



Economics and Trade

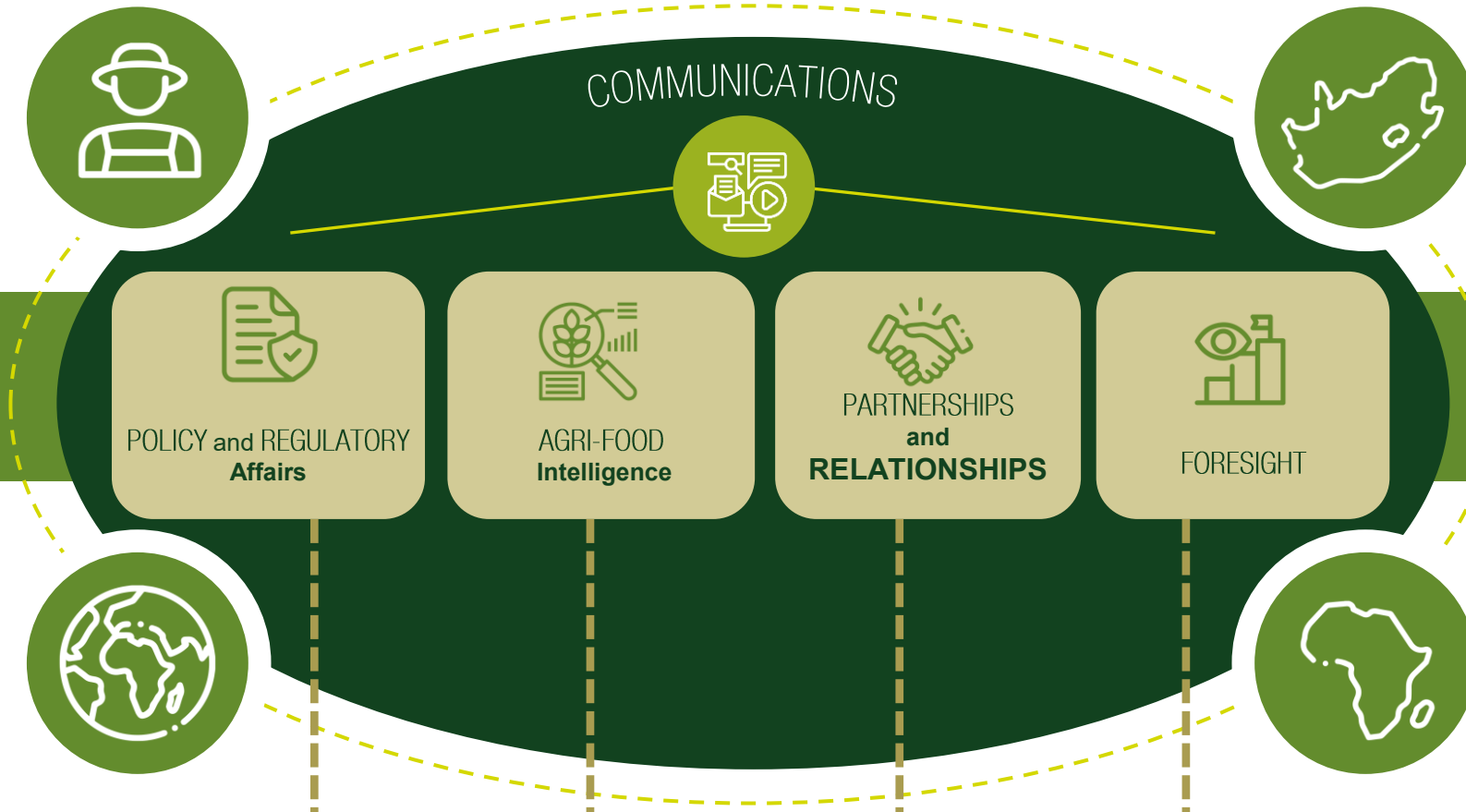
Centre of Excellence

DRAFT
Nov 2025

Outline

1. AgriSA Strategy
2. COE framework for effectiveness
3. Economics and Trade COE vision, mission and mandate
4. Member needs analysis
5. Governance and Management structure
6. Process and workflow
7. COE Focus areas
 - a. Roads
 - b. Logistics
 - c. Energy
 - d. Economy
 - e. Taxation
 - f. Trade
 - g. Telecommunication

