IDENTIFYING POTENTIAL EXPORT OPPORTUNITIES FOR SOUTH AFRICAN AGRICULTURE: A FOCUS ON EAST ASIA

by

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Abstract

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This study constitutes one of the first attempts in understanding the importance of the different export destinations and export commodities for the South African agriculture. This knowledge of agricultural trade movements will now make it possible to reprioritise efforts in an agricultural export promotion strategy. The study uses a technique called the growth-share matrix, which maps countries according to their significance in South Africa’s current agricultural export picture (share) and the rate at which they are becoming increasingly more or less significant (growth) in South Africa’s agricultural trade. An analysis of agricultural export share and growth shows that traditional export products and countries are still important, though declining steadily. Major shifts have taken place over the last decade, but especially after 1993 (post-sanction period). High growth export destinations have grown from a $3\frac{1}{2}\%$ share to an almost $30\%$ share (1992 to 1996). High growth export products have grown from a $3\frac{1}{2}\%$ share to a $33\%$ share (1988 to 1996). The European Union’s importance as an export destination has systematically diminished. Africa’s importance has dramatically increased during the sanction years, but levelled off
after 1993, yet retained a high base. South Africa's greatest export growth opportunities are in countries in Asia and the Americas.

The East Asian markets were explored because dramatic changes occurred in these markets resulting in new opportunities. From a historical trade perspective they were identified to perform well. However, it was especially the future trends that made East Asia an attractive market to study because of the enormous potential growth prospects, policy changes, varying consumption patterns and demographic factors. The fast growth in Asia and globalisation will draw resources away from agriculture in these economies and create agricultural markets as a result of a shift in their comparative advantages. Most of the world's fixed investment is in Asia and over the next two decades 50% of the worldwide growth will occur in Asia. Before 1996 the Asian region accounted for about 70% of the increase in the global consumption of commodities. It is especially the East Asian economies that have experienced sustained rapid growth over the past half century.

Changes in consumption patterns are mainly determined by income changes in the developing countries of East Asia. The rapid industrialisation in these economies, higher incomes and several social trends resulted in a significant shift in diet- and eating habits towards western-style foods, high-quality- and high-protein foods and convenience- and health products. Generally consumer demands are roughly the same everywhere: more convenient- and nutritious foods at a lower cost. The modernisation of the retailