, and imports are necessary to meet demand for the remaining months. Fresh strawberries are mainly imported from the Middle East and Egypt during the out-of-season period.

Passion fruit is available locally 12 months of the year from different provinces around South Africa, and as a result very little importing of the fruit is necessary. Contract farmers are mostly used for supply of pulp to fruit juice manufacturers. Prices are set once a year, and the pulp is received regularly throughout the year.

Vegetable Production

South Africa's total vegetable production in 2010/11 was 4.7 million tons. Potatoes are the country's key vegetable crop and South African growers produce potatoes throughout the year. The potato processing industry has grown over the past ten years, and this industry now represents 19% of the total potato crop. The processing industry uses 380,000 tons of fresh potatoes of which 320,000 tons are contracted from producers and the balance purchased from the fresh produce markets. The largest part of the processing industry is made up of processing potatoes into french fries, frozen and chilled products and crisps. The remaining prepared frozen vegetable sector is small, with a limited amount of production by a few small players.

South Africa does not produce sufficient dry beans or legumes to meet local demand. On average, local demand meets around 50% of requirements with the shortfall being imported. Varietals grown locally include large white kidney beans, small white beans, sugar beans and Haricot beans. In South Africa, dry beans are either canned or sold in pre-packed quantities, the latter dominates the market. According to industry experts, the canning side of the market is in the region of 15,000 to 17,000 tonnes per annum. This implies that pre-packers use around 100,000 tonnes of beans per annum. Imports are generally handled by commodity traders and specialist importers then re-labelled and sold in retail stores across the country. Imported white beans are destined almost exclusively to canners for the production of baked beans.

According to the South African Canning Association, more than 600,000 tons of fresh fruit, tomatoes and vegetables are processed annually, and these are sourced from 1,500 farms. Vegetables for canning are grown in most parts of the country. However, the processed vegetable market is relatively undeveloped in South Africa, due to the availability of cheap imports.

Cocoa

South Africa produces no cocoa and all requirements are imported.

Paprika

In the late 1990's South Africa and neighbouring African countries grew large quantities of high quality paprika. However, production has declined dramatically given the availability of higher value crops and there are now only a few producers in the country. Local production is between 500 and 1,000 tonnes per annum.

Paprika is imported crushed and dried for two distinct local markets: spice processors and the local oleoresin extractors. The former represents the larger market in terms of volume whilst the oleoresin extractors represent the market for very high quality A Grade paprika. The spice blenders and packers will often use B and C grade paprika.

2.1.2 Fisheries

According to FAO statistics, South Africa’s total production of fishery products in 2010 was 614,635 tonnes. The users of marine resources are divided into three major groups, recreational, subsistence and commercial. The recreational users collect or catch fish and other marine species as part of leisure activities. These include shore anglers, underwater fishers, shellfish and bait collectors and recreational boat anglers. Subsistence fishers are largely individuals located in remote rural areas who collect fish for own consumption. The commercial fisheries make up the formal fishing industry and range from relatively small-scale and labour intensive inshore fisheries to the highly industrialised deep-water trawls. There are 18 recognised commercial fisheries which are divided into four clusters as illustrated in the table below.

South Africa’s Commercial Fisheries

Cluster A	Cluster B
Hake (<i>M. paradoxus</i> ; <i>M. capensis</i>) deep water bottom trawl; · Hake (<i>M. paradoxus</i> ; <i>M. capensis</i>); sole (<i>Austroglossus pectoralis</i>) inshore bottom trawl; Horse mackerel (<i>Trachurus</i> spp.) mid-water trawl; Small pelagics purse-seine; · Patagonian toothfish (<i>Dissostichus eleginoides</i>) long-line; · South coast rock lobster (<i>Palinurus gilchristi</i>) trap long-line; and · KwaZulu-Natal prawn (<i>Metapenaeus monoceros</i>) bottom trawl.	Hake long-line (<i>M. paradoxus</i> ; <i>M. capensis</i>); · West coast rock lobster (<i>J. lalandii</i>), off-shore traps; · Squid (<i>Loligovulgaris reynaudii</i>) jigging; · Seaweed (<i>Ecklonia maxima</i> , <i>Laminaria pallida</i> and <i>Gracilaria</i> spp.) harvesting; · Tuna Albacore (<i>Thunnus alalunga</i>) pole; and Demersal shark long-line.
Cluster C	Cluster D
Handline hake (<i>M. paradoxus</i> ; <i>M. capensis</i>); and · West coast rock lobster (<i>J. lalandii</i>), near-shore hoop-nets. ·	Net fish (gillnets, beach seine and KwaZulu-Natal beach seine); · Oysters (<i>Crassostrea gigas</i>); and · White mussels (<i>Donax serra</i>).

Source: The Southern African Sustainable Seafood Initiative

The table below details South Africa's production of fishery products by species. The most important contributors to the overall catch are Southern African Anchovy (38% of volume), Southern African Pilchard (20%), Cape Hakes (19%) and Whitehead's Round Herring (16%).

Table 2: South Africa's Production of Fish and Prawns/Shrimp by Species, 2010 (Quantity: tonne)

Species	Scientific name	2010	Percentage of total
Knife shrimp	Haliporoides triarthrus	16	0.0%
Albacore	Thunnus alalunga	4 170	0.7%
Bigeye tuna	Thunnus obesus	323	0.1%
Black marlin	Makaira indica	19	0.0%
Blue marlin	Makaira nigricans	7	0.0%
Blue antimora	Antimora rostrata	1	0.0%
Cape hakes	Merluccius capensis,M.paradox.	108 964	19.1%
Grenadiers nei	Macrourus spp	8	0.0%
Mud sole	Austroglossus pectoralis	570	0.1%
Tonguefishes	Cynoglossidae	18	0.0%
Southern African anchovy	Engraulis capensis	217 042	38.1%
Southern African pilchard	Sardinops ocellatus	112 386	19.7%
Whitehead's round herring	Etrumeus whiteheadi	8 8574	15.6%
Marine fishes nei	Osteichthyes	4 941	0.9%
Marlins,sailfishes,etc. nei	Istiophoridae	11	0.0%
Black musselcracker	Cymatoceps nasutus	4	0.0%
Canary drum(=Bardman)	Umbrina canariensis	13	0.0%
Carpenter seabream	Argyrozona argyrozona	345	0.1%
Daggerhead breams nei	Chrysoblephus spp	227	0.0%
Emperors(=Scavengers) nei	Lethrinidae	1	0.0%
Geelbek croaker	Atractoscion aequidens	439	0.1%
Groupers, seabasses nei	Serranidae	32	0.0%
Mullets nei	Mugilidae	640	0.1%
Panga seabream	Pterogymnus laniarius	1 549	0.3%
Porgies, seabreams nei	Sparidae	180	0.0%
Red steenbras	Petrus rupestris	3	0.0%
Santer seabream	Cheimerius nufar	71	0.0%
Snappers, jobfishes nei	Lutjanidae	1	0.0%
Southern meagre(=Mulloway)	Argyrosomus hololepidotus	596	0.1%
White stumpnose	Rhabdosargus globiceps	78	0.0%
Alfonsinos nei	Beryx spp	39	0.0%
Blackbelly rosefish	Helicolenus dactylopterus	679	0.1%
Cape bonnetmouth	Emmelichthys nitidus	367	0.1%
Cape gurnard	Chelidonichthys capensis	461	0.1%
Devil anglerfish	Lophius vomerinus	7 816	1.4%
John dory	Zeus faber	993	0.2%
Kingklip	Genypterus capensis	2 685	0.5%

Species	Scientific name	2010	Percentage of total
Oilfish	<i>Ruvettus pretiosus</i>	36	0.0%
Orange roughy	<i>Hoplostethus atlanticus</i>	2	0.0%
Patagonian toothfish	<i>Dissostichus eleginoides</i>	325	0.1%
Silver scabbardfish	<i>Lepidopus caudatus</i>	3 464	0.6%
Snoek	<i>Thyrsites atun</i>	10 221	1.8%
Narrow-barred Spanish mackerel	<i>Scomberomorus commerson</i>	3	0.0%
Skipjack tuna	<i>Katsuwonus pelamis</i>	2	0.0%
Southern bluefin tuna	<i>Thunnus maccoyii</i>	35	0.0%
Swordfish	<i>Xiphias gladius</i>	540	0.1%
Tuna-like fishes nei	<i>Scombroidei</i>	105	0.0%
Yellowfin tuna	<i>Thunnus albacares</i>	368	0.1%

Source: FAO Fisheries and Agriculture Department

Linefish comprise another important South African fishery with respect to total tonnes landed and total value. Landings from the open-access recreational fishery are not reported, however, and the total catch from this sector is estimated to be double that of the reported commercial sector.

The uncontrolled exploitation of these stocks has had significant adverse effects: of the most frequently targeted linefish species, at least 18 are classified as collapsed, 4 as over-exploited, 6 as optimally exploited, and only 2 as under-exploited.

Two linefish species currently being optimally exploited are snoek (*Thyrsites atun*) and yellowtail (*Seriola lalandii*). Hottentot (*Pachymetopon blochii*), elf/shad (*Pomatomus saltatrix*), red roman (*Chrysoblephus laticeps*), and carpenter (*Argyrozona argyrozona*) are considered to be over-exploited, while some of those that have collapsed are silver kob (*Aryrosomus inodorus*), white steenbras (*Lithognathus lithognathus*), red stumpnose (*Chrysoblephus gibbiceps*) and slinger (*Chrysoblephus puniceus*).

The South African fishing industry converts pelagic fish unsuitable for human consumption into animal feed with high nutritional value. Nine factories along the west and southeast coasts of South Africa produce fish meal and fish oil. The animal feeds industry utilises around 75,000 tonnes of fishmeal per annum.

Local production of canned fish accounts from some 18% of consumption or around 12,000 tonnes on an annual basis. It is important to note that the South African fishing industry is intrinsically linked to the Namibian fishing industry and a further 2% of canned consumption is

sourced from Namibian factories. The remaining 80% of canned requirements are imported, primarily from Thailand.

The canning and processing of tuna is an extremely labour intensive industry and South Africa's relatively high labour rates along with limited local demand make it uneconomical to can tuna in South Africa. All canned tuna requirements are thus imported. There was a factory in Namibia that was canning tuna but the product was unable to compete with tuna from Thailand in the South African market.

There are a few companies that are canning pilchards and sardines. The common characteristic of all of the local canners is that they are large fishing companies that have quotas to harvest pelagic fish and who operate fully integrated operations i.e. from sea through to canning through to marketing and distribution. These factories also can fish for third parties. The key companies in this regard are Oceana Group, Foodcorp and Saldhana Foods.

2.2 Key Players

2.2.1 Agro

Tiger Brands

Website: www.tigerbrands.co.za

One of the largest canner of processed fruit and vegetables and the largest FMCG company in South Africa. Key brands are Koo canned baked beans, canned fruit & canned vegetables. All Gold canned tomatoes & preserves.

Rhodes Food Group

Website: www.rhodesfoodgroup.com

Deciduous fruit canners & processors and vegetable & tomato canners under the Rhodes brand name

Boland Pulp

Website: www.gerber.co.zaboland.html

Boland Pulp are manufacturers of fruit juice purees and concentrates to international standards, for both the South African and international export markets.

Breede Valley Fruit Processors

Website: www.bvfp.co.za

Specialist processors and producers of aseptically packed purees and concentrates

Ceres Fruit Processors

Website: www.ceres.co.za

Ceres Fruit Juices are the South African long life fruit juice category market leaders with a market share in excess of 50%. Primary brands are Ceres, Liqui-Fruit, Liqui -Cooler, Fruitree

National Brands / AVI

Website: www.avi.co.za

One of the largest food manufacturers and processors in South Africa. Brands include Sir Juice, The House of Orange, Real Juice, Quali Juice, I&J and Denny

Clover

Website: www.clover.co.za

Branded food and beverages group specialising primarily in dairy products. The company also produces fruit juices.

Parmalat

Website: www.parmalat.co.za

Branded food and beverages group specialising primarily in dairy products. The company also produces fruit juices.

Amalgamated Beverage Industries

Website: www.abi.co.za

Carbonated soft drink and fruit juice bottler. Key brands include Appeltiser, Grapetiser, Peartiser, Just Juice, Minute Made.

2.2.2 Fisheries

Oceana Group

Tel: +27 21 415 8500

Fax: +27 21 415 8601

Website: www.oceana.co.za

Oceana is a very large group and encompasses the full range of activities including the production of canned fish (Glenryk and Lucky Star brand of pilchards and sardines), frozen fish, cephalopods and crustacean, fresh and live fish and crustacean, canned pet food (Lucky Pet), French fries, pet food, fish meal as well as providing commercial cold storage and trading activities.

Oceana Brands

Tel: +27 21 415 8500

Fax: +27 21 415 8601

Website: www.ob.co.za

The Oceana Brands division of the Oceana Group is engaged mainly in fishing for inshore pelagic species (pilchard and anchovy) and in the production, marketing and distribution of fishmeal and branded canned fish products, particularly pilchards under the Lucky Star label in southern Africa. The majority of Oceana's canned fish products are processed at the cannery in St Helena Bay on the west coast of the Western Cape. However, insufficient product is generally available to

fully meet demand, which means additional supplies are imported to help meet local market demand.

The Lucky Star brand is the market leader in the canned pilchard market enjoying an estimated 75% share of the market. Lucky Star is available in the following variants:

- Lucky Star Pilchards are available in tomato and chilli flavours in five sizes: 425g, 400g, 305g (seasonably available), 215g and 155g. The canned Pilchard product is also available in minced fish (410g). The product is canned locally (South Africa and Namibia) and where required, shortfall is made up with imports from Thailand.
- Lucky Star's Canned Tuna is available in 170g ring pull cans, in vegetable oil and in water, with salt added. The Lucky Star tuna is canned in Thailand.
- Lucky Star Canned Sardines are 100% South African Sardines packaged in vegetable oil in 120g aluminum cans with a ring pull closure.

Viking Fishing

Tel: +27 21 - 419 4140/1/2

Fax: +27 21 - 419 6731

Web site: www.vikingfishing.co.za

The Viking Fishing Group of Companies operates a fleet of fishing vessels and processing factories throughout South Africa supplying wholesalers with fresh and frozen fish products

Sea Harvest

Tel: + 27 21 417 7900

Fax: + 27 21 425 4830

Web site: www.seaharvest.co.za

Sea Harvest is a vertically integrated fishing company. It owns its own fishing fleet and processing facilities on the Atlantic West Coast in Saldanha as well as on the India Ocean coast in Mossel Bay. The company employs more than 2 000 people and has capacity to catch and process over

40,000 tons of Cape Capensis per annum. Products are marketed in South Africa and abroad under the Sea Harvest and Cape Haddie brands.

Irvin and Johnson

Tel: + 27 21 440 7800

Web site: www.ij.co.za

I&J is a processor and marketer of an extensive range of branded frozen and chilled convenience foods in the fish line including fish fingers, battered fish, fish in sauce etc.

Marine Products

Tel: +27 21 440 5600

Website: www.foodcorp.co.za

Marine Products (a division of the Foodcorp Group) catches and processes canned pilchards, deep-water hake, lobster and fish meal products. It also purchases, processes and sells additional marine products from third parties.

Premier Fishing

Tel: +27 21 419 0124

Fax: +27 21 419 0173

Web site: www.premierfishing.co.za

Premier Fishing catches, processes and markets fish and other marine products. The company is fully integrated owning its own fishing fleet and processing units. Products range from rock lobster to canned pilchards, fish spreads, hake, fish meal, fish oil, squid and liquid fertiliser.

Foodcorp (Glenryck)

Tel: +27 21 440 5600

Website: www.foodcorp.co.za

Foodcorp is the third largest food company in South Africa, producing and distributing ingredients, staple foods and leading consumer brands. In the canned fish market, the company catch and can pilchards at their canning facility at Laaiplek in the Western Cape. The product is marketed under the iconic Glenryck brand. Glenryck is the second most popular brand of canned pilchard in the South African market enjoying an estimated 13% market share.

Glenryck pilchards are available in Tomato and Chilli flavours, and are either sold whole or minced.

Saldhana Foods

Tel: +27 21 425-8055

Web site: www.saldanhatuna.co.za

The Saldhana Foods Group is involved in the harvesting, canning and marketing of fish and fish products. The company can a range of pilchards at their factory in Saldhana in the Western Cape. They distribute a range of canned tuna which is packed in Thailand under the Saldhana brand.

Pioneer Fishing Group

1201 Standard Bank Center

Heerengracht

Cape Town

Phone: +27-21-421 5368

Fax: +27-21-421 0001

Web site: www.pioneerfishing.co.za

The Pioneer Fishing Group is a trawler and factory owner producing a wide range of fish products for local and export markets. The Group has its own infrastructure in terms of a fishing fleet, processing factories, engineering services, marketing and distribution.

The group operates modern E.U. and HACCP approved factories at Port Elizabeth on the East Coast and St. Helena Bay on the West Coast.

Canned pilchards are produced in a variety of pack sizes and sauces. Examples include tomato, chilli, piquant and natural oil. These products are produced under the Sea Pride, Viva and various other House brands.

Pioneer's canned pilchards are available in the following variants:

- Pilchard cutlets in tomato sauce: 215g, 425g, 155g
- Pilchard cutlets in chilli sauce: 215g, 425g, 155g
- Pilchard minced fish: 410g
- Pilchard cutlets in chilli, natural or tomato sauce: 425g, 410g, 425g

Ocean King

Tel +27 (11) 462 3799

Fax +27 (86) 553 9680

Web site: www.OceanKing.co.za

Ocean King® Portuguese Sardines (*Sardina pilchardus*) are caught and canned in Portugal and imported and distributed by **Humboldt Trading**.

Ocean King Portuguese Sardines are available in the following seven variants:

- Portuguese Sardines in Olive Oil
- Portuguese Sardines in Sunflower Oil
- Portuguese Sardines in Sunflower Oil with Chilli
- Portuguese Sardines in Tomato
- Portuguese Sardines in Salt Water
- Portuguese Sardines Boneless and Skinless in Olive Oil
- Portuguese Sardines in Olive Oil with Vegetables

Ocean King® Tuna (Skipjack Tuna (*Katsuwonus pelamis*)) is sourced from the Western Pacific and canned in Thailand. The product is available in 6 variants and three cuts: solid, chunks and shredded.

Goldcrest (Patleys)

12 Renaissance Drive

Crown mines, Johannesburg

Tel: (011) 226 8800

Fax: (011) 837 0614

Website: www.goldcrest.co.za / www.patleys.co.za

Goldcrest is the housebrand of Patleys, South Africa's largest importer and distributor of quality foodstuffs. The sardines are sourced from Portugal and the tuna from Thailand.

Goldcrest products are available in the following variants:

- Sardines in peri peri 120g
- Sardines in tomato 125g
- Sardines in veg oil 120g
- Tuna chunks in brine: 170g, 1.7kg
- Tuna chunks in oil 170g, 1.7kg
- Tuna shredded in brine 170g, 1.7kg
- Tuna shredded in oil 170g, 1.7kg

Mayfair (Maxims Packers and M&L Distributors)

Tel: +27 21 552 5190

Website: www.distributors.co.za

Maxims Packers and M&L Distributors are a professional sales and marketing company distributing major international brands and own label to all sectors of the South African grocery trade. Mayfair is the companies own label and incorporates a range of canned sardines imported from Portugal. The range includes the following variants:

- Sardines in Water 120g
- Sardines in Tomato 120g
- Sardines in Peri Peri 120g
- Sardines in Olive Oil 120g

The company also does a basic tuna range: solid, shredded and in chunks, in vegetable oil or brine. Maxims Packers and M&L Distributors also represent the Norwegian canned sardine producer, **King Oscar**. This is a premium brand and the product on the shelves in South Africa is packed in and imported from Poland

John West (Heinz Foods)

Tel: +27 21 807 5100

Web site: www.pioneerfoods.co.za

Heinz Foods South Africa combines HJ Heinz's international portfolio of brands and its strength in technology with the marketing and trading know-how of the local company, Pioneer Foods. John West is one of the premium Heinz brands and is a popular range in the South African market. The John West tuna comes in a number of varieties including g packaged with tomato, with chilli, with basil and with beans. John West also do a range of light meat shredded tuna in dressings (black pepper or lemon), that are packaged in foil sleeves for opening convenience.

Monteagle Africa & Indian Ocean Islands

La Lucia Durban, 4051

Tel: 031 566 7600

Website: www.monteaglegroup.com

Monteagle is a global, fully-integrated procurement, supply chain and risk management group. The group has an African office based in Durban in South Africa.

The company is importing and distributing Tuna Snack Packs under the Cape Point Brand. The product is specifically packaged in Thailand for Monteagle International in the United Kingdom. The product is a 95g tin of shredded tuna in brine which comes in a small plastic container with 6 crackers, a spoon and a serviette. A lemon and pepper version is also available.

Global Fish

Tel: +27 21 685 0950

Fax: +27 21 685 0954

Web site: www.globalfish.co.za

Through a relationship with Inter Continental Venture (ICV), Global Fish offers a range of canned seafood products. One of the shareholders of the company, Ocean Canning handles the operating and marketing of three canning facilities in Manila, Indonesia and General Santos.

Between the 3 canneries, Global Fish offer:

- Canned Skip jack Flakes in Oil/Brine

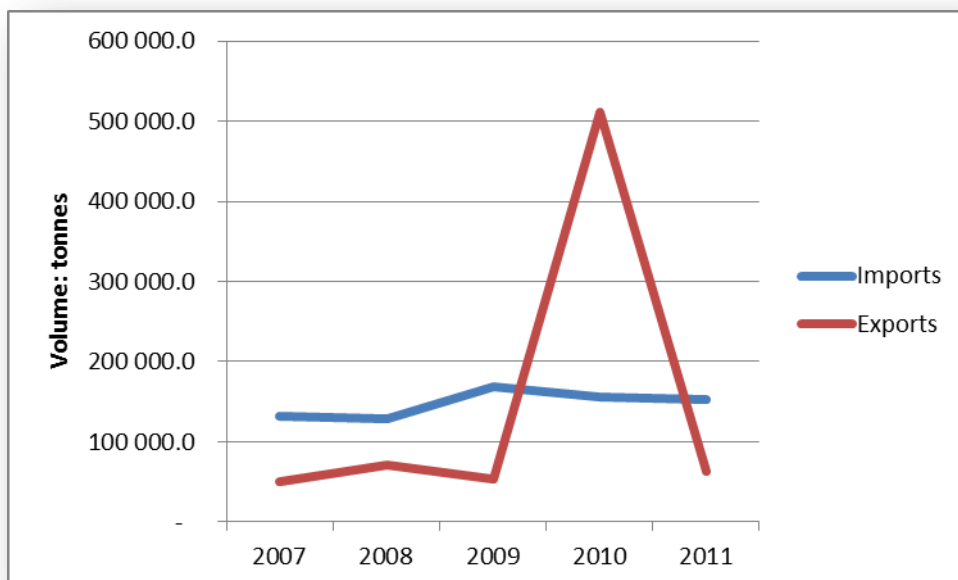
- Canned Skip jack chunks in Oil / Brine
- Canned Yellow Fin Flakes in Oil / Brine
- Canned Yellow Fin Chunks in Oil / Brine
- Canned Sardines in Tomato Sauce
- Canned Sardines in Tomato and Chilli Sauce

2.3 International Trade

South Africa is a net importer of the selected commodities covered in this report. Outside of the year 2010 when there is an anomaly in the statistics relating to an export to Zambia, the countries imports are consistently larger than export volumes.

As shown in the chart below, in 2011, South Africa’s imports of the selected commodities amounted to 152,311 tonnes with a value of US\$253.8 million. Growth in imports has been strong over a five year period with growth in volumes registered at 16% and growth in value at 47%. Exports in 2011 totalled 63,208 tonnes with a value of US\$119 million. Again growth has been strong with a 25% increase in export volumes and a 46% increase in value.

Figure 1: Volume of South Africa’s Trade in Selected Commodities



Source: Based on COMTRADE data

2.3.1 Imports

The table below details South Africa’s imports of the selected commodities for 2007 and 2011. Products where there are a high volume of imports are kidney beans and white pea beans (HS0713.33), Paprika (HS0904.20) and canned sardines (HS1604. 13).

Products which have shown the highest growth over the period are fruit & nuts, n.e.s., uncooked/cooked by steaming/boiling in water (HS0811.90), canned sardines (HS1604. 13) and prepared/preserved fish other than whole/in pieces (1604.20)

There are a few product categories where the volume of imports has declined over the five year period 2007 to 2011 including Beans (*Vigna* spp., *Phaseolus*) (HS 0713.39), cocoa butter (HS1804.00), fish fillets (HS030499) and fish prepared/ preserved, whole/ in pieces (1604.19). A number of these volume declines can be explained by the impact of the global financial crisis on South African consumers. This is particularly prevalent in the fresh and frozen fish and seafood market which has contracted markedly as consumers move to cheaper sources of protein.

Table 3: South Africa’s Imports of Selected Commodities 2007 and 2011

HS code	Description	2007		2011		Growth 2007 to 2011	
		Value: US\$ mn	Volume: tonne	Value: US\$ mn	Volume: tonne	Value: US\$ mn	Volume: tonne
AGRI							
071333	Kidney beans, incl. white pea beans (<i>Phaseolus vulgaris</i>), dried, shelled, whether/not skinned/split	50.4	77 307.5	62.0	82 774.2	23%	7%
071339	Beans (<i>Vigna</i> spp., <i>Phaseolus</i> spp. dried, shelled, whether/not skinned/split	4.4	6 806.3	1.9	1 808.7	-58%	-73%
081190	Fruit & nuts, n.e.s., uncooked/cooked by steaming/boiling in water, frozen, whether/not containing added sugar/other sweetening matter	1.8	774.1	3.1	1 527.9	74%	97%

HS code	Description	2007		2011		Growth 2007 to 2011	
		Value: US\$ mn	Volume: tonne	Value: US\$ mn	Volume: tonne	Value: US\$ mn	Volume: tonne
090420	Fruits of the genera Capsicum/Pimenta, dried/crushed/ground	5.7	4 874.0	10.6	4 450.4	88%	-9%
091010	Ginger	1.3	1 547.3	3.2	1 610.2	149%	4%
180400	Cocoa butter, fat & oil	22.1	4 887.4	18.6	4 046.2	-16%	-17%
200599	Vegetables & mixtures of vegetables, prepared/preserved otherwise. than by vinegar/ acetic acid, not frozen	2.3	1 764.0	3.1	2 137.8	34%	21%
200799	Preparations of fruit (excl. citrus fruit) obtained by cooking, whether or not containing added sugar or other sweetening matter	2.2	1 268.6	3.5	1 517.5	60%	20%
200899	Edible parts of plants, prepared/preserved, whether/ not containing added sugar/ other sweetening matter n.e.s.	5.8	3 630.6	9.4	5 176.5	62%	43%
200980	Juice of any single fruit/vegetable, unfermented & not containing added spirit, whether/not containing added sugar/other sweetening matter	7.6	4 000.2	9.0	4 911.6	20%	23%
FISHERIES							
030499	Fish fillets & other fish meat whether/not minced ,n.e.s.	2.6	1 406.1	2.5	893.5	-6%	-36%
030613	Shrimps & prawns, whether/not in shell, frozen	38.5	7 313.5	60.4	9 049.6	57%	24%
160413	Sardines, sardinella & brisling/sprats, prepared/ preserved, whole/in pieces	21.8	11 170.3	61.7	30 882.1	183%	176%

HS code	Description	2007		2011		Growth 2007 to 2011	
		Value:	Volume:	Value:	Volume:	Value:	Volume:
		US\$ mn	tonne	US\$ mn	tonne	US\$ mn	tonne
	(excl. minced)						
160419	Fish prepared/ preserved, whole/ in pieces (excl. minced)	5.6	3 983.8	1.6	450.3	-72%	-89%
160420	Prepared/preserved fish other than whole/in pieces	1.1	564.3	3.0	1 075.1	189%	91%
Grand Total		173.2	131 298.0	253.8	152 311.5	47%	16%

Source: COMTRADE

2.3.2 Exports

The table below details South Africa’s exports of the selected commodities for the years 2007 and 2011. The most important exports relate to South Africa’s fruit industry and include fruit juice, preparations of fruits and preparations of vegetables.

Table 4: South Africa’s Exports of Selected Commodities 2007 and 2011

HS Code	Description	2007		2011		Growth 2007 to 2011	
		Value:	Volume:	Value:	Volume:	Value:	Volume:
		US\$ mn	tonne	US\$ mn	tonne	US\$ mn	tonne
AGRI							
071333	Kidney beans, incl. white pea beans (Phaseolus vulgaris), dried, shelled, whether/not skinned/split	0.34	413.6	2.64	2 629.8	685%	536%
071339	Beans (Vigna spp., Phaseolus spp., dried, shelled, whether/ not skinned/split	0.73	1 219.2	1.34	1 137.3	84%	-7%
081190	Fruit & nuts, n.e.s., uncooked/cooked by steaming/boiling in water,	7.54	2 442.6	6.52	2 098.8	-14%	-14%

HS Code	Description	2007		2011		Growth 2007 to 2011	
		Value:	Volume:	Value:	Volume:	Value:	Volume:
		US\$ mn	tonne	US\$ mn	tonne	US\$ mn	tonne
	frozen, whether/ not containing added sugar/ other sweetening matter						
090420	Fruits of the genera Capsicum/ Pimenta, dried/ crushed/ground	3.66	2 116.5	2.22	913.3	-39%	-57%
091010	Ginger	0.24	77.2	0.25	93.5	4%	21%
180400	Cocoa butter, fat & oil	0.13	36.9	0.03	14.1	-79%	-62%
200599	Vegetables & mixtures of vegetables prepared/ preserved otherwise. than by vinegar/acetic acid, not frozen	1.41	651.4	2.42	1 064.2	72%	63%
200799	Preparations of fruit (excl. citrus fruit;), obtained by cooking, whether/ not containing added sugar/ other sweetening matter	1.42	1 276.0	9.77	10 031.9	590%	686%
200899	Edible parts of plants, prepared/ preserved, whether/ not containing added sugar/ other sweetening matter	24.45	12 661.0	19.18	9 545.3	-22%	-25%
200980	Juice of any single fruit/ vegetable, unfermented & not containing added spirit, whether/ not containing added sugar/ other sweetening matter	21.25	23 196.6	30.99	27 847.0	46%	20%
FISHERIES							
030499	Fish fillets& other fish meat whether/not minced,n.e.s.	1.56	401.7	2.28	632.8	46%	58%

HS Code	Description	2007		2011		Growth 2007 to 2011	
		Value:	Volume:	Value:	Volume:	Value:	Volume:
		US\$ mn	tonne	US\$ mn	tonne	US\$ mn	tonne
030613	Shrimps & prawns, whether/not in shell, frozen	3.26	165.8	4.70	247.6	44%	49%
160413	Sardines, sardinella & brisling/sprats, prepared/preserved, whole/in pieces (excl. minced)	4.21	2 397.5	4.47	1 301.1	6%	-46%
160419	Fish (excl. of 1604.11-1604.16), prepared/preserved, whole/in pieces (excl. minced)	1.90	668.9	20.84	3 695.9	998%	452%
160420	Prepared/preserved fish other than whole/in pieces	9.49	2 680.4	11.39	1 955.9	20%	-27%
Grand Total		81.60	50 405.2	119.05	63 208.4	46%	25%

Source: COMTRADE

2.3.3 Peruvian exports to South Africa

Peru does export some of the selected products to South Africa but trade has been disappointing reflecting a 88% decline in the volume and a 78% decline in the overall value over the period 2007 to 2011. In 2011, total trade amounted to US\$1.2 million, less than 1% market share.

Products where there has been a good uptake on the Peruvian offer are dried beans, Paprika, fruit pulps and fruit juices.

The table below details South Africa's imports of the selected products from Peru.