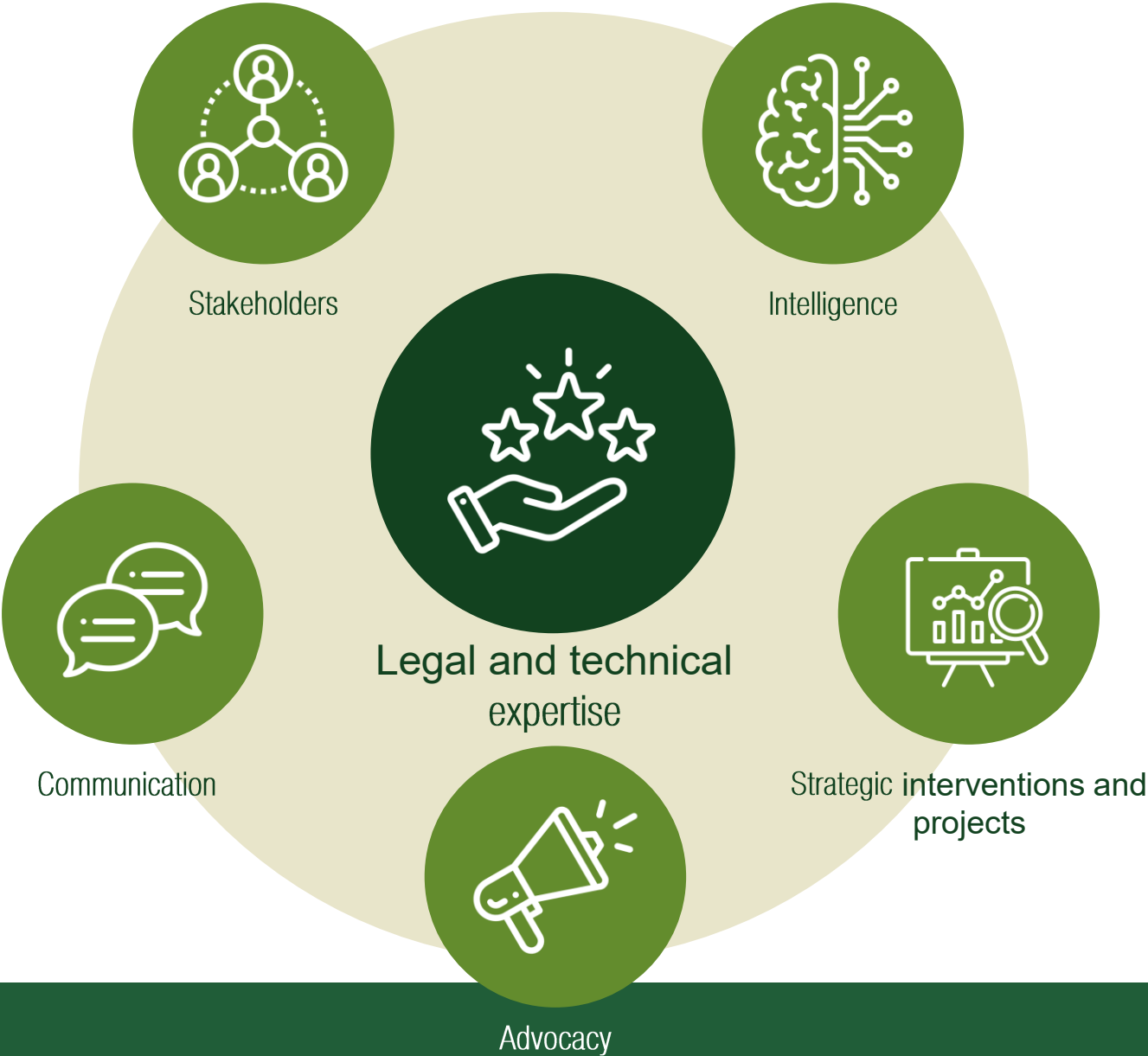
OPERATION FOCUS



GOALS



FRAMEWORK for
managing COE
effectiveness and
impact



Economics and Trade COE

VISION

To cultivate a dynamic agricultural sector that supports **farmer sustainability**, elevates industry standards, and enhances global competitiveness.