Table 5: South Africa's Imports of Selected Agri and Fisheries Products from Peru, 2007 - 2011

HS Code	Description	2007		2008		2009		2010		2011	
		Value US\$	Volume: kg	Value US\$	Volume: kg	Value US\$	Volume: kg	Value US\$	Volume: kg	Value US\$	Volume: kg
AGRI											
071333	Kidney beans, incl. white pea beans	7 119	11 250	-	-	4 101	6 800	-	-	-	-
071339	Beans (Vigna spp., Phaseolus spp.)	38 753	44 462	-	-	24 018	21 500	21 375	21 500	84 778	70 000
090420	Fruits of the genera Capsicum/Pimenta,	35 274	24 000	92 809	43 099	37 194	25 000	1 256 136	511 657	966 008	340 144
180400	Cocoa butter, fat & oil	-	-	-	-	-	-	-	-	2 516	318
200599	Vegetables & mixtures of vegetables prepared/ preserved	-	-	-	-	2	2	56 548	20 310	-	-
200799	Preparations of fruit homogenized	-	-	-	-	-	-	-	-	79	10
200899	Edible parts of plants, prepared/ preserved	-	-	-	-	46 113	16 322	230 377	183 285	14 381	20 000
200980	Juice of any single fruit/vegetable	43	1	91 904	25 000	155 556	25 000	484 955	173 280	121 911	49 844
FISHERIES											
030499	Fish fillets & other fish meat	-	-	41 443	21 600	33 866	24 442	-	-	-	-

HS Code	Description	2007		2008		2009		2010		2011	
		Value US\$	Volume: kg	Value US\$	Volume: kg	Value US\$	Volume: kg	Value US\$	Volume: kg	Value US\$	Volume: kg
030613	Shrimps & prawns, whether/not in shell, frozen	-	-	-	-	-	-	112 543	20 448	-	-
160413	Sardines, sardinella & brisling/sprats,	-	-	-	-	-	-	54 225	19 470	-	-
160419	Fish prepared/preserved, whole/in pieces	5 431 636	3 942 668	3 133 725	2 440 854	-	-	-	-	-	-
160420	Prepared/preserved fish other than whole/in pieces	-	-	15 052	21 505	-	-	-	-	-	-
Grand Total		5 512 825	4 022 381	3 374 933	2 552 058	300 850	119 066	2 216 159	949 950	1 189 673	480 316

Source: COMTRADE

2.3.4 Analysis of competitors: Key suppliers

Import of dried beans is dominated by China who supply over 90% of imports. The choice of China as a supplier is purely around price. The primary demand is for Red Speckled Dry Beans and white beans which are used by the canners to make baked beans. Peru does rank amongst the top suppliers of Beans (*Vigna spp.*, *Phaseolus spp*) where the country enjoys a 4% share of this market.

India is the key supplier of Paprika accounting for 50% of the volume of imports in 2011. China supplies a further 19% followed by Zimbabwe with 14%. Peru is the fourth largest supplier with an 8% share of the import market. Imports from Peru have shown massive growth albeit off a small base – in 2007 the countries market share was zero. The growth in imports from Peru has come at the expense of Zimbabwe and Spain.

Ginger is sourced primarily from China (65% of the volume in 2011). The decision to buy from China revolves around price and availability. Nigeria is the second largest supplier (16%) followed by India (11%).

Cocoa butter, fats & oils are sourced through trading houses in Singapore (42% of total volume in 2011), Malaysia (28%) and Thailand (18%). The Cote d'Ivoire used to be the key supplier but given the recent political unrest in the country, the demand has been met from elsewhere.

Prepared fruits and vegetables are sourced from a range of countries. Prepared vegetables under HS200599 are sourced mainly from Italy (53% of volume), followed by Spain (9%). The dominant supplier of prepared fruits is China. Again, imports from China are generally based purely on price.

Table 6: Competitors on Imported Products

	2007		2011		Percentage of total 2011 (volume)	Growth 2007 - 2011 (volume)
	Value: US\$	Volume: kg	Value: US\$	Volume: kg		
AGRI						
HS-071333 Kidney beans, incl. white pea beans (<i>Phaseolus vulgaris</i>), dried, shelled, whether/not						

	2007		2011		Percentage of total 2011 (volume)	Growth 2007 - 2011 (volume)
	Value: US\$	Volume: kg	Value: US\$	Volume: kg		
skinned/split						
TOTAL	50 424 208	77 307 475	62 019 201	82 774 238		7%
China	32 515 844	48 553 128	55 946 985	75 943 069	92%	56%
Ethiopia	2 815 279	4 847 626	2 923 008	3 966 881	5%	-18%
Brazil	6 814 164	10 841 109	802 994	1 009 913	1%	-91%
Kyrgyzstan	494 812	592 000	708 516	613 000	1%	4%
HS-071339 Beans (Vigna spp., Phaseolus spp. (excl. of 0713.31-0713.33)), dried, shelled, whether/not skinned/split						
TOTAL	4 426 650	6 806 310	1 868 789	1 808 702		-73%
China	1 926 782	3 153 599	866 302	1 035 062	57%	-67%
Turkey	-	-	129 928	115 000	6%	
Madagascar	64 960	97 500	119 243	94 562	5%	-3%
Tanzania	153 212	198 371	171 957	91 367	5%	-54%
USA	342 996	147 226	117 075	72 328	4%	-51%
Peru	38 753	44 462	84 778	70 000	4%	57%
Kyrgyzstan	76 161	89 000	76 480	69 000	4%	-22%
HS-081190 Fruit & nuts, n.e.s., uncooked/cooked by steaming/boiling in water, frozen, whether/not containing added sugar/other sweetening matter						
TOTAL	1 796 369	774 128	3 133 435	1 527 878		97%
China	33 204	43 900	457 170	310 929	20%	608%
Madagascar	-	-	426 011	266 000	17%	
Thailand	27 366	16 222	335 287	213 915	14%	1219%
Netherlands	866 847	294 398	523 155	208 897	14%	-29%
Belgium	386 635	75 866	394 552	75 011	5%	-1%
Zimbabwe	12 958	72 732	44 905	74 201	5%	2%
HS-090420 Fruits of the genera Capsicum/Pimenta, dried/crushed/ground						
TOTAL	5 664 965	4 874 032	10 626 185	4 450 397		-9%
India	2 618 489	1 942 878	4 929 711	2 206 444	50%	14%
China	912 777	764 722	2 102 019	862 975	19%	13%
Zimbabwe	804 688	1 254 157	1 633 144	634 167	14%	-49%

	2007		2011		Percentage of total 2011 (volume)	Growth 2007 - 2011 (volume)
	Value: US\$	Volume: kg	Value: US\$	Volume: kg		
Peru	35 274	24 000	966 008	340 144	8%	1317%
Spain	33 340	5 520	391 512	182 283	4%	3202%
Malawi	454 171	295 013	201 078	73 420	2%	-75%
HS-091010 Ginger						
TOTAL	1 275 670	1 547 287	3 177 428	1 610 152		4%
China	535 468	895 997	1 424 501	1 044 575	65%	17%
Nigeria	411 970	322 618	650 389	261 628	16%	-19%
India	24 069	26 281	697 434	169 410	11%	545%
Viet Nam	3 017	393	187 954	42 000	3%	10587%
HS-180400 Cocoa butter, fat & oil						
TOTAL	22 119 070	4 887 408	18 600 517	4 046 203		-17%
Singapore	638 486	128 368	7 979 599	1 693 390	42%	1219%
Malaysia	12 017 868	2 536 923	3 971 631	860 304	21%	-66%
Thailand	1 473 376	280 000	3 434 683	720 000	18%	157%
Nigeria	2 225 034	450 125	1 805 040	418 770	10%	-7%
Indonesia	792 602	180 000	612 795	162 349	4%	-10%
HS-200599 Vegetables & mixtures of vegetables, prepared/preserved otherwise than by vinegar/acetic acid, not frozen						
TOTAL	2 324 019	1 763 951	3 119 308	2 137 758		21%
Italy	752 812	317 547	1 569 122	1 124 388	53%	254%
Spain	315 986	147 674	474 531	187 295	9%	27%
Thailand	297 618	349 971	121 235	138 487	6%	-60%
China	41 486	105 076	86 918	130 528	6%	24%
Germany	114 304	101 382	124 896	94 375	4%	-7%
France	71 708	64 220	126 775	87 378	4%	36%
HS-200799 Preparations of fruit (excl. citrus fruit; excl. homogenized), obtained by cooking, whether/not containing added sugar/other sweetening matter						
TOTAL	2 222 882	1 268 625	3 548 629	1 517 487		20%
Poland	155 119	89 669	960 951	452 261	30%	404%
Kenya	-	-	382 202	265 310	17%	

	2007		2011		Percentage of total 2011 (volume)	Growth 2007 - 2011 (volume)
	Value: US\$	Volume: kg	Value: US\$	Volume: kg		
France	720 965	182 713	1 040 669	220 525	15%	21%
Denmark	632 491	391 267	304 306	163 622	11%	-58%
Egypt	1 431	8 042	189 121	128 390	8%	1496%
USA	4 057	1 910	166 276	69 194	5%	3523%
Colombia	-	-	59 810	55 200	4%	
HS-200899 Edible parts of plants, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.						
TOTAL	5 832 638	3 630 632	9 431 977	5 176 516		43%
China	769 708	985 261	1 455 558	1 265 867	24%	28%
USA	482 062	116 517	4 442 343	1 018 656	20%	774%
Costa Rica	93 063	184 054	595 482	938 461	18%	410%
Thailand	457 512	413 135	1 028 632	571 692	11%	38%
Ecuador	130 698	80 030	280 786	492 419	10%	515%
Philippines	141 497	123 600	271 044	139 221	3%	13%
Argentina	-	-	58 992	82 658	2%	
HS-200980 Juice of any single fruit/vegetable, unfermented & not containing added spirit, whether/not containing added sugar/other sweetening matter						
TOTAL	7 557 307	4 000 202	9 044 711	4 911 561		23%
China	874 536	659 819	2 572 336	1 720 493	35%	161%
Mexico	291 498	286 900	1 301 475	1 128 300	23%	293%
Thailand	154 308	170 494	174 727	188 462	4%	11%
Colombia	237 825	238 070	182 458	172 240	4%	-28%
FISHERIES						
HS-030499 Fish fillets & other fish meat (excl. of 0304.11-0304.29, whether/not minced),n.e.s.						
TOTAL	2 615 054	1 406 098	2 457 048	893 511		-36%
Argentina	828 487	483 359	1 298 341	478 708	54%	-1%
Norway	210 752	168 980	275 441	152 440	17%	-10%
Viet Nam	-	-	146 794	72 000	8%	
Zimbabwe	55 260	15 297	342 190	57 686	6%	277%
China	23 959	20 238	108 407	41 040	5%	103%

	2007		2011		Percentage of total 2011 (volume)	Growth 2007 - 2011 (volume)
	Value: US\$	Volume: kg	Value: US\$	Volume: kg		
HS-030613 Shrimps & prawns, whether/not in shell, frozen						
TOTAL	38 484 682	7 313 487	60 449 090	9 049 622		24%
India	24 988 685	4 649 033	35 699 242	5 178 286	57%	11%
Thailand	4 535 552	898 478	10 036 657	1 602 806	18%	78%
Ecuador	1 008 519	180 902	3 553 891	584 302	6%	223%
Mozambique	3 053 553	587 349	2 819 908	519 015	6%	-12%
Argentina	128 841	24 736	3 561 733	514 653	6%	1981%
HS-160413 Sardines, sardinella & brisling/sprats, prepared/preserved, whole/in pieces (excl. minced)						
TOTAL	21 795 408	11 170 297	61 742 398	30 882 094		176%
Thailand	18 340 470	10 326 786	51 379 632	26 966 224	87%	161%
China	74 420	15 237	5 689 749	3 017 300	10%	19702%
Philippines	128 983	101 231	2 952 828	509 813	2%	404%
HS-160419 Fish (excl. of 1604.11-1604.16), prepared/preserved, whole/in pieces (excl. minced)						
TOTAL	5 557 247	3 983 820	1 558 557	450 339		-89%
Thailand	90 187	27 565	1 217 257	390 185	87%	1316%
USA	-	-	152 989	28 768	6%	
Malaysia	-	-	179 288	26 695	6%	
HS-160420 Prepared/preserved fish other than whole/in pieces						
TOTAL	1 053 923	564 268	3 047 350	1 075 058		91%
China	258 086	241 735	714 806	474 450	44%	96%
Uruguay	-	-	1 272 644	343 333	32%	
Thailand	185 129	137 630	325 583	76 866	7%	-44%
United Kingdom	1 669	159	43 600	67 651	6%	42448%
New Zealand	366 520	143 325	154 679	55 370	5%	-61%
Viet Nam	-	-	320 628	24 719	2%	

The South African market for imported frozen shrimp and prawn is dominated by four countries: India, Thailand, Malaysia and Mozambique. Between them, these three countries accounted for 92% of the both the value and volume of imports in 2009. The source of imports reflects the key characteristic of the competitive product. India is the main supplier of imported prawns supplying a little over half of the volume of frozen prawns consumed in South Africa on an annual basis. The prawns from India are the lower value cultivated black tiger prawns which is where the bulk of the South African demand lies. The prawns from Thailand are better quality freshwater prawns as are the prawns from Mozambique. These products have a smaller share of the overall market. The market in South Africa is therefore principally for the cheaper prawn which satisfies demand in the middle income market. It is also interesting to note the inroads that Ecuador has made into this market given extensive marketing of the country and its product by a newly established trade office.

Thailand dominates the canned fish import market. One of the primary reasons for this is the low cost of labour in Thailand which ensures a reasonable priced finished product. Another key factor in Thailand's dominance is that the National Regulator for Compulsory Standards (NRCS) has an agreement with the standards authorities in Thailand under which the Thai Authority checks factory compliance on behalf of the NRCS. This ensures that South Africa is getting a quality product and reduces the volume of products that are non-complaint. Essentially, the system of canned fish imports from Thailand is well established and it works for both the local importers in terms of price and for the local authority in terms of compliance with the compulsory specification.

2.3.5 Preferential tariffs of competitors

South Africa is a member of the **Southern African Customs Union** (SACU) along with Botswana, Lesotho, Namibia and Swaziland. Goods are traded within the customs union free of duty.

South Africa is a member of the **Southern African Development Community**¹ (SADC). Under the SADC Trade Protocol implemented in September 2000, South Africa agreed to reduce tariffs on

¹ Other members are Angola, Botswana, DRC, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Swaziland, Tanzania, Zambia and Zimbabwe.

goods originating in SADC member states to zero over a period of 8 years. The tariffs from goods originating in SADC are therefore currently zero.

The **EU/SA Free Trade Agreement** came into effect in January 2000. In terms of the agreement, the EU reduced its import tariffs to zero over a period of 7 years. South Africa undertook to reduce her duties to 50% of the MFN tariff level over an 8-year period. The current rate on fish from the EU is indicated in the table above.

The SACU agreement with the **European Free Trade Association (EFTA)** member countries² came into effect on 1 January 2007. The Agreement covers trade in industrial goods, including fish and other marine products, and processed agricultural products. Trade in basic agricultural products is covered by individual bilateral agreements with the SACU States. On implementation, EFTA states abolished all duties on goods originating in SACU and SACU has agreed to a progressive reduction of all tariffs. The tariff on goods from EFTA is shown in the table above.

2.4 Regional Demand

In 2011, the SADC region outside of South Africa imported US\$4192.2 million of the products reflected in this report. Across the 14 countries within the SADC region this represents a relatively small market given that South Africa's imports are US\$253 million. This reflects the nature of these economies and the levels of poverty within the countries which results in reduced consumer spending on luxury items such as prawns, fresh fish or processed artichokes.

There are however three product categories where there is some opportunity: dried beans and peas and canned sardine. Together these two categories account for 56% of the value of imports in 2011.

² Norway, Switzerland, Lichtenstein and Iceland

Table 7: SADC's Imports of Selected Products, 2007 to 2011

HS Code	Description	2007 Value: US\$	2011 Value: US\$	Growth 2007 to 2011
AGRO				
071333	Kidney beans, incl. white pea beans (<i>Phaseolus vulgaris</i>), dried, shelled, whether/not skinned/split	12 473 369	45 144 522	262%
071339	Beans (<i>Vigna</i> spp., <i>Phaseolus</i> spp.), dried, shelled, whether/not skinned/split	34 831 726	21 831 960	-37%
081190	Fruit & nuts, n.e.s., uncooked/cooked by steaming/boiling in water, frozen, whether/not containing added sugar/other sweetening matter	198 433	242 186	22%
090420	Fruits of the genera <i>Capsicum</i> / <i>Pimenta</i> , dried/crushed/ground	954 223	1 306 141	37%
091010	Ginger	197 301	496 315	152%
180400	Cocoa butter, fat & oil	187 214	144 435	-23%
200599	Vegetables & mixtures of vegetables (excl. of 2005.10-2005.91), prepared/preserved otherwise than by vinegar/acetic acid, not frozen	3 595 892	10 394 814	189%
200799	Preparations of fruit (excl. citrus fruit; excl. homogenized), obtained by cooking, whether/not containing added sugar/other sweetening matter	5 277 303	7 667 916	45%
200899	Edible parts of plants, prepared/preserved, whether/not containing added sugar/other sweetening matter/spirit, n.e.s.	947 989	5 570 830	488%
200980	Juice of any single fruit/vegetable (excl. of 2009.11-2009.79), unfermented & not containing added spirit, whether/not containing added sugar/other sweetening matter	13 267 764	37 540 218	183%
FISHERIES				
030499	Fish fillets & other fish meat (excl. of 0304.11-0304.29, whether/not minced),n.e.s.	13 422 123	1 043 933	-92%
030613	Shrimps & prawns, whether/not in shell, frozen	3 826 862	8 212 216	115%
160413	Sardines, sardinella & brisling/sprats, prepared/preserved, whole/in pieces (excl. minced)	39 998 630	32 653 231	-18%
160419	Fish (excl. of 1604.11-1604.16), prepared/preserved, whole/in pieces (excl. minced)	6 792 661	11 948 354	76%
160420	Prepared/preserved fish other than whole/in pieces	3 861 058	7 954 930	106%
Grand Total		139 832 548	192 152 001	37%

Source: Based on COMTRADE data

Within the region, the actual markets differ considerably as shown in Table 8. Angola is the largest market accounting for 54% of total imports and reflecting growth in the value of imports of 70% across a 5 year period. The second most important market is the DR Congo (13% of value in 2011), followed by Mauritius (11%).