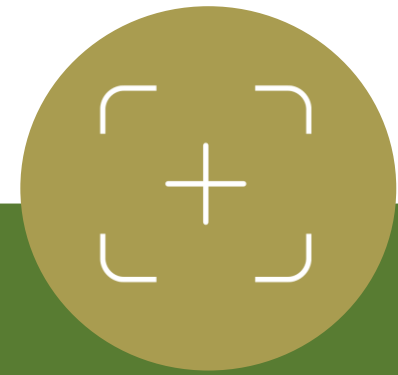
MISSION

To represent and empower agricultural affiliates through resources and intelligence by collaborating with government and industry to ensure a robust agricultural sector.

MANDATE

The centre's mandate is focused on:

- **ECONOMIC POLICIES** that impact the financial well-being of **our farmer members to prosper**.
- Enhancing value for members, by executing the mandate through dynamic and **PROACTIVE ANALYSIS AND INSIGHTS**.
- Leveraging **GREATER STRATEGIC PARTNERSHIP** to achieve objectives as well as greater policy influence.



KEY FOCUS AREAS

1. Logistics
2. Energy
3. Policy and advocacy
4. Taxation
5. Telecommunication
6. Roads
7. Trade

Economics and Trade COE – Member Needs Analysis

PROVINCIAL CHAMBER

- Comprised of agricultural associations representing farmers and farmer associations
- Quality information / good advice
- Development and co-ordination of solutions across provinces on national level
- Pooling of resources to reduce cost of advocacy, facilitation or protection of rights

COMMODITY & CORPORATE CHAMBERS

- Represent specialist agricultural commodities (i.e. products produced by farmers)
- Contribute towards general affairs
- Facilitation services important to commodity and commodity organisations
 - Pooling of resources
 - Network building and value chain synergies
 - Trade and market access
 - Biosecurity
 - Research and development
 - Agricultural development
 - Media engagement