It is important to note when looking at these statistics that the countries that comprise SACU, namely Botswana, Lesotho, Namibia and Swaziland tend to under-report levels of imports due to the fact that they are part of the Southern African Customs Union and South Africa, being the largest supplier of goods into these economies, does not report directly on this trade.

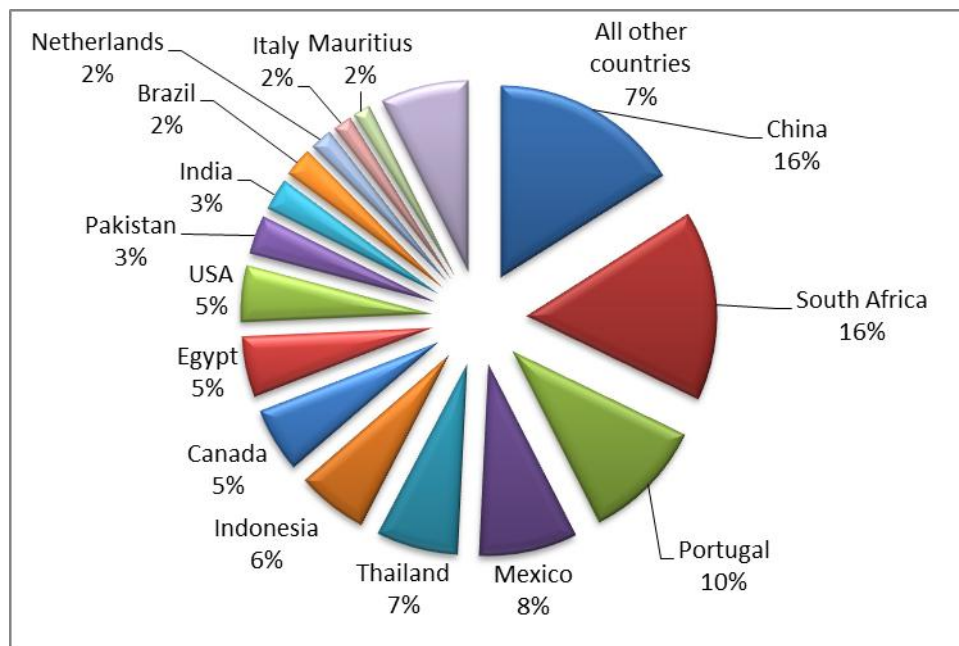
Table 8: SADC’s Imports of Selected Products by Country

Destination	2007 Value: US\$	2011 Value: US\$	Percentage of total	Growth 2007 to 2011
Angola	61 034 642	103 735 576	54%	70%
Botswana	158 086	316 687	0%	100%
Dem. Rep. of the Congo	25 840 938	24 084 989	13%	-7%
Lesotho	1 204 133	-	0%	-100%
Madagascar	2 272 972	3 765 896	2%	66%
Malawi	1 969 708	1 728 671	1%	-12%
Mauritius	16 649 199	20 940 994	11%	26%
Mozambique	6 198 977	12 342 866	6%	99%
Namibia	1 362 508	3 749 990	2%	175%
Seychelles	1 067 946	1 572 187	1%	47%
Swaziland	263 607	21 051	0%	-92%
Tanzania	5 626 312	4 454 661	2%	-21%
Zambia	3 672 708	4 757 994	2%	30%
Zimbabwe	12 510 812	10 680 439	6%	-15%
Grand Total	139 832 548	192 152 001	100%	37%

Source: Based on COMTRADE data

China and South Africa are the top sources of imports of the selected products into the SADC region. Portugal is in third position followed by Mexico. Together, these four countries accounted for 50% of the value of trade in 2011. An examination of the statistics shows that China is primarily a supplier of dried beans and peas. South Africa’s key exports to the region are fruit juice and canned sardines. Some 92% of Portugal’s exports to the region are destined for Angola. This reflects the position that the country still maintains as the ex-colonial power in Angola. Mexico is solely a supplier of dried beans and peas.

Figure 2: Top 15 Suppliers of Selected Products to the SADC Region, 2011



Source: Based on COMTRADE data

Peru supplies small quantities of these products to the SADC region. In 2011, total exports of these products from Peru to SADC amounted to US\$1.4 million. The range of products is limited covering a small amount of dried beans and canned fish. There is certainly room for growth into these markets and a Peruvian exporter would need to decide whether to do this directly or via an agent in South Africa.

Table 9: Peru’s Exports of Selected Products to SADC

Product and Destination	2007: Value: US\$	2011: Value US\$
HS-071339: Beans (<i>Vigna spp.</i>, <i>Phaseolus spp.</i>), dried, shelled, whether/not skinned/split	79 840	130 900
Mauritius		130 900
Seychelles	79 840	
HS-160419: Fish prepared/preserved, whole/in pieces (excl. minced)	978 701	957 831
Angola	219 871	723 540
Dem. Rep. of the Congo	532 892	
Mauritius	175 718	94 791
United Rep. of Tanzania	50 220	139 500
HS-160420: Prepared/preserved fish other than whole/in pieces		286 110
Angola		152 520
Mauritius		133 590
Grand Total	1 058 541	1 374 841

Source: Based on COMTRADE data

3.0 Analysis of the Sector

3.1 Channels of Distribution

3.1.1 Agro

Fresh Produce

Distribution channels for fresh fruit grown in South Africa are simple, and commercial farmers supply their produce either directly to the large retailers that they are contracted to or to the fresh produce markets around the country. Some of the smaller farmers also supply directly to wholesalers and retailers in the major metropolitan areas, and to retailers in the districts in which they grow produce.

The key retailers' contract the growers directly, have fresh produce procurement and distribution divisions that source all their fresh fruit and vegetable requirements, or make use of independent importers and suppliers. Pick n Pay has a number of selected suppliers/growers that are responsible for the supply of fresh fruit and vegetables. These companies have a contract to supply Pick n Pay's fresh produce needs for the contracted period and it is their responsibility to sub-contract smaller growers and import fruit and vegetables where necessary. All sub-contracted suppliers must provide Pick n Pay with an import certificate.

Freshmark, Shoprite's fruit and vegetable procurement and distribution arm, has become the biggest operation of its kind in Africa, and is responsible for the sourcing of all fresh produce for the group both in South Africa and the rest of Africa. Approximately 95% of all fruit and vegetables are obtained directly from 550 growers in South Africa. Freshmark has six distribution centres in South Africa, and new ones are planned for Durban and Port Elizabeth.

Woolworths subcontracts the procurement of fruit and vegetables to a handful of suppliers and importers, who source fresh fruit for the Woolworths group from a variety of local and international destinations. Generally they import fruit and vegetables during the off-season and the decision would be based on the out-of-season availability, quality and transport times. Two of the key fresh produce suppliers to Woolworths are Peninsula Horticulture whose core business is supplying local and exotic fruit, vegetables, salads and organic produce to retailers, and Fruits, who import fresh fruit for the Woolworths group from a variety of international destinations. Fresh produce needs to be flown in either daily or second-daily, delivered to the central

distribution depots from where the produce is delivery by road to stores. Woolworths has subcontracted all its refrigerated transport to company called Fast 'n Fresh which is part of the Imperial Group.

Spar Fresh fruit and vegetables are branded under the label “Fresh Lines” and these are purchased and packaged centrally. Spar buys through a number of selected suppliers, including both growers and middlemen. Spar does not import any fruit and vegetables directly and their suppliers would buy imported/out-of-season fresh produce from the fresh produce agents and markets.

Prepared Fruit & Vegetables

Almost all processed fruit is sourced locally, or from the neighbouring states of Mozambique, Zimbabwe, and Zambia, and the processors supply the local market directly. The contracts with the manufacturers are usually signed at the beginning of the season, and the processed fruit will be supplied at a set price throughout the year. Small quantities of processed fruit and pulps are imported into South Africa if there is a shortage of local supply or if the imported price is cheaper than the local product.

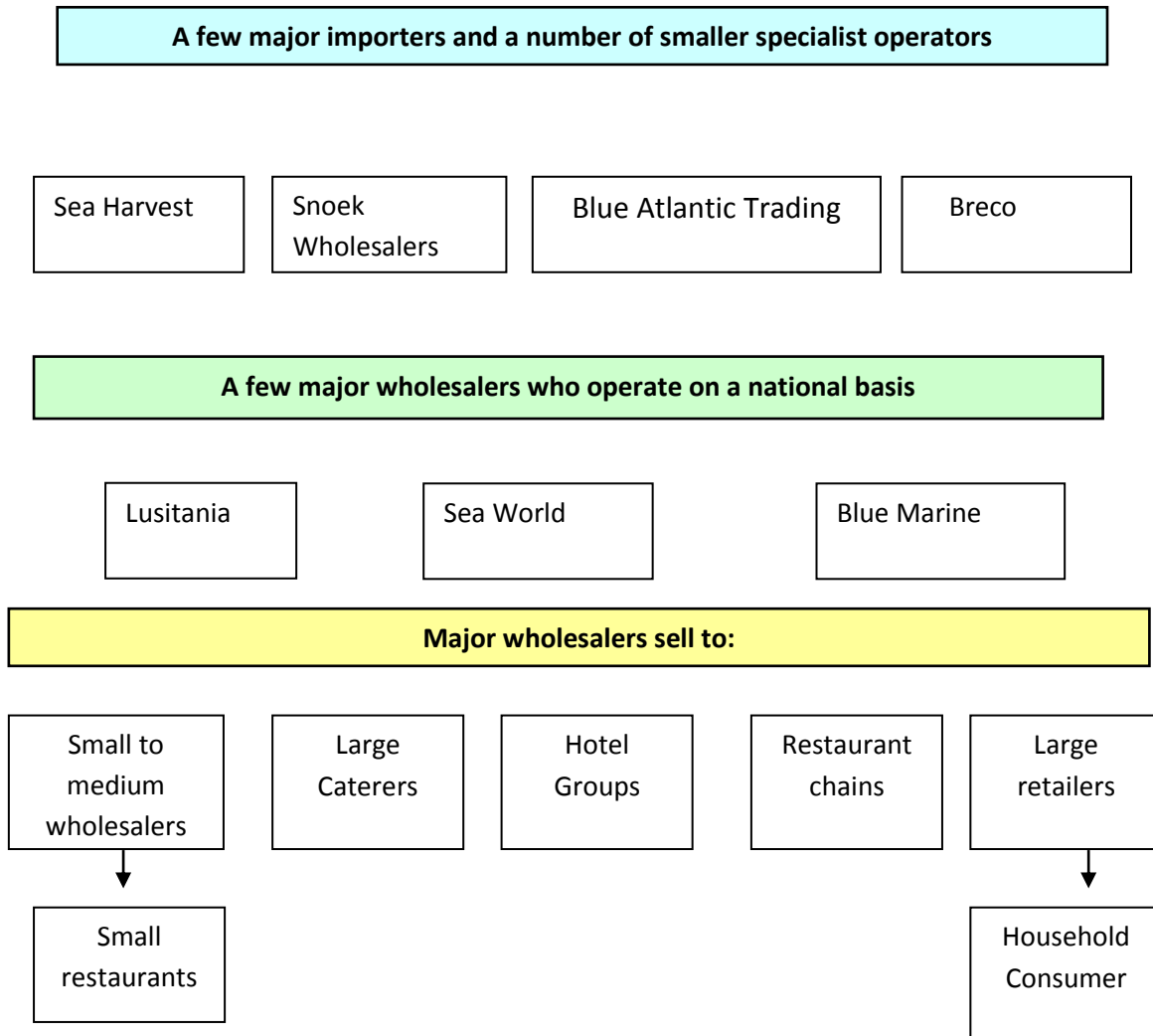
Dried Beans

Primary producers of dried beans supply either directly to a canner or pre-packer or access these two channels via a broker. Specialist importers supply directly to the canners. Pre-packers generally import their requirements directly.

3.1.2 Fisheries

The distribution channels for fish in South Africa are relatively simple. A single channel marketing system has developed amongst the primary processors of fish. These companies catch and process the fish and have developed their own cold storage and distribution networks to support their primary operations. These are often fully integrated marketing and merchandising operations that handle distribution to the retail sector on behalf of themselves and other companies.

In terms of imported fish and fish products, the distribution system can simplistically be outlined as follows:



The large importers are involved in large-scale distribution of fish and fish products. These companies will purchase whatever product is available locally and then import the remainder of their requirements. This generally involves large quantities of a wide variety of fish on an annual basis. Their principal customers are the major wholesalers and to a smaller extent the formal retail sector and the smaller regional wholesalers. Certain of these importers also have an on-going relationship with the restaurant chains to supply their fish requirements directly on a daily basis.

There are also a number of smaller importers operating in South Africa. These importers tend to specialise in a certain product or in imports from a certain geographical area. Some of these importers are involved solely in imports of high value items such as Norwegian salmon for small

niche markets or king and queen prawns from Madagascar for selected restaurants in Johannesburg. These smaller importers sell to the wholesalers or directly to the retail or restaurant trade.

There are about forty wholesalers of fish in South Africa. There are three key players who operate on a national basis and the rest generally operate regionally. The three key wholesalers generally have a large requirement for imported fish, but prefer to purchase their requirements from the specialist importers as opposed to importing directly. The wholesalers generally only import high value product where they believe there is no room for an importer's margin. Products in the category include certain high quality squid, sole and prawns. The large wholesalers are supplying restaurants, hotels, catering companies and the smaller wholesalers.

The smaller wholesalers will very seldom import directly. These companies operate a fairly direct business, supplying fish to restaurants on a daily basis. They rely on the larger wholesalers to supply their requirements.

The large retailers have different methods of procurement. One of the large retailers has appointed one of the large importers as their sourcing agent and this company is responsible for the delivery of fish to a central distribution point. Another large retailer has given a smaller wholesaler the contract to operate it's in store fish markets.

The restaurant chains are important outlets for fish especially items such as prawns, sole and calamari (squid). The food services industry in South Africa is fragmented and there are around 25,000 outlets consisting of hotels, restaurants, fast-food franchises and contract catering companies. Generally the restaurant chains have different methods of procurement, which generally involve both the direct importers and the wholesalers. In most cases procurement for all restaurants within a group is done on a centralised basis and then the supplier is required to deliver product to a central regional point.

There are a number of franchised fish and seafood restaurants in South Africa. The main ones are:

Something Fishy: <http://www.goodthings.co.za/somfishymenu.htm>

Ocean Basket: <http://www.oceanbasket.co.za/>

John Dory's: <http://www.johndorys.co.za/>

Fish Aways: <http://www.fishaways.co.za/>

Cape Town Fish Market: <http://www.ctfm.co.za/>

Jimmy’s Killer Prawns: <http://www.jimmyskillerprawns.za.net/>

Fish Monger: <http://www.fishmonger.co.za/>

The distribution channels for canned fish are relatively simple and given the stringent health and safety specifications, the channel is controlled by a few key players. The most important company is Oceana Brands that enjoys an estimated 75% share of the local canned fish market. This company is also responsible for most of the country’s exports to Africa. Oceana have their own canning facilities but import canned pilchards, sardines and tuna directly to meet local demand. Oceana distribute directly to major wholesalers such as Makro and Trade Centre and to the distribution centres of the major retailers. The company also distributes to the food service sector via centrally placed distribution centres.

This is a fairly typical distribution channel for canned fish. Patleys who own and distribute the Goldcrest range of products have the following system:

SUPPLIERS				
↓				
Speciality Distributors	Cash & Carry Wholesalers	Formal & Informal Tenders	Industrial Re-Users	Retail
Distribute Direct: National Key- Accounts Hotels Restaurants Canteens Fast Foods Industrial Catering	Servicing of all customers who prefer to purchase at Wholesalers. Certain Cash & Carry Wholesalers offer a delivery.	The tendering and servicing of all informal State Tenders where we can be price competitive and are able to deliver to with efficiency.	All Manufacturers of products, that need raw materials and ingredients to make up the final product and then sell.	All Retail Chain Stores, Including Independent Outlets.
No. of Outlets 500	No. of Outlets 457	No. of Outlets 250	No. of Outlets 150	No. of outlets 2,200

Source: Patley’s website

Although the major retailers (Pick ‘n Pay, Shoprite/Checkers, Spar and Woolworths) provide the most important outlet to consumers, they will seldom import these products directly, preferring to operate through a local supplier such as Oceana or Foodcorp or a specialist importer and



distributor such as Patleys or Ocean King. This stands for own brands which are sourced through companies such as Humboldt Trading or Monteagle Africa.

Depending on the size of the importer, volumes can be important. The larger importers such as Oceana Brands deal in high volumes and demand ready availability from suppliers. The high volume purchasers generally tend to be less fussy about fishing methods (e.g. pole-caught) as it is difficult to get the required volumes using these methods.

Generally products are landed pre-packed and ready for sale to the wholesalers and retailers. This would mean the cans would be packed on trays of 12 to 24 units and shrink-wrapped in plastic. The photo alongside illustrates a typical 24 pack of pilchards ready for delivery to the retail and wholesale sector. In most instances, the major purchasers in South Africa have their own brands and foreign suppliers will be required to pack under the importers label. This applies to the major retailers who all have their own brand ranges of canned fish (see photo on page 39 for the SPAR range)



The canned fish market is extremely competitive and importers are constantly looking for ways to differentiate from competitors. In addition to the basic variables on canned fish i.e. packed in tomato sauce, with chilli, with hot chilli, with beans etc., Ecuadorian exporters will gain attention by offering different varieties that would differentiate a brand on the shelves of South African retailers.

3.1.2 Retail channel



Turnover (year ended 30 June 2011)	R 72.3 billion
Employees	99,000 (11,000 of which are outside South Africa)
Market Share	36%
Store type and Ownership	1303 corporate and 427 franchise outlets in 17 countries across Africa and the Indian Ocean Islands.
Product Range	Food and beverage products, general household merchandise, wines and liquors, health and beauty, furniture
Consumer Demographics	Various store formats within the Group cater for all income groups with the Checkers, Checkers Hyper and House & Home stores focussing on the higher income groups (LSM ³ 8-10) and Shoprite and OK Furniture focussing on the broad middle to lower market (LSM 4-7). Shoprite Usave focuses on the lower-end of the market (LSM 1-5). Market positioning is provision of food and household items in a first-world shopping environment at the lowest possible prices
Buying Practices	Procurement of imported food and beverages is centralised through a procurement unit at head office in Cape Town. There is also a centralised unit for procurement for stores across Africa.

³ The SAARF Living Standards Measure (LSM): a widely used segmentation tool in South Africa as it has the means of segmenting the market according to their living standards. 1 represents the lowest level and 10 the highest.



Turnover (year ended 28 February 2012)	R 55.3 billion
Trading Area	1.2 million m ²
Employees	42,000
Market Share	28%
Store type and Ownership	<p>847 stores across the following formats:</p> <ul style="list-style-type: none"> ■ 20 Hypermarkets ■ 174 Supermarkets ■ 282 Supermarkets (Franchise) ■ 9 Express Franchise (food only) ■ 117 Liquor ■ 85 Liquor Franchise ■ 25 Pharmacy ■ 62 Clothing ■ 12 Clothing Franchise ■ 99 Boxer supermarkets ■ 13 Boxer Hardware stores ■ 8 Boxer Liquor Stores ■ 9 Boxer Punch Stores <p>Opening 111 stores in 2012/13 financial year</p>
International Footprint	<ul style="list-style-type: none"> ■ Mozambique: 1 ■ Botswana: 9 ■ Zimbabwe: 50 ■ Namibia: 17 ■ Lesotho: 1 ■ Zambia: 4 ■ Mauritius: 2 ■ Swaziland: 1 <p>Plans to open in DR Congo and Malawi</p>
Product Range	Across all formats of stores, the product range is diverse and includes food, wines and spirits, general household merchandise, home improvement supplies, pharmaceuticals, health and beauty, clothing and footwear.
Consumer Demographics	Wide-ranging. Compete on price and “the shopping experience” which is positioned as easy and friendly, a store for each occasion. Traditional market is LSM 6-8
Buying Practices	<p>Generally purchase on a decentralized basis, which means that buyers in each of the 6 main regions will purchase products for their respective retail outlets.</p> <p>Centralising distribution by 2017 in each of the regions.</p> <p>Currently 36% of grocery distribution, 25% of perishables and 33% of frozen produce is centralised</p>



Turnover (year ended 30 September 2011)	R38.8 billion
Market Share	28%
Store type and Ownership	1635 stores across the following formats: <ul style="list-style-type: none"> ■ 275 SuperSpar (selling area of 1,300m²+) ■ 446 Spar (selling area of 700m²+) ■ 138 KwikSpar (selling area between 300m² and 700m²) ■ 501 Tops Liquor Stores ■ 269 BuildIt ■ 6 Spar Pharmacy
International Footprint	Distribute to SPAR stores in Swaziland, Botswana, Lesotho, Mozambique and Namibia. Wholesale goods to stores in Zambia, Malawi and Zimbabwe.
Product Range	Premium alongside value. SPAR stores stock a full range of food and beverage products. There is a big disparity in merchandising between SPAR stores as store owners tend to merchandise for the demographics of the area they serve. Purchasing from local suppliers tends to give each SPAR a unique feel.
Consumer Demographics	Traditionally market to the middle to upper income consumers (LSM 6 to 10)
Buying Practices	SPAR operates under "voluntary trading" principles which means that SPAR retailers can take advantage of the Group trading power but retailers are also free to source goods from local manufacturers and traders. Procurement is done at both a national and regional level by SPAR Group The SPAR Group operates 7 distribution centres including a group import centre which is used primarily for BuildIt stores.



Turnover (year ended June 2011)	Retail group turnover 22.6 billion of which R13.5 billion is food (60%)
Trading Area	541,984m ² (of which food is 135,552m ²)
Market Share	8% share of the retail food market
Store type and Ownership	<p>446 Woolworths stores in total (389 in South Africa) in the following formats:</p> <ul style="list-style-type: none"> ■ 320 corporate stores ■ 26 SA franchise ■ 43 Engen franchise (forecourt store) <p>Of the corporate and franchise stores:</p> <ul style="list-style-type: none"> ■ 173 full line stores ■ 79 clothing stores ■ 151 food stores
International Footprint	<p>Aiming at 104 African stores by 2014.</p> <p>Currently 57 stores in 12 countries: Mauritius, Nigeria, Zambia, Tanzania, Uganda, Mozambique, Lesotho, Ghana, Kenya, Botswana, Namibia and Swaziland</p>
Product Range	<p>Premium focus product. Range of clothing, food and general merchandise, mainly under its own brand name. Products are similar in look and feel to Marks and Spencer Group UK.</p> <p>Could be a change in the range with the opening in April 2012 of Woolworths first supermarket in Johannesburg.</p>
Consumer Demographics	Upper end consumers (LSM 8-10)
Buying Practices	<p>Products are purchased on a centralised basis for the whole group through head office in Cape Town. Woolworths have specific buyers for every section of the food and related products market. Divisions include New Products, Longlife and Fresh products with buyers for each of the subsections of these categories.</p> <p>Woolworths is known in the industry to be the strictest retailer in terms of quality and standards and suppliers face rigorous testing.</p> <p>Woolworths operates their entire business around a programme called Good Business Journey which is a sustainability strategy incorporating fair trade and sustainable production.</p>



Turnover (2011/12)	Targeting sales of R10 billion by 2015
Market Share	2%
Store type and Ownership	Cambridge Food is South Africa's latest entrant into the retail grocery arena. Currently 25 stores with an additional 7 stores being built. A further 16 stores will be added from the acquisition of Rhino Cash and Carry bringing number of stores to a total of 48. Targeting 100 stores by 2015
International Footprint	None at present
Product Range	Fresh food – vegetables, meat, bakery and take-aways. Basic grocery items
Consumer Demographics	Lower end of the market (LSM 2-7). The company's website describes their customers as "characterised by high levels of unemployment, reliance on social grants as a primary source of income, and heavy dependence on taxis, trains and buses to travel between work and home." Stores are located on or nearby high traffic commuter nodes and densely populated residential areas.
Buying Practices	Buying through Masscash channels (Walmart). Centralised distribution system in place by July 2012.

3.1.3 Manufacturers

The large food manufacturers in South Africa generally have a centralized procurement division responsible for procurement of inputs for all divisions within the group. For example, Tiger Brands which encompasses five divisions manufacturing products ranging from tomato sauce to baby foods to sweets and biscuits has one central office which procures for all divisions.

These centralized procurement offices have relationships with the large local suppliers of inputs from whom they will purchase directly. For imported inputs, these companies will either utilise the services of one of the established local traders or brokers or they will enter into a direct relationship with the foreign supplier. Whether the company engages directly with an international supplier depends on the product in question. Bulk commodities such as beans, are generally procured through specialist traders. These trading companies have been in operation for a number of years and have established international linkages.

Certain inputs are procured directly from international suppliers by the manufacturers. For example, the larger dairy manufacturers would import fruit pulp directly.

3.2 Current trends in the sector and other issues of interest

3.2.1 Agro

Food services industry

The food service industry in South Africa is well developed and is the fastest-growing sector of the food market, fuelled by increased household incomes, a growing middle class and tourism. There are around 25,000 outlets consisting of hotels, restaurants, fast-food franchises and contract catering companies. The food service industry is often a sector that is overlooked by foreign suppliers but the buying power of this sector cannot be ignored.

Ripe & Ready Fruit

Over the past decade, the increased buying power of South African consumers has created a larger local consumer market for the niche market of “Ripe and Ready” fruit, and the market has grown as the consumers enjoys the luxury of buying fruit that can be used immediately. It is believed that the local market can absorb an increasing amount of ready-to-eat fresh fruit, depending on the price.

Supply of raw materials for the processing sector

The bulk of South Africa’s agri-food imports are of raw materials which are processed locally. These imports may be seasonal and the volumes imported depend on the success of the local crop. These imports are either handled by the large commodities traders who will then sell onto the local markets, or some of the larger manufacturers may procure directly from international suppliers where large volumes are required. South African importers demand good quality and competitive pricing levels. Reliability and a consistent source of supply are also important factors influencing buying decisions.

Niche Product Opportunities

The opening up of the South African economy over the past decade and a half has had a profound effect on the food and beverage market which is becoming increasingly sophisticated as the middle and upper income groups grow and tourism into South Africa increases. The growth of the black middle class has created a demand for a wider range of products both on the supermarket shelves and in restaurants. In addition, the growth of tourism to and from South Africa has increased demand for the variety of food on offer in the food service industry. As South Africans travel their taste in food becomes more sophisticated and incoming tourists are demanding greater variety in what they eat locally.

Green Issues

The South African market for 'green' products is growing quickly, albeit off a low base, and this growth is expected to continue into the foreseeable future. There are a small number of certified growers in South Africa and the South African range of organic products is limited. As a result, many organic products are imported.

Economic Downturn

The global economic downturn has affected South Africa as it has most markets, and as a result consumers facing hard times are likely to have been buying cheaper brands and options in an effort to save money where they can. Likewise, they will cut back on the luxury of eating and drinking out and will tend to consume more at home and at their place of work. This is also true for the purchasing of specialist fruit and vegetables, as well as for imported produce.

Consumption

South Africa's annual per capita consumption of selected agricultural products is illustrated below:

■ Potatoes:	31.26 kg/yr
■ Vegetables (excl potatoes):	44.44 kg/yr
■ Deciduous & sub-tropical fruit:	29.84 kg/yr
■ Citrus:	12.86 kg/yr
■ Dry Beans:	3.19 kg/yr

3.2.2 Fisheries

Depletion of the Local Fishery Resource

'Linefish' are amongst some of the most sought after fish species on the local South African market. These are fish that are traditionally caught using a hook and line from beaches and boats for recreational purposes, or by commercial fishers from linefish boats (ski-boats). Linefish include many species such as steenbras, seventy-four, musselcracker, snoek and yellowtail.

Many of South Africa's linefish species are over-exploited or have been fished out to the point of collapse due in part to historic over-fishing by foreign trawling fleets on the Agulhas Bank during the 1970s. In addition, until 1985 the fishery was oversubscribed and consisted of many participants with no catch restrictions.

In December 2000 the line fishery was declared to be in a state of crisis in the country. Following this, processes were introduced to reduce catch efforts giving over-exploited species the chance to recover. There are currently 450 traditional linefish rights holders, the majority of which are based in the Western Cape.

The line fisheries crisis has been supported by the launch in September 2009 of the Responsible Fisheries Alliance (RFA) by WWF South Africa and four major fishing industry participants, namely I&J, Oceana, Sea Harvest and VikingFishing. The alliance aims to ensure that all stakeholders in the industry understand and support the implementation of an ecosystem approach to fisheries management for South Africa's fisheries.

Southern African Sustainable Seafood Initiative (SASSI)

The Southern African Sustainable Seafood Initiative (SASSI) was initiated in November 2004 in order to inform and educate all participants in the seafood trade, from wholesalers to restaurateurs through to seafood lovers.

SASSI has three primary objectives:

1. Promote voluntary compliance of the law through education and awareness
2. Shift consumer demand away from over-exploited species to more sustainable options



3. Create awareness around marine conservation issues

SASSI has developed a list for consumers that explain which seafood species are legal and which are the more sustainable choices from South African seafood populations. Green species are the best choices as they can handle current fishing pressure better. Orange species should be considered with caution as they are either over-exploited, or from problematic fisheries. Red species are illegal to sell in South Africa, and some of them are specially protected.

SASSI encourages retailers and restaurants to sign a SASSI charter indicating that the company will respect the law and will purchase sustainable species. To date, Woolworths and Pick n' Pay have signed the SASSI Charter.

For a supplier from Peru this means that a foreign supplier will be evaluated in terms of their environmental record. For example, Woolworths will only buy hake from Marine Stewardship Council (MSC) approved suppliers. Foreign suppliers may also be asked to provide details on issues such as

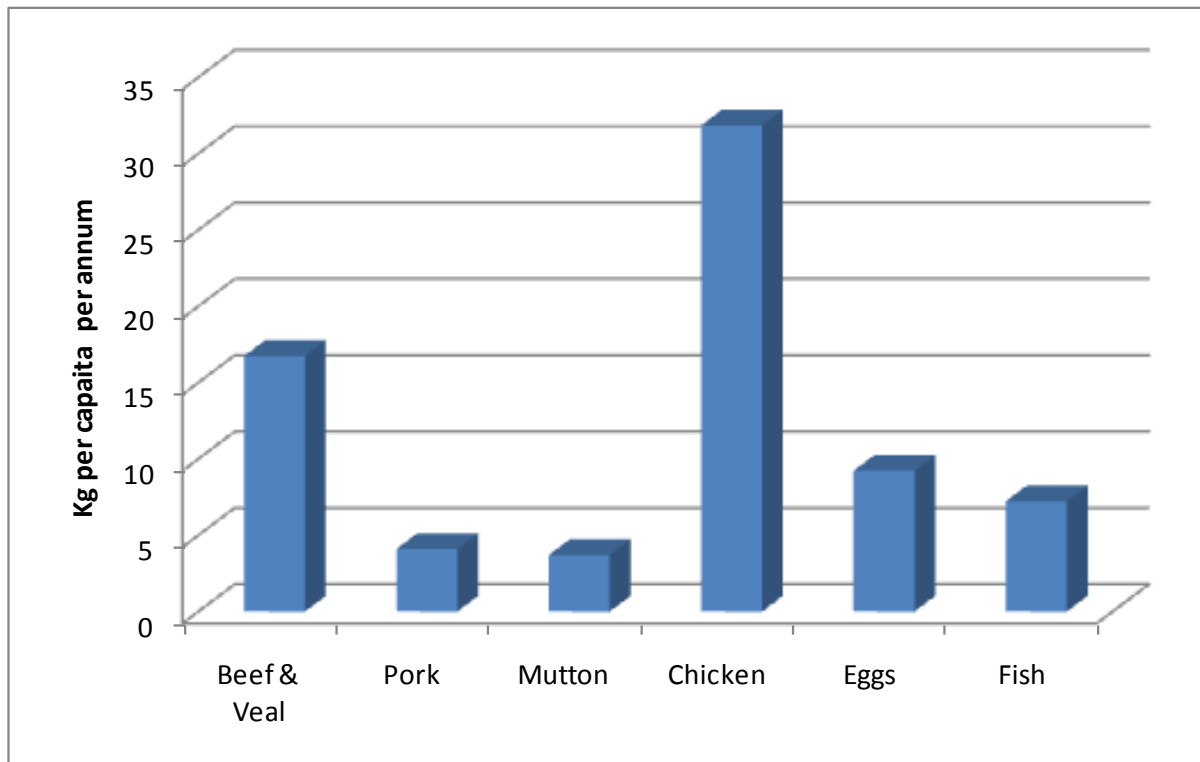
- Origin (country of production or FAO catch region)
- Production method (wild-caught/farmed and where possible fishing gear used)
- Any credible eco-labels that may apply

Per Capita Protein Consumption

The per capita consumption of fish products in South Africa is relatively low compared with that of other fishing nations. The pelagic fishery production, which is the largest by volume, forms the bulk of the fish production consumed locally. Pilchard or sardines in cans is a popular protein source and fishmeal production is utilised in the agricultural sector.