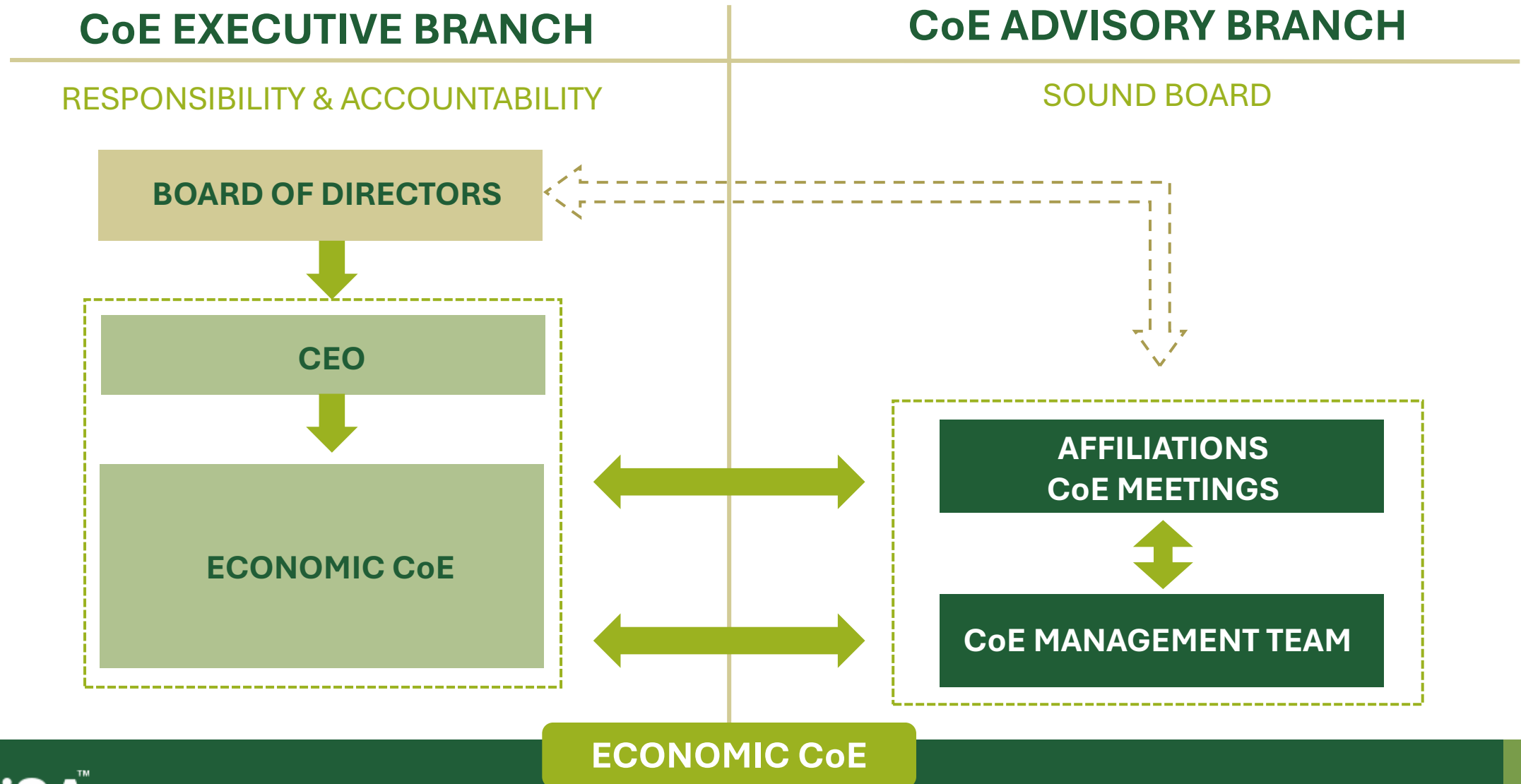
PRIMARY PRODUCERS

Farmers

- Require a **prosperous and sustainable environment** to flourish
- Require **friendly policy environment** with good economic prospects



Economics and Trade CoE – Governance and Management structure



Economics and Trade COE – Process and workflow

RAISING OF risk or opportunity

- Chief Executive Officer
- Board of Directors
- Chambers (Provincial/Commodity/Corporate)
- Affiliations
- Personnel
- Management team

SOLUTIONS AND IMPLEMENTATION

- Is it a national issue?
- It is of common interest?
- Expertise required?
- Develop action plan

MONITORING

- Prioritise subjects
- Monthly reporting on progress of action plans
- Re-evaluate action plans if difficulties arise
- Refine action plan if necessary
- Reporting per e-mail and current protocol
- Reporting at Board/Chamber/CoE meetings

WHERE?

- Board of director's meetings (6 x year)
- Chamber meetings (3 x year)
- CoE meetings (2 x year)
- CoE management meetings (1 x month)

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- Internal staff meetings

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- Chamber meetings (3 x year)
- CoE meetings (2 x year)
- CoE management meetings (1 x month)



ROADS

Economics and Trade COE - Roads - Subcommittee

Chairman:

Johan Berg

Functionary:

Jolanda Andrag & Jason Kümm

Advisory Members:

Ms Sandy La Marque (*Kwanalu*)

Dr Jack Armour (*Free State Agriculture*)

Mr Corné Louw (*Grain SA*)

Noord-Kaap

Oos-Kaap

Economics and Trade COE - Roads - Focus areas

1



Road
Infrastructure
Intelligence

2



Policy and
legal affairs

3



Advocacy

4



Communication
and
Transparency

1

Road Infrastructure Intelligence

OBJECTIVES



Digital database
providing an overview
of state of road
infrastructure



Member “incident”
reporting system



Prioritisation tool relative
to economic indices that
can inform maintenance
and planning

2

Policy and legal affairs

LIABILITY CLAUSE

Investigating a solution to the problem that **associations** and individual **farmers might attract liability** when they repair roads themselves, with the involvement of a legal practitioner.

SANRAL PRIORITISATION

Sanral currently has approximately 20 000km on there books and has capacity for 35 000 km

CAPACITY BUILDING

Engage with the Department of Transport to streamline the personnel restructuring at Provincial Roads Departments.

EXPANDED PUBLIC WORKS PROGRAMME (EPWP)

The Expanded Public Works Programme (EPWP) focuses on skills development and providing work opportunities

TENDER PROCESSES

Ensuring adequate process, scoping and effective delivery.

COSTS INCURRED

The cost of incurred for maintaining and repairing roads.