According to the Food and Agricultural Organisation (FAO), South Africa's consumption of fish is 7.23kg per capita per annum, almost one-third that of Peru's which FAO reports at 21.2kg per capita per annum. As illustrated in the chart below, per capita consumption of fish falls way below consumption of white and red meat as a protein source.

Figure 3: Protein Consumption in South Africa (2008/09)



Source: FAO and the National Department of Agriculture

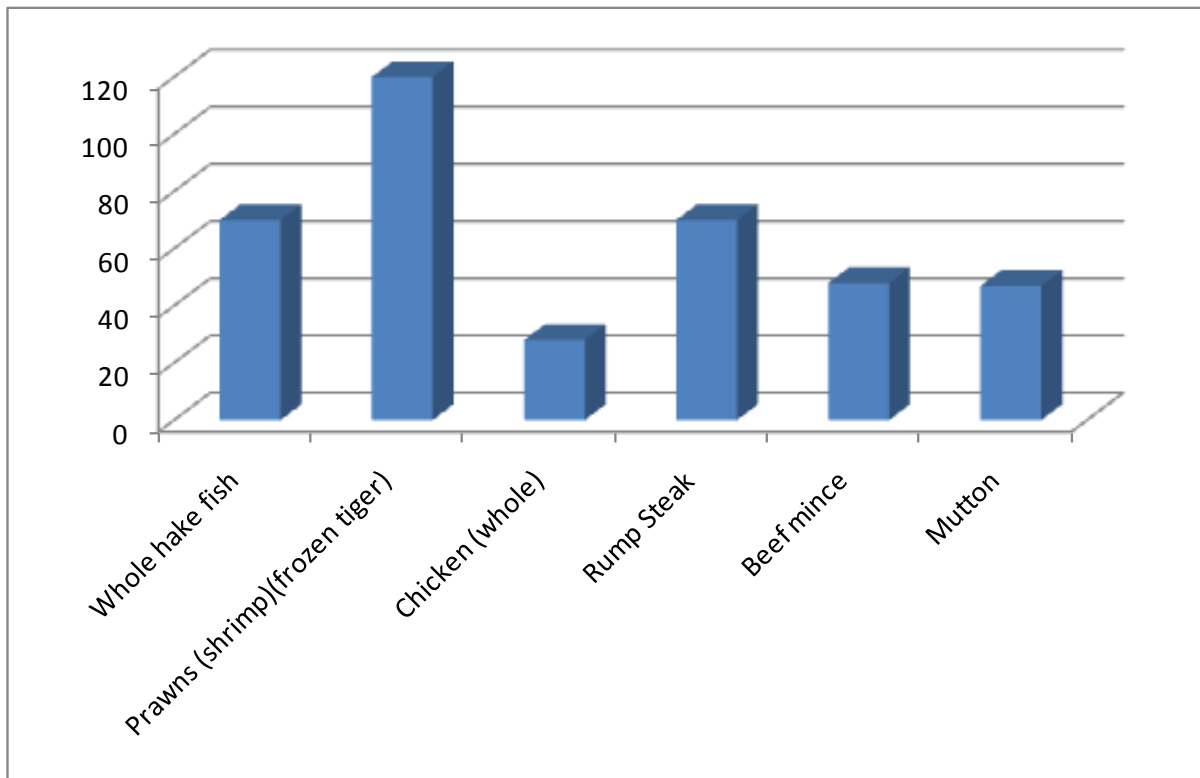
There are a number of reasons for South Africa’s relatively low consumption of fish. South Africa is not traditionally a fish eating culture with fish consumption predominantly the domain of the middle and upper income groups. The exception is canned pilchard and sardine. South Africa is one of the largest pilchard/ sardine eating nations in the world and canned sardine forms the staple diet for a large portion of the South African population.

Outside of the canned sardine market, the general fish eating population is not very discerning, with most South Africans eating hake and occasionally kingklip and sole, although both of the latter are labelled as “Orange” on the SASSI Guidelines. . There is minimal consumption of high value products such as lobster, large prawns, mussels and other crustaceans and molluscs, with consumption of these products occurring principally via restaurants and the catering trade. The traditional family restaurants cater for the middle income group consuming relatively large quantities of white fish, cheap calamari and the smaller prawns.

A second reason is that fish is considered expensive by the average consumer and there are cheaper protein sources available. As the following chart illustrates, the price of a basic fish is around the same as a good cut of red meat and way above chicken.



Figure 4: Comparative Pricing of Protein Sources



Source: Major food retailer

Buying Trends

Fish is purchased either processed and frozen (for example battered hake, hake in a cheese sauce or fish cakes etc.) or fresh, either whole or filleted. Generally, the more expensive or exotic fish is purchased fresh and not frozen. All supermarkets have ice chests selling basic frozen processed fish products and the larger outlets have fish markets where fresh line fish, calamari (squid), frozen prawns, crabs and other such delicacies are sold. There are also a number of specialist fish shops in and around the major cities where a wide variety of fish and seafood is available.

Although the fishing industry is centred in Cape Town, the principal market for fish in South Africa is Johannesburg in the Gauteng Province. Gauteng is the most economically powerful province housing 19% of the total population and accounting for 33% of national GDP and 35% of national household expenditure and yet only covering 1% of the total land area. The average income per capita of residents of Gauteng was 93 % higher than the national average for South Africa. It is often the case that Johannesburg restaurants have a wider range of fresher fish than their counterparts in Cape Town or Durban.

Fish consumption is seasonal. Most fish is consumed in the summer months with two peak months in November and December. The November peak reflects the demand from Johannesburg and the December peak reflects the demand from the coastal resorts as South Africans head to the coast for their Christmas vacation.

4.0 Analysis of Demand

4.1 Profile of final consumers

To understand consumer patterns, one needs to have a basic understanding of the South African consumer. A defining characteristic of the South Africa population is that income distribution is skewed with some 3.8% of the adult population earning 39.4% of total personal income⁴. Some 21 million South African adults are living on less than R5,000 per month (US\$625) and account for 65% of all South African households⁵.

The split of income across provinces is also very interesting. About US\$157 billion (65.6% of total personal income) is earned in three provinces, namely Gauteng, KwaZulu-Natal and the Western Cape. What is also interesting is that during 2009, only 13.1 % of all income accrued to rural dwellers indicating where the markets for imported and consumer products lie.

Table 10: Personal Income by Province and Income Group, 2009

Province	\$0- \$7150	\$7150- \$14300	\$14300- \$42850	\$42850- \$71500	\$71500- \$107k	\$107k+	Total	% of total
Eastern Cape	4 780	2 364	7 137	3 388	1 298	1 652	20 619	8.6
Free State	2 168	2 011	4 716	1 902	1 046	1 679	13 521	5.6
Gauteng	6 127	9 532	29 130	15 483	9 077	13 198	82 547	34.4
KwaZulu- Natal	6 618	5 746	13 685	5 549	3 254	3 923	38 775	16.2

⁴ Bureau of Market Research "Personal Income Patterns and Profiles for South Africa 2009", March 2010

⁵ Unilever Institute, University of Cape Town: The Majority Report 2012

Province	\$0-\$7150	\$7150-\$14300	\$14300-\$42850	\$42850-\$71500	\$71500-\$107k	\$107k+	Total	% of total
Limpopo	3 289	1 743	3 652	2 256	1 330	1 507	13 778	5.8
Mpumalanga	2 510	2 060	3 553	2 567	1 476	2 126	14 292	6
North West	2 476	2 305	5 265	2 106	1 551	1 417	15 120	6.3
Northern Cape	924	624	1 672	815	243	700	4 978	2.1
Western Cape	3 278	5 764	12 071	5 594	3 527	5 833	36 067	15
Total	32 169	32 149	80 881	39 659	22 803	32 036	239 696	
% of total	13.4	13.4	33.8	16.5	9.5	13.4		100

Source: Bureau of Market Research

For a foreign supplier of a luxury product such as prawns, this means that the actual percentage of the population that is able to afford the product is relatively small, probably in the region of 15%. These consumers are also clustered in Gauteng, Cape Town and Durban and it is these three centres that a foreign supplier should focus on.

4.2 Profile of importers

For the purposes of this research, 15 companies have been interviewed to establish product requirements, methods of procurements, quality requirements and other specific market information. The profiles are detailed below.

4.3 New technologies or developments in presentation, commercialisation

New technologies are generally found in the fish sector. A trend in the seafood industry is towards supplying far greater value-added product that offers better margins and importers are importing product in bulk, unprocessed form for further processing at local facilities. Examples of product falling into this category are prawn tails prepared specifically for the catering industry either shelled with tail still on or crumbed.

Value added products found at a Woolworths Store



The canned fish market is extremely competitive and suppliers are always looking at ways to differentiate their products. This has meant further value-addition to the basic products either in the additive i.e. with three bean salad or with lemon pepper; or in the ease of consumption.

The changes in the way that tuna is being packaged and presented are a good example. Suppliers are targeting the convenience food lunch market and more and more tuna products are appearing on the shelves in easy to open and ready prepared varieties such as the John West Lunch-to-Go product in the photo below which comes in water or in a sweet Thai sauce. The John West pouches are available with French dressing, with black pepper and with dried tomato.



5.0 Information of Interest

5.1 Import tariffs and other taxes

The framework of the external tariff is the 2-column Harmonised Commodity Coding and Description System (HS). Import duties are levied ad valorem on the fob value. Import duties on specified products are as follows (September 2012):

HS Code	Description	Rate of Duty			
		General	EU	EFTA	SADC
0811.90.15	Granadilla pulp; litchi pulp	5%	free	5%	free
0811.90.90	Other	20%	free	20%	free
090421	Fruits of the genera Capsicum/Pimenta, Dried, neither crushed nor ground:				
0904.21.10	Fruits of the genus Capsicum	25%	free	25%	free
0904.21.30	Fruits of the genus Pimenta	free	free	free	free
090422	Crushed or ground				
0904.22.10	Fruits of the genus Capsicum	25%	free	25%	free
0904.22.30	Fruits of the genus Pimenta	free	free	free	free
0910.11	Ginger, Neither crushed or ground	15%	free	15%	free
0910.12	Ginger, Crushed or ground	20%	free	20%	free
180400	Cocoa butter, fat & oil	free	free	free	free
2005.99.12	Pickles, mustard, chutney and like preparations:	6,6c/kg with a maximum of 25%	free	6,6c/kg with a maximum of 25%	free
2005.99.22	Lentils, cucumbers and gherkins:	4,15c/kg	free	4,15c/kg	free
2005.99.32	Sauerkraut:	4,15c/kg	free	4,15c/kg	free
2005.99.99	Other	20%	free	20%	free

HS Code	Description	Rate of Duty			
		General	EU	EFTA	SADC
200799	Other: Preparations of fruit obtained by cooking	30% or 4,5c/kg	free	free	free
2008.99.40	Tamarinds	free	free	free	free
2008.99.50	Ginger preserved in syrup, in immediate packings of a content of 45 kg or more	free	free	free	free
2008.99.60	Sweet corn (ZEA MAYS VAR. SACCHARATA)	5%	free	5%	free
2008.99.90	Other	5%	free	5%	free
200980	Juice of any single fruit/vegetable (excl. of 2009.11-2009.79)				
2009.81	Cranberry juice:				
2009.81.10	Concentrated, not containing added sugar or other sweetening matter, of a Brix value exceeding 45	20%	free	20%	free
2009.81.90	Other	20%	free	20%	free
2009.89.10	Kiwifruit juice,	20%	Free	20%	Free
2009.89.20	Pomegranate juice	20%	Free	20%	Free
2009.89.30	Cherry juice	20%	Free	20%	Free
2009.89.40	Passionfruit juice	20%	Free	20%	Free
2009.89.50	Other fruit juices	20%	Free	20%	Free
2009.89.60	Vegetable juices	25%	free	25%	free
071333	Kidney beans, incl. white pea beans (<i>Phaseolus vulgaris</i>), dried, shelled, whether/not skinned/split:				
0713.33.10	Seeds for sowing	10%	free	10%	free
0713.33.90	Other	10%	free	10%	free
071339	Beans (<i>Vigna</i> spp., <i>Phaseolus</i> spp., dried, shelled, whether/not skinned/split				
0713.39.10	Seeds for sowing	10%	free	10%	free
0713.39.90	Other	10%	free	10%	free
0304.99.10	Anchovies (<i>ENGRAULIS</i> SPP.); herrings (<i>CLUPEA HARENGUS</i> , <i>CLUPEA PALLASII</i>);	Free	Free	Free	Free

HS Code	Description	Rate of Duty			
		General	EU	EFTA	SADC
	blocks, rectangular, of a mass of 7 kg or more but not exceeding 8 kg, free of interleaving plastics (excluding blocks containing bones)				
0304.99.90	Other	25%	25%	9.5%	Free
0306.13	Shrimps & prawns, whether/not in shell, frozen	Free	Free	Free	Free
1604.13.05	Sardines (SARDINE PILCHARDUS), in oil, in airtight metal containers	2,4c/kg net	2,4c/kg net	free	free
1604.13.10	Sprats (SPRATTUS SPRATTUS), in oil, in airtight metal containers	2,4c/kg net	2,4c/kg net	free	free
1604.13.12	Sardinella (SARDINELLA SPP.), in airtight metal containers for human consumption	2,4c/kg net	2,4c/kg net	free	free
1604.13.15	Sardinella (SARDINELLA SPP.), in airtight metal containers	2,4c/kg net	2,4c/kg net	free	free
1604.13.17	Sardines (pilchards) (SARDINOPS SPP.), in airtight metal containers for human consumption	free	free	free	free
1604.13.20	Sardines (pilchards) (SARDINOPS SPP.), in airtight metal containers	free	free	free	free
1604.13.80	Other, frozen	25% or 200c/kg	25% or 200c/kg	free	free
1604.13.90	Other	6c/kg	6c/kg	free	free
1604.19.10	Frozen	25% or 200c/kg	25% or 200c/kg	9,5% or 76c/kg	Free
1604.19.20	Horse-mackerel (TRACHURUS TRACHURUS), in airtight metal containers, not frozen	6c/kg	6c/kg	Free	Free
1604.19.90	Other	6c/kg	6c/kg	Free	Free
1604.20.10	Fish paste	16,5c/kg with a maximum of 25%	16,5c/kg with a maximum of 25%	Free	Free
1604.20.20	Homogenised composite food preparations	Free	Free	Free	Free
1604.20.30	Other anchovies	25%	25%	Free	Free
1604.20.35	Other sardines (pilchards) (SARDINOPS SPP.) and sardinella (SARDINELLA SPP.), minced, in airtight containers for human consumption	6c/kg	6c/kg	Free	Free
1604.20.40	Other sardines (pilchards) (SARDINOPS SPP.), mackerel and horse-mackerel (TRACHURUS TRACHURUS), in airtight metal containers	6c/kg	6c/kg	Free	Free
1604.20.80	Other, frozen	25% or 200c/kg	25% or 200c/kg	9,5% or 76c/kg	Free
1604.20.90	Other	6c/kg	6c/kg	Free	Free

Source: SARS SCHEDULE 1, CUSTOMS, EXCISE AND SALES DUTIES AND SURCHARGE



Value-added tax of 14% is payable on all imports. VAT is levied on the value for customs duty i.e. the fob value plus 10% of the fob value plus any additional duties paid.

5.2 Specific import regulations

Generally, the following regulations apply to imports of all foodstuffs:

- Any foodstuff imported into or consigned to any place within South Africa shall bear a label stating any particulars specifically required
- Foodstuffs containing any food additive not permitted by regulation are prohibited
- Articles of food in unlabelled containers are prohibited
- All foodstuffs must be detained for inspection by the Port Health Officer

The International Trade Administration Act makes provision for control, through a permit system, of the import and export of goods specified by regulation. The primary function of the International Trade Administration Commission (ITAC) is the implementation of the provisions of the International Trade Administration Act (Act 71 of 2003) with regard to the issuing of import and export permits in terms of Section 6 of the Act and investigations and enforcement in terms of part E of the Act. The table below outlines the requirements in terms of ITAC permits for the products covered in this report.

When a product is subject to import control measures, the importers are required to apply for an import permit prior to importation. Import licenses are valid only for the calendar year in which they are issued. The license is only valid in respect of the goods of the class and country specified. It is non-transferable and may only be used by the person to whom it was issued.

Apart from the requirements of the ITAC Import Control Regulations the importation of a wide variety of goods is subject to inspection by other authorities and/or production of special permits/licences issued by these authorities or may be imported by certain authorities only.

As specified in the legislation and in the conditions of the import permits, all fish products (Chapter 3) require a compulsory inspection at the port of entry into South Africa by the Port Health Officer along with Port Quality Control and the South African Agricultural, Food,

Quarantine & Inspection Services (SAAFQIS). Samples will be taken and they are inspected for bacteria, odour, uniformity of size, general quality and to ensure that the product has been kept frozen at -20 degrees Celsius. The packaging is also inspected to ensure it meets with the compulsory standard. Health certificates for consignments of fish and fishery products complying with local regulations will be issued.

Table 11: Specific Import Regulations

Heading	Description	Prohibition or Restriction	Authority	Action required: DETAIN FOR	Competent Authority	Customs Mandate	Documentary Requirement
0304.99	Other:	Agricultural Plant and Inspection Services) APIS PHO - Port Health Section of the Dept. Of Health	Agricultural Pests Act No. 36/1983 Import Permit - Section 6 of ITAC Act, 2002 GG No. 31926 dated 27/02/2009	APIS PHO - Port Health Section of the Dept. Of Health	APIS (Agricultural Plant and Inspection Services) ITAC - Import Permit required (fish, frozen)	Endorse Permit	1. Import Permit required from ITAC 2. Permit from Directorate: Plant Health
0306.13	Shrimps and prawns:	03.06 – Import Permit required from ITAC - Schedule 1	Section 14, Act 54/1972 Agricultural Pest Act No. 36/1983 Import Permit - Section 6 of ITAC Act, 2002 GG No. 31926 dated 27/02/2009	APIS PHO - Port Health Section of the Dept. Of Health	APIS (Agricultural Plant and Inspection Services) ITAC - Import Permit required	Endorse Permit	Import Permit required from ITAC
0713.33.90	Other	Permit from the Director-General: Dept. Agriculture, Directorate: Plant Health Must be in the nett mass quantities prescribed Subject to an MMA-Permit from the	Act. 59/1968 ProcR1978/7 GN R1967/64 GNR18405/97 Trade Metrology Act No. 77/73 Foodstuffs, Cosmetics and	APIS - Directorate Agricultural Product Inspection Services PHO - Port Health Section of the Dept. Of Health	APIS PHO	Endorse Permit	1. Permit from Director-General: Dept. Agriculture 2. Permit from Directorate: Plant Health, 3. MMA-Permit from Dept. Agriculture, Marketing Administration

Heading	Description	Prohibition or Restriction	Authority	Action required: DETAIN FOR	Competent Authority	Customs Mandate	Documentary Requirement
		Dept. Agriculture, Marketing Administration	Disinfectants Act No. 54/72 Agricultural Pest Act No. 36/1983				
0713.39.90	Other	APIS (AGRICULTURAL PLANT AND INSPECTION SERVICE) - PHO - Port Health		APIS - Directorate Agricultural Product Inspection Services PHO - Port Health Section of the Dept. Of Health	APIS PHO	Endorse Permit	1. Permit from Director-General: Dept. Agriculture 2. Permit from Directorate: Plant Health, 3. MMA-Permit from Dept. Agriculture, Marketing Administration
0811.90	Other:	Detention of imports for Directorate: APIS, Department of Agriculture	Foodstuffs, Cosmetics & Disinfectants Act No. 54/72	APIS - Directorate Agricultural Product Inspection Services PHO - Port Health Section of the Dept. Of Health	APIS PHO	Endorse Permit	APIS - DIRECTORATE AGRICULTURE PHO - PORT HEALTH
0811.90.15	Granadilla pulp; litchi pulp	APIS - DIRECTORATE AGRICULTURE PHO - PORT		APIS - Directorate Agricultural Product Inspection Services	APIS PHO	Endorse Permit	APIS - DIRECTORATE AGRICULTURE PHO - PORT

Heading	Description	Prohibition or Restriction	Authority	Action required: DETAIN FOR	Competent Authority	Customs Mandate	Documentary Requirement
0811.90.90	Other	HEALTH		PHO - Port Health Section of the Dept. Of Health			HEALTH
0904.2	Fruits of the genus CAPSICUM or of the genus PIMENTA:	Detention of imports for Directorate: APIS, Department of Agriculture	Agricultural Pests Act No. 36/83	APIS - Directorate Agricultural Product Inspection Services PHO - Port Health Section of the Dept. Of Health	APIS PHO	Endorse Permit	Permit required from Directorate: APIS, Department of Agriculture
0904.21	Dried, neither crushed nor ground:	Detention of imports for Directorate: APIS, Department of Agriculture	Agricultural Pests Act No. 36/83	APIS - Directorate Agricultural Product Inspection Services PHO - Port Health Section of the Dept. Of Health	APIS PHO	Endorse Permit	Permit required from Directorate: APIS, Department of Agriculture
0904.21.10	Fruits of the genus CAPSICUM						
0904.21.30	Fruits of the genus PIMENTA						
0904.22	Crushed or ground:						
0904.22.10	Fruits of the genus CAPSICUM						
0904.22.30	Fruits of the genus PIMENTA						
0910.1	Ginger:	Detention of imports for Directorate: APIS, Department	Agricultural Pests Act No. 36/1983	APIS - Directorate Agricultural Product Inspection	APIS PHO	Endorse Permit	Permit required from Directorate: APIS, Department of

Heading	Description	Prohibition or Restriction	Authority	Action required: DETAIN FOR	Competent Authority	Customs Mandate	Documentary Requirement
0910.11	Neither crushed nor ground	of Agriculture		Services PHO - Port Health Section of the Dept. Of Health			Agriculture
0910.12	Crushed or ground						
1804.00	Cocoa butter, fat and oil:	Detention of imports for Directorate: APIS, Department of Agriculture	Agricultural Pests Act No. 36/1973	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	Permit from Directorate: APIS, Department of Agriculture
1604.13	Sardines, sardenella and brisling or sprats:	Check for CITES permit and endorse Permit needed if listed on CITES Appendices	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT
1604.19	Other:	Check for CITES permit and endorse. Permit needed if listed on CITES Appendices	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT
1604.19.10	Frozen	PHO - Port Health Section - STATE VETERINARY SERVICE (Department of Agriculture)		PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT
1604.19.20	Horse-mackerel (TRACHURUS TRACHURUS), in airtight metal containers, not frozen	Check for CITES permit and endorse. Permit needed if listed on CITES Appendices	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT
1604.19.90	Other						

Heading	Description	Prohibition or Restriction	Authority	Action required: DETAIN FOR	Competent Authority	Customs Mandate	Documentary Requirement
1604.20	Other prepared or preserved fish:	Check for CITES permit and endorse. Permit needed if listed on CITES Appendices	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT
1604.20.10	Fish paste	PHO - Port Health Section - STATE VETERINARY SERVICE (Department of Agriculture)		PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT
1604.20.20	Homogenised composite food preparations						
1604.20.30	Other anchovies						
1604.20.35	Other sardines (pilchards) (SARDINOPS SPP.) and sardinella (SARDINELLA SPP.), minced, in airtight containers for human consumption	Check for CITES permit and endorse Permit needed if listed on CITES Appendices	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT
1604.20.40	Other sardines (pilchards) (SARDINOPS SPP.), mackerel and horse mackerel (TRACHURUS TRACHURUS), in airtight metal containers						
1604.20.80	Other, frozen						
1604.20.90	Other	PHO - Port Health Section - STATE VETERINARY SERVICE (Department of Agriculture)		PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	MLRA Integrated and CITES permits issued by the Marine and Coastal Management Unit, DEAT

Heading	Description	Prohibition or Restriction	Authority	Action required: DETAIN FOR	Competent Authority	Customs Mandate	Documentary Requirement
2005.99	Other:		Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972 Ord. 36/1952 Dept. National Health & Population Development	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	Permit from Port Health Officer
2005.99.1	Pickles, mustard, chutney and the like preparations:	PHO - Port Health Section	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972 Ord. 36/1952 Dept. National Health & Population Development	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	Permit from Port Health Officer
2005.99.12	Other						
2005.99.2	Lentils, cucumbers and gherkins:						
2005.99.22	Other						
2005.99.3	Sauerkraut:						
2005.99.32	Other						
2005.99.9	Other:						
2005.99.99	Other						
2007.99	Other	PHO - Port Health Section		PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	Permit from Port Health Officer
2008.99	Other:	PHO - Port Health Section	Foodstuffs, Cosmetics and Disinfectant	PHO - Port Health Section of the Dept. Of	PHO	Endorse Permit	Permit from Port Health Officer

Heading	Description	Prohibition or Restriction	Authority	Action required: DETAIN FOR	Competent Authority	Customs Mandate	Documentary Requirement
2008.99.40	Tamarinds		s Act No. 54/1972	Health			
2008.99.50	Ginger preserved in syrup, in immediate packings of a content of 45 kg or more		Ord. 36/1952				
2008.99.60	Sweet corn (ZEA MAYS VAR. SACCHARATA)		Dept. National Health & Population Development				
2008.99.90	Other						
2009.8	Juice of any other single fruit or vegetable:	State Veterinary Service	Foodstuffs, Cosmetics and Disinfectants Act No. 54/1972 Ord. 36/1952 Dept. National Health & Population Development	PHO - Port Health Section of the Dept. Of Health	PHO	Endorse Permit	Permit from Port Health Officer

Source: Schedule of Prohibited and Restricted Imports Accessed September 21012

5.3 Industry and official standards

5.3.1 Fish and Fish Products

The National Regulator for Compulsory Specifications (NRCS) is a government body responsible for ensuring compliance with standards and regulations on both imports and locally produced products. NRCS administers food safety regulations (compulsory specifications) for fish and fish products as outlined below.

Document Number	Compulsory Specification
VC 8014	Compulsory specification for the manufacture, production, processing and treatment of canned fish, canned marine molluscs and canned crustaceans
VC 8017	Compulsory specification for frozen fish, frozen marine molluscs and frozen products derived therefrom
VC 8031	Compulsory specification for frozen shrimps (prawns), langoustines and crabs

The specifications cover the manufacture, production, processing, and treatment of the specified products and include best practice on staff training, factory layout, food handling and storage, disposal of waste, use of preservatives, cleaning and preparation methods and presentation. Whilst the regulations may appear daunting, a company currently exporting to markets in Europe or North America is probably already implementing the required procedures.

The NRCS will test samples on arrival of the product at Customs in South Africa. At this stage the product will be checked for conformity to the specification. The NRCS advises that any new entrant to the market submit samples to the NRCS through their local representative prior to shipping any large quantity. This allows the NRCS to check that the product and the label conforms to the specification and that any issues can be sorted out prior to shipment. This advice will save time and money in the long run.

The compulsory specifications are included in the following embedded documents.

Although no specific import license is required for imports of canned fish, the South African regulations are stringent and it is recommended that prior approval is obtained on both the product and the label prior to any consignment being sent to South Africa. This would require the submission of samples to the NRCS for testing. Tests would cover composition, pack size, colouration of product etc.

According to the NRCS, they prefer the importer to be present at the pre-importation testing so that they can engage in a dialogue directly with the importer as to what needs to be done to meet specification. This is not however compulsory and an Ecuadorian exporter could approach the NRCS directly. The NRCS does not recall ever testing any product from Ecuador so they have no preconceptions.

As specified in the legislation, all canned fish products require a compulsory inspection at the port of entry into South Africa to ensure they comply with local regulation including labelling requirements. This is the responsibility of the NRCS who need to ensure that the product complies with the compulsory specification VC8014.

To give an indication of the strictness of the NRCS inspection, in 2009, only 65% of inspections on imported canned fish were found to comply with the regulations and 32% were found to be sub-standard.

If the product does not meet specifications, exporters should be open to working to the NRCS to rectify problems. A situation such as this occurred on canned tuna from Mauritius where the NRCS (the SABS at the time) had a problem with the colouration on the fish as it appeared slightly bruised. Mauritian exporters needed to address the way in which the fish was handled on the boats to address this issue.

Other common quality problems, specifically with pilchards/sardines include:

- General appearance
- Torn bellies
- Damaged units
- Sediment in sauce
- Low drained masses
- Broken up units
- Poor thin & watery sauce

The presentation from the NRCS embedded below provides excellent photographs of control samples and products that do not meet the specification.

5.3.2 Dried Beans

The Department of Agriculture in terms of the Agricultural Products Standards Act has specified Regulations relating to the grading, packing and marking of dry beans intended for sale in South Africa. A copy of this regulation can be found in the embedded document below.



Import Regulations
Dried Beans.pdf

5.4 Phytosanitary and sanitary requirements

Agricultural Pest Act

The National Plant Protection Organisation of South Africa (NPPOSA) is responsible for the issuing of import permits for fruit and vegetables. Importers of fruit and vegetables must apply for a permit for the importation of controlled goods (including fresh fruit and vegetables) in terms of the provisions of the Agricultural Pests Act, 1983. The application must be submitted at least 30 days prior to the date of arrival of the goods concerned in South Africa. A copy of the Act can be viewed at: <http://www.nda.agric.za/docs/NPPOZA/Agricultural%20Pests%20Act.pdf>.

Applications must be submitted to:

Director; Directorate: Plant Health & Quality

Private Bag X258, Pretoria, 0001

Tel: +27 12 319 6102/6396

Fax: +27 12 319 6370

E-mail: JeremiahMA@nda.agric.za

The importer will need to declare that the goods concerned do not contain any genetically manipulated organisms, and must provide the following information for all controlled goods:

- Description of controlled goods;

- Name of variety of plants (where applicable);
- Quantity (number or mass);
- Full name and address of foreign supplier;
- Port of entry;
- Purpose of which imported;
- Country of origin;
- Name and contact details of company / applicant

Pest Risk Assessment (PRA)

Fruit and vegetable exports from Peru require a phytosanitary certificate from the source country in order for these controlled goods to pass evaluation and inspection from the NPPO in South Africa. Prior to the Department of Agriculture, Forestry and Fisheries issuing an import permit for fresh produce to be imported into South Africa, a Pest Risk Assessment (PRA) must be conducted at source and specific conditions set according to the phytosanitary risks involved. So for example, at present Capsicum SPP can only be imported from Israel, Namibia, the Netherlands and Zimbabwe and Strawberries can only be imported from Kenya, Egypt, Zimbabwe, Spain, Portugal, Sri Lanka and Israel.

According to the Department of Agriculture, a PRA has not been carried out on Peruvian growers, and therefore, at present, no import permits will be issued. For more information, please contact:

National Plant Protection Organisation of South Africa (NPPOSA)

Department of Agriculture

Tel: +27 12 319 6396

Contact: Ms Anita Snyman

E-mail: anitas@daff.gov.za

5.5 Labelling and packaging regulations

The Foodstuffs, Cosmetics and Disinfectants act of 1972 contains regulations governing the labelling and advertising of foodstuffs that have been in place for many years. The existing regulations are very specific in relation to the name of the foodstuff, size of lettering, prohibited statements, ingredients, nutritive value claims and nutrition information format. Any pre-packaged foodstuff imported into or consigned to any place within South Africa must bear a label stating any particulars specifically required by the Act or the regulations.

The existing regulations have been found lacking and a new regulation (as an amendment to the Act) relating to the labelling and advertising of foodstuffs has recently been published in the Government Gazette of 1 March 2010 (Government Notice R. 146). The Regulations provide clear guidance on "do's" and "don'ts" regarding the information provided on the labels and in advertisements of foodstuffs. Manufacturers of foodstuffs, both nationally and internationally in respect of imported foodstuffs, will be obliged to adapt their labelling accordingly. However, the implementation thereof will come into effect 12 months from the date of publication (i.e. from 1 March 2011) to provide for most of the labelling requirements included in the new regulations.