Stakeholder	AgriSA's Objectives
Department of Transport	<ul style="list-style-type: none"> • Advocate for prioritizing rural roads to improve accessibility, safety, and economic development in rural areas. • Promote efficient allocation of maintenance resources to ensure sustainability and connectivity. • Support with intelligence on state of roads.
Sanral	<ul style="list-style-type: none"> • Ensure rural roads are included in national road planning. • Support initiatives that extend Sanral's network, fostering regional connectivity and supporting agriculture logistics with intelligence on the state of roads. • Lobby for the transfer of additional roads to Sanral.
SALGA (South African Local Government Association)	<ul style="list-style-type: none"> • Collaborate on local government initiatives to upgrade and maintain rural roads. • Support capacity building for local municipalities to manage rural infrastructure effectively.
Infrastructure SA	<ul style="list-style-type: none"> • Provide strategic advice on infrastructure investments in rural transport networks. • Support with intelligence on state of roads and influence prioritisation. • Advocate for prioritised road infrastructure projects that facilitate rural economic growth and resilience.
Department of Public Works	<ul style="list-style-type: none"> • Promote maintenance and upgrading of rural infrastructure, including transport corridors. • Support with intelligence on state of roads. • Support projects that enhance rural access to public services and markets.

4

Communication and Transparency

COORDINATION AND ALIGNMENT

Investigating a solution to the problem that associations and individual farmers might attract liability when they repair roads themselves, with the involvement of a legal practitioner.

COMMUNICATION ON PRIORITISATION OF KEY PROJECTS AND MAINTENANCE

Frequent and transparent communication on status and progress with key projects and maintenance

BUDGET AND RESOURCES

Transparency on resource allocation and alignment with key project and maintenance

LOGISTICS

Economics and Trade COE - **Logistics** - Subcommittee

Chairman:

Johann Kotze

Functionary:

Jolanda Andrag & Jason Kümm

Advisory Members:

Provincial / Commodity / Corporate Chamber Chairmen

Logistics expert: To be determined by subcommittee

Additional members: To be determined by subcommittee, commodities to propose

Economics and Trade COE - Logistics - Focus Areas

1



Transport
Infrastructure
Intelligence

2



Policy and
legal affairs

3



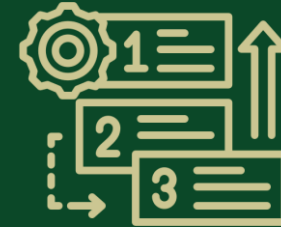
Advocacy

1

Logistics Infrastructure Intelligence - Objectives



Digital database
providing an overview
of state of transport
infrastructure



Prioritisation tool relative
to economic indices that
can inform maintenance
and planning

2

Policy and legal affairs - Objectives

- 1. Privatisation and Public-Private Partnerships (PPPs)** Introducing private sector participation to increase investment, innovation, and efficiency in port operations and freight logistics.
- 2. Infrastructure Modernisation:** Upgrading port facilities, equipment, and digital systems to improve throughput capacity and reduce turnaround times.
- 3. Regulatory and Administrative Reforms:** Streamlining customs procedures, reducing bureaucratic delays, and establishing clear, transparent tariffs and regulations.
- 4. Enhanced Governance and Accountability:** Implementing stronger oversight mechanisms, reducing corruption, and promoting operational transparency within Transnet.
- 5. Investment in Rail logistics and Supply Chain Integration:** Developing a smarter, more integrated logistics network that links ports with inland transportation modes.

3

Advocacy - Objectives

Stakeholder	AgriSA's Objectives
Transnet	Aligning agricultural growth forecast with Transnet's logistics and transportation capabilities to improve efficiency, reliability, access to markets, and the overall development of the agricultural sector.
National Logistics Crisis Committee (NLCC)	Collaborate to develop and implement solutions for logistics bottlenecks affecting agricultural produce.
The Presidency	Advocate for policies prioritising agricultural logistics and secure high-level support for privatization, investment and greater efficiency.
Department of Transport	Improve transportation infrastructure and regulations for agricultural freight.
Department of Public Works	Lobby for prioritisation of agricultural growth corridors and optimize operations supporting agriculture.
The Treasury	Secure funding and fiscal support for logistics projects benefiting agricultural trade corridors
Industry Organisations	Leverage insights and coordinate efforts to address sector-specific logistics challenges.
Agbiz	Align logistics initiatives with broader agricultural strategies.
Department of Agriculture	Lobby for improved market access, export logistics, and transportation solutions for farmers.

ENERGY

Economics and Trade COE - Energy - Focus Areas

1



Energy
Infrastructure
Intelligence

2



Policy and
legal affairs

3



Advocacy

1 Energy Infrastructure Intelligence - Objectives



Digital database
providing an overview
of state of energy
infrastructure

2 Policy and legal affairs - Objectives

MONITOR THE ROLE OUT OF RURAFLEX TARIFFS

Address case studies where significant price increases were brought about by the recent tariff increase.

MAINTENANCE IN RURAL AREAS

Lobby for the prioritisation of lines and infrastructure in rural areas.

AVAILABILITY OF TECHNICIANS IN RURAL AREAS

Clarity on the usage of private technicians.

ISOLATE DISTRIBUTION LINES FOR AGRICULTURE

Implement dedicated distribution lines for agricultural areas to ensure uninterrupted power supply tailored to the specific needs of farming operations.

CAPACITY OF TRANSMISSION LINES

Enhance the capacity of transmission lines to support increased electricity demands in agricultural sectors, ensuring efficient and reliable power delivery.

BASE LOAD REQUIREMENTS

Address base load requirements by ensuring consistent electricity supply to support continuous agricultural processes and operations without interruptions.

LOBBY FOR INCENTIVES

Advocate for financial and policy incentives to encourage the adoption of renewable energy and energy-efficient practices within the agricultural sector.

FEED-IN TARIFFS

Promote the implementation of feed-in tariffs to enable farmers and renewable energy producers to earn stable, long-term returns by supplying excess energy to the grid.

3

Advocacy - Objectives

Stakeholder	AgriSA's Objectives
ESKOM	Collaborate to ensure a stable and reliable electricity supply for agricultural operations, minimizing disruptions, load reductions and proactively maintaining infrastructure.
NERSA	Advocate for fair and affordable electricity tariffs and regulations that support agricultural needs.
SALGA	Partner with local governments to improve electricity infrastructure in rural agricultural areas.
Dept of Minerals & Energy	Work together to promote policies that enhance energy accessibility and sustainability for farmers.
Renewable Energy Companies	Foster partnerships to increase the adoption of renewable energy solutions in agriculture, reducing carbon footprints and addressing policy constraints inhibiting independence.

ECONOMY

Economics and Trade COE - Economic - Focus Areas

1



Economic
intelligence

2



Policy and
legal affairs

3



Advocacy

1

Economic Intelligence - Objectives



A **LIVE DASHBOARD** on the performance of agriculture Agri, supply and market **PERFORMANCE**



Clear breakdown of **RISKS** per segment of the value chain and province

Clear **IDENTIFICATION** of stakeholders per risk and responsible entities



EFFICIENT interventions

2 Policy and legal affairs - Objectives

1. Agricultural & Agro-processing Master Plan

2. Merchant Shipping Bill

3. Tobacco Products and Electronic Delivery Systems Control Bill

4. “Reticulation” - SALGA vs Eskom

3

Advocacy - Objectives

Stakeholder	AgriSA's Objectives
Landbank	Facilitate access to affordable financing and land development support to promote sustainable agricultural growth and investment.
SASRIA	Develop appropriate insurance solutions to mitigate risks associated with climate change, natural disasters, and market volatility affecting agriculture.
DTIC (Department of Trade, Industry & Competition)	Promote policies that enhance competitiveness, value addition, and export capacity of the agricultural sector through targeted industrial support.
Department of Agriculture	Drive policies that strengthen agriculture productivity, rural development, and access to markets for smallholder and commercial farmers.
Department of Rural Development	Support integrated rural development initiatives to improve livelihoods, infrastructure, and access to resources in rural agricultural communities.
Treasury	Ensure fiscal- and subsidy policies are aligned to promote sustainable investment, infrastructure development, and economic resilience in agriculture.
Competition Commission	Foster a competitive market environment by preventing monopolistic practices and promoting fair trading within agricultural value chains.