Key points in the new labelling regulations include:

- Labels should be in English and, where possible, at least one other official language of South Africa.
- The new regulation includes country of origin labelling and all imported food products are required to state “Product of.....” on the label.
- The label needs to contain the name of the particular foodstuff, the name and address of the manufacturer, instructions for use where appropriate, a list of ingredients, special storage conditions and net contents.
- Date marking needs to appear on the container and be preceded by the words “Best Before” or “Sell by”

The full regulation can be downloaded at the following link:

<http://www.doh.gov.za/docs/regulations/2010/reg0146.pdf>

The Compulsory Specifications on canned fish and fish products are very specific regarding the content of labels for fish products. These should be read in conjunction with the new foodstuff

labelling regulations. The labelling regulations as they appear in the compulsory standards read as follows:

The label must contain the following information:

1. The name and full physical address of the manufacturer, producer, proprietor or controlling company, or, in the case of containers packed for any other person or organization, the name and full physical address of that person or organization;
2. A true description of the product, including the name of the product and the presentation of the contents. In addition, in the case of a quick-frozen product, the words "Quick frozen". The name and/or trade name or designation that is used in the labelling of the product shall not be misleading, and the variety of fish, except in the case of fish sticks, fish portions, fish cakes, fish balls, fish patties and fish sausages, shall be stated. The method of preparation and the presentation of the contents shall be in accordance with the description on the label or package.
3. Where applicable, a list of the ingredients, in descending order of content;
4. A statement that the product is cooked or uncooked, as applicable, and instructions for storage,
5. given in the following manner:
 - Uncooked (or raw) - Keep frozen;
 - Partly cooked - Keep frozen. Do not refreeze once thawed;
 - Cooked - Keep frozen. Do not refreeze once thawed;
6. In the case of products for sale in the Republic of South Africa, the net mass of the contents, where applicable (in accordance with the Regulations promulgated under the Trade Metrology Act, 1973 (Act 77 of 1973)); where the product has been glazed, the net mass declaration of the product shall be exclusive of the glaze;
7. The country of origin;
8. If the product has been glazed with sea water, a statement to this effect prominently displayed on the main panel of the label, in immediate conjunction with the name of the product;
9. Where relevant, directions for use;
10. Any labelling requirement specifically called for by regulation; and

11. The date of manufacture and the identity of the factory in which the product was packed.

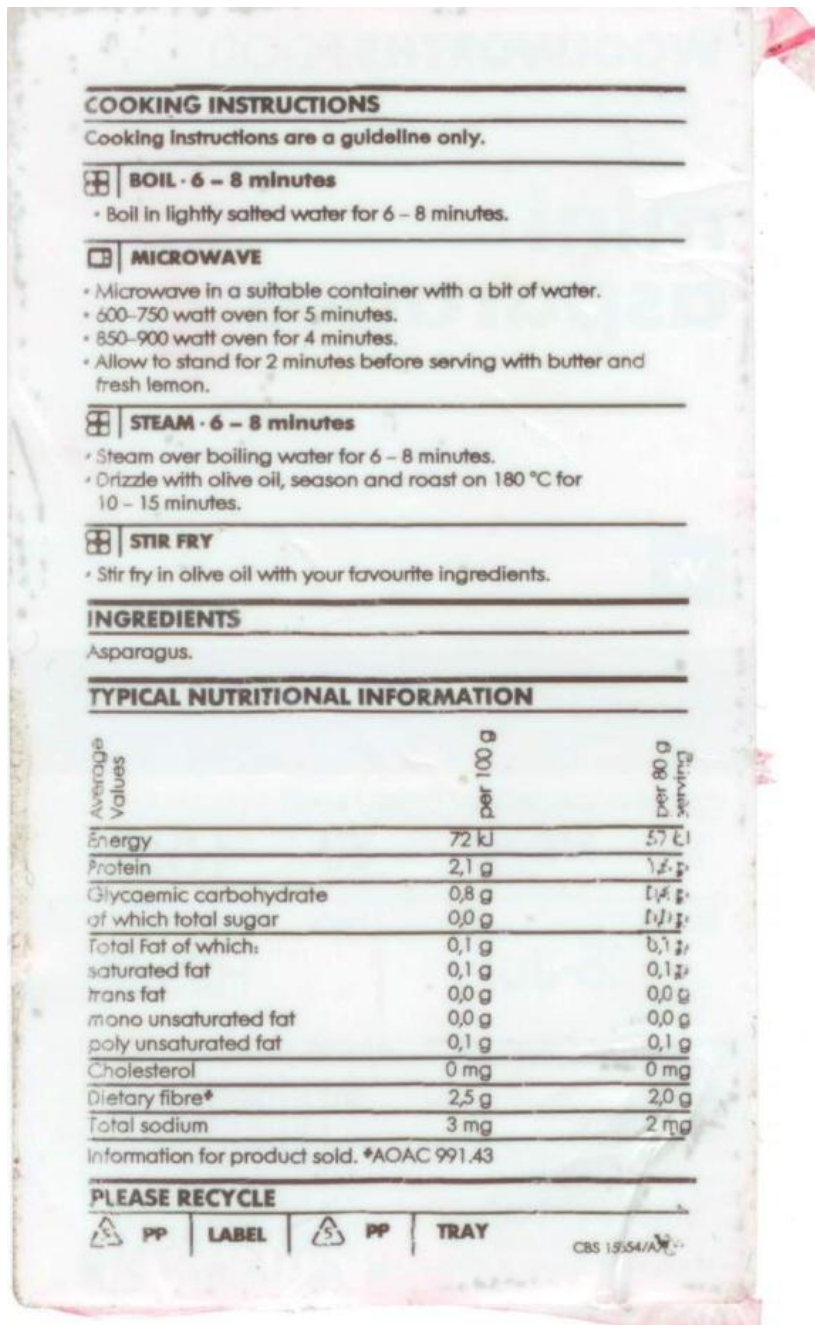
The use of a code is permissible,

The photos below depict typical packaging and labelling.





Front of Asparagus Pack



Back of Asparagus Pack Label



Labelling on a pack of frozen tiger prawns

Below is a typical label from a can of Tuna available at SPAR supermarkets.



The photo below illustrates common packaging used for canned sardine and tuna.



The compulsory specifications are very particular about the proper names given to specific fish species. For sardine, the regulations are as follows:

Canned sardines or sardine type products are prepared from the following species:

- *Sardina pilchardus*
- *Sardinops melanostictus*, *S. neopilchardus*, *S. ocellatus*, *S. sagax*, *S. caeruleus*,



- *Sardinella aurita*, *S. brasiliensis*, *S. maderensis*, *S. longiceps*, *S. gibbosa*
- *Sprattus sprattus*

Depending on the species used, the name of the product shall be:

- "Sardines" exclusively reserved for *Sardina pilchardus* (Walbaum); or
- "X sardines" where "X" is the name or description of a country, the species, or the common name of the species in accordance with this specification and in a manner not confusing or misleading to the consumer in close proximity and in a letter size at least half the size of the word sardines and in equal prominence, with the exception that the species *Sprattus sprattus* may be described as brisling sardines.
- The description "Pilchards/Sardyne" is exclusively reserved for the species *Sardinops ocellatus*, *S. melanostitus*, *S. neopilchardus*, *S. sagax*, *S. caeruleus* and *Sardina pilchardus*.
- *Sardinella* spp shall be described as "Sardinella". The descriptive terms "Pilchards" shall be not used for packs consisting of *Sardinella* spp.

5.6 Required certifications

In the case of canned fish, the purchasers require the product to comply with the compulsory specification and they require the product to be declared compliant by the NRCS. Without the approval of the NRCS, it is not possible for the product to enter South Africa.

Likewise with fresh fruits and vegetables, the purchasers require the correct Pest Risk Assessments to be in place so that import permits can be issued.

South African consumers are becoming more educated about environmental issues and purchasers will sometimes require "dolphin-friendly" logos or certification that fish have been pole-caught. Essentially purchasers are looking for suppliers that fish in a sustainable and "sea-friendly" manner.

5.7 Transport modalities (from Peru to South Africa)

South Africa's ports, railways, road and air transportation infrastructure are well developed and support the efficient distribution of imported and domestically produced goods to both the major urban centres and the entire southern African region. The road, rail, and air transport services are good throughout most parts of the country. The quality of infrastructure in the rural areas is generally in need of development and improvement.

Product from Peru delivered by sea will be discharged at either Cape Town or Durban depending on the location of the importer, the location of their cold storage facilities and the final destination of the product. From there the goods will be transported internally by road or rail. Rail services are provided by the state-owned Transnet Freight Rail and there are several private-sector companies providing trucking services throughout the country.

The national airline, South African Airways, is the primary carrier within the country although recently a number of private airlines have begun to provide services in competition with the national airline.

There are sailings from the port of Callao in Peru via Guayaquil in Ecuador, Buenaventure in Colombia direct to Cape Town, Port Elizabeth and Durban.

There are no direct flights from Peru to South Africa. The closest transit points would be Sao Paulo in Brasil, Buenos Aires in Argentina or Amsterdam in the Netherlands. Air transport would only be an option for smaller shipments of perishable cargo given the cost. Currently fresh asparagus is being airfreighted out of Lima 3 times a week and arrives in stores in South Africa 4 days after leaving Peru. The importer does however sometimes have to use a longer and more expensive route as the timing on flights via Sao Paulo does not always work out.

5.8 Transit times

Given the cost of airfreight, sea is the best option for getting goods to South Africa. The main problem with the sea transport is however the transit time. Goods can take anywhere between 6

and 12 weeks to get to Cape Town from Peru given that the ships dock at a number of ports after Callao. The transit times out of Asia or Europe are 4 weeks maximum.

5.9 Product Support Channels

5.9.1 Trade fairs and related events

Africa's Big Seven

Africa's Big Seven Expo presents a composite of seven separate but co-located events that define the various stages and specific technologies required to move produce from the field through the processing, packaging and marketing phases eventually culminating in retail sales. This is an annual exhibition and until the appearance of IFEA, was the only specialist food exhibition in the country. It takes place in Johannesburg in July. This event has always been very popular with foreign missions in South Africa looking to promote their country's products.

Lineke Fleischer, Exhibition Manager

E-mail: admin@exhibitionsafrica.com

Tel: +27-11-783-7250/1/6/9

Fax: +27-11-783-7269

Good Food & Wine Show

Cape 23 to 26 May 2013

Durban 8 to 11 August 2013

Johannesburg September 2013

The Good Food and Wine Show is an annual exhibition held in three locations throughout the year. It is an interactive show and gives exhibitors an opportunity to communicate directly with their consumer target market.

Jason Lunn

E-mail: jason@gourmetsa.com

Tel: +27 21 702 2280

Website: www.goodfoodandwineshow.co.za



Hostex

Johannesburg, 17 to 20 March 2013

South Africa's International Hospitality & Catering Exhibition

Hostex provides the best opportunity for face-to-face product promotion in the hospitality industry.

Lindy Taylor

Specialised Exhibitions

Tel: +27 11 835 1565

Fax: +27 11 496 1161

Email: lindy@specialised.com

Website: www.hostex.co.za

IFEA 2013

Johannesburg 18-20 September 2013

IFEA originates from the UK based IFE. This is a brand new exhibition which will take place for the first time in South Africa in 2013. IFEA brings together the world's leading food & drink brands, local producers and leading African brands, to meet retail and food service buyers, importers, wholesalers and distributors from across the African continent.

Bradley Hook

Specialised Exhibitions (Pty) Ltd

Tel: +27 (011) 835 1565

E-mail: bradh@specialised.com

Website: www.ifea.co.za

6.0 Contacts of Interest

6.1 Institutions

Department of Trade and Industry

Tel: +27 (12) 394 9500

Website: www.dti.gov.za

International Trade Administration Commission of South Africa (ITAC)

Contact: Phillip Snyman

E-mail: PSnyman@itac.org.za

Tel: +27 12 394 3608

Website: www.itac.org.za

South African Bureau of Standards (SABS)

Food and Health Directorate

Contact: General Manager

Tel: +27 12 428 6402

Email: rina@sabs.co.za

Website: www.sabs.co.za

National Regulator for Compulsory Standards

Tel: +27 12 428 5000

Fax: +27 12 428 5199

E-mail nrcs@nrcs.org.za

Website: www.nrcs.org.za

Department of Agriculture

Agricultural Product Inspection Services

Mr M Holtzhauzen, Deputy Director

Tel: +27 12 319 6100

Fax: +27 12 319 6350

E-mail: MikeH@daff.gov.za

Department of Agriculture

Directorate Animal Health

Sub-Directorate Import Export Policy Unit

Head of Permit Office: Mrs Ina Labuschagne

E-mail: inaL@daff.gov.za

Tel: +27 12 319 7514

Fax numbers for permit applications: +27 12 329 8292

6.2 Transport and logistics companies

Sea:

Mediterranean Shipping Company

Cape Town

Tel: +27 21 405 2000

Fax: +27 21 419 1546

E-mail: mike@msc.co.za

Freight Forwarders:

A.Hardrodt South Africa

Johannesburg

Tel: +27 1111 929 4900

Fax: +27-11-397 4221

Email: ahjnb@hartrodt.co.za

Grindrod South Africa (Pty) Ltd

Tel: + 27 31 304 1451

Fax: + 27 31 305 2848

Email: grindrod@grindrod.co.za

Hellmann Worldwide Logistics

Tel: +27 11 928 7000

Email: vnunco@za.hellmann.net

Kuehne + Nagel

Tel: +27 11 574 7000

Fax: +27-11-5747200

Email: hylton.gray@kuehne-nagel.com

6.3 Associations and Chambers

Fresh Produce Importers Association

General Manager: Marianna Theyse

Tel: +27 12 331 5341

Fax: +27 86 663 5258

E-mail: info@fpia.co.za

Web site: www.fpia.co.za

Avocado Growers' Association, SA

www.avocado.co.za

SA Mango Growers' Association

www.mango.co.za

SA Fruit and Vegetable Canners' Association

www.safvca.co.za

Association for Vegetables under Protection (AVUP)

www.asnapp.org.za

Canned Fruit Producers' Association

www.canningfruit.co.za

South African Deep Sea Trawling Association

Tel: +27 21-425-2727

Web site: www.sadstia.co.za

Abalone Farmers Association of South Africa

Tel: +27 21-402-9200

Aquaculture Association of Southern Africa

Tel: +27 12 8075190

Website: www.aasa-aqua.co.za

Mariculture Association of Southern Africa

Tel: +27 21-650-2681

SA Inshore Fishing Industry Association

Tel: +27 21-425-2727

SA Linefish Management Industrial Association

Tel: +27 21-790-4083

Johannesburg Chamber of Commerce and Industry (Nafcoc – JCCI)

Tel: +27 11 726 5300



Web site: www.jcci.co.za

Cape Town Chamber of Commerce and Industry

Tel: +27 21 402 4300

Web site: www.capetownchamber.com

Durban Chamber of Commerce and Industry

Tel: +27 31 335 1000

Web site: www.durbanchamber.co.za

Gauteng Economic Development Authority

Tel: +27 11 833 8750

Web site: www.geda.co.za

Wesgro

Tel: +27 21 487 8600

Web site: www.wesgro.co.za

Trade & Investment KwaZulu Natal

Tel: +27 31 368 9600

Web site: www.tikzn.co.za

6.4 Specialized magazines

The Fishing Industry News

Fishing Industry News Southern Africa is a bi-monthly publication (6 issues per year) that reports regularly on the South African fishing industry

Subscriptions from:

Bob Whitehouse

Tel: +27 21-4658612

Cell: 083 517 9923

Web site: www.gwarmanpublications.co.za/

Food & Beverage Reporter

Food & Beverage Reporter is the widest-circulating printed magazine for the food, beverage and packaging industries in southern Africa. It is an extremely useful source of information on trends and issues facing the South African food and consumer market in general.

Subscriptions from:

Teigue Payne

Tel: +27-11-880-3682

E-mail: publish@developotechnology.co

Web site: www.developotechnology.co.za

The Butler

The Butler is a bi-monthly publication focusing on the hospitality industry. It provides useful insight into the South African hospitality industry.

Tel: +27 11 325-2458 •

Web site: www.butlermagazine.co.za

6.5 Other addresses or useful links

The Retailer

Very useful source of news on the South African retail sector

www.theretailer.co.za

Fastmoving

An industry portal focusing on the South African FMCG sector

www.fastmoving.co.za/

Department of Forestry and Fishing

The government department responsible for South Africa's fishing resources

www.daff.gov.za

National Regulator for Compulsory Standards

Government body responsible for administering the compulsory standards on canned fish and fish products

www.nrccs.org.za

Animal Feed Manufacturers Association

A useful source of information on usage of fishmeal in South Africa

www.afma.co.za

Develop Technology

This is the website of the Food & Beverage Reporter and contains a useful database of articles on the South African food industry.

www.developtechnology.co.za