TAXATION

Economics and Trade COE - Taxation - Subcommittee

Chairman:

Len Voster

Functionary:

Jolanda Andrag

Advisory Members:

Sandy La Marque

Deidre Carter

Economics and Trade COE - Taxation - Focus Areas

1



Tax intelligence

2



Policy and
legal affairs

3



Advocacy

1

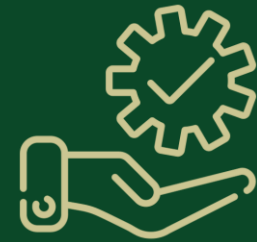
Tax Intelligence - Objectives



STATE OF TAX
in agriculture



IMPACT
of tax



EFFICIENT
interventions

2 Policy and legal affairs - Objectives

MUNICIPAL PROPERTY RATES ON AGRICULTURAL LAND

Advocate for fair property rate policies that do not unduly burden farmers, ensuring land remains a viable and productive asset.

DIESEL REBATE

Support the continuation or expansion of diesel rebates to reduce fuel costs for farmers, enhancing the competitiveness of agricultural operations.

CARBON TAX

Engage to ensure that carbon taxes are implemented in a way that balances environmental goals with the economic sustainability of agriculture.

GREEN TAXONOMY

Promote the adoption of green taxonomy standards that recognize sustainable agricultural practices and facilitate access to green finance.

FUEL LEVY

Push for the equitable allocation of fuel levies, ensuring funds support rural infrastructure and sustainable agricultural energy solutions.

3

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TRADE

FOCUS



Trade Policy and Agreements



Trade Intelligence



Stakeholders



Foresight

GOALS



INFLUENTIAL and collaborative trade policy organisation



LIVE VIEW on export and imports

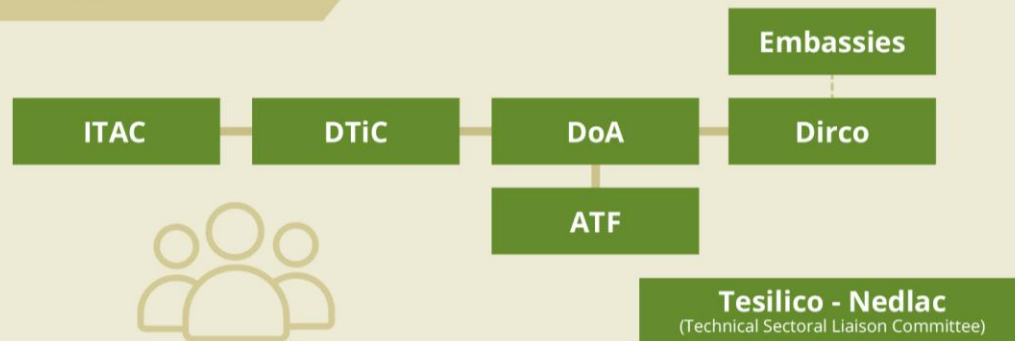


SHARED INTELLIGENCE and coordinate interactions



PRO-ACTIVELY INFLUENCING stakeholders with **DATA-DRIVEN** insight

STAKEHOLDERS



CURRENT GLOBAL TRADE INDUSTRY PRIORITIES



Enhance Trade Agreements and Diplomacy

South Africa should prioritise establishing strategic Free Trade Agreements (FTAs), Preferential Trade Agreements (PTAs) and Economic Integration Agreements (EIAs), particularly with key markets in Asia and the Pacific Rim. These agreements can lower tariffs and facilitate economic integration, increasing competitiveness.



Address Tariff and Non-Tariff Barriers

South Africa needs to work on reducing both tariff and non-tariff barriers that restrict market access, particularly the BRICS market.



Diversify Export Markets

Further diversification of export destinations can mitigate risks associated with geopolitical uncertainties. South Africa should explore expanding its presence in growing markets, including increased engagement with African nations and the BRICS countries.



Adapt to EU's Green Deal Requirements

To maintain and expand market share in Europe, South Africa should proactively demonstrate its long-established commitment to nature positive farming. Where feasible and practical, agricultural producers focusing on the EU market should align with their practices with the EU's sustainability and environmental standards. However, this practice should not compromise local food security and profitability.



Leverage G20 Leadership

Use South Africa's presidency of the G20 to advocate for agricultural interests, emphasise the sector's role in global food security, and promote climate adaptation strategies. This platform along with existing forums such as BRICS and ASEAN can also help in negotiations to reduce trade barriers and enhance global cooperation.

Economics and Trade COE - Trade Policy Status Indicators

Summary of key trade policies impacting South African agriculture

Policy	Type	Current Status & Agricultural Relevance
AfCFTA (African Continental Free Trade Area)	Continental (AU)	Partially Operational: SA joined the Guided Trade Initiative (Jan 2024); trade in Category A goods can proceed with 12 compliant states. Digital trade tools like the Africa Trade Gateway and e-tariff book are active. SPS/TBT portals and Category B/C negotiations underway
TFTA (Tripartite FTA – SADC, EAC, COMESA)	Continental (AU)	Pending Activation: 14th ratification secured; legally in force but not yet active for agriculture exporters
SADC FTA	Regional (SADC)	Operational: Continued intra-regional trade benefits for SA agriculture.
SACU (Southern African Customs Union)	Regional (SADC)	Challenged: Border closures (Namibia, Botswana) affecting fresh produce. Legal clarity pending. SACU exploring resolution.
EU-SA (TDCA)	Bilateral (EU)	Preferential access to EU markets for South African goods, including agricultural exports, under the Trade, Development and Cooperation Agreement.
EU-SADC EPA (Economic Partnership Agreement)	Bilateral (EU)	Stalled Review: EU opposes comprehensive scope revision. SA's agriculture TRQ concerns remain unresolved. WTO citrus disputes underway (False Codling Moth, Citrus Black Spot).
SACU-India PTA	Bilateral (Asia)	Uncertain: India seeks full FTA. Negotiations lack momentum. No preferential agriculture trade terms yet.
AGOA (Africa Growth and Opportunity Act, US)	Bilateral (US)	In Flux: 2025 update expected. SPS issues persist. Political eligibility risks still present.
BRICS+	Multilateral (Emerging Powers)	Strategic Potential: Growing influence (50% of global agricultural trade) but low intra-BRICS trade. 2024 expansion brings new partners. Agribusiness WG advancing SPS/tariff reform agenda.
WTO Disputes: SA-EU	Multilateral (WTO)	Legal Process Active: SA citrus cases (FCM, CBS) in adjudication. Panels expected to begin in 2025. May allow SA countermeasures if EU refuses compliance.



Economics and Trade COE - Tariff and Non-tariff

		SA's Competitors							
		SA	Australia	New Zealand	Peru	Chile	Argentina	Uruguay	Brazil
Strategic Markets	China		FTA & EIA	FTA & EIA	FTA & EIA	FTA & EIA			
	Hong Kong		FTA & EIA	FTA & EIA		FTA & EIA			
	India		FTA & EIA			PSA	PSA	PSA	PSA
	Indonesia		FTA & EIA	FTA & EIA		FTA			
	Japan	GSTP	FTA & EIA	FTA	FTA & EIA	FTA & EIA	GSTP		
	South Korea		FTA & EIA	FTA & EIA	FTA & EIA	FTA & EIA			
	Malaysia		FTA & EIA	FTA & EIA	FTA	FTA			
	Philippines		FTA & EIA	FTA & EIA					
	Thailand		FTA & EIA	FTA & EIA	EHP	FTA & EIA			
	Vietnam		FTA & EIA	FTA & EIA	FTA	FTA			

GSTP: Global System of Trade Preferences among developing countries
EIA: Economic Intergration Agreement (refers to services, capital and/or people)
FTA: Free Trade Agreement (refers to goods)
PSA: Partial Scope Agreement
EHP: Early Harvest Program/Interim agreement

No agreement signed / Not publicly available
Ongoing Negotiations
Negotiations finalised

FRUIT	China	India	Russia
Apples	10%	50%	5%
Avocado/Apricot	25%	30%	4%
Grapefruit	12% / 11%	25% / 30%	4%
Grapes	40% / 13%	20% / 30%	0%
Lemons/Pears	11% / 12%	30% / 25%	4%
Litchi	21%	24%	3%
Nectarine/Peach	10%	30%	0%
Mango	15%	30%	3%
Orange	11%	30%	0%

Source: BFAP 2024



TELECOMMS

Economics and Trade COE - Telecommunication - Subcommittee

Chairman:

Heinie du Toit

Functionary:

Jolanda Andrag

Economics and Trade COE - Telecommunication - Focus Areas

1



Telecommunication
intelligence

2



Policy and
legal affairs

3



Advocacy

Proposed Policy Direction of ICASA

Rural digital reception and connectivity infrastructure



Thank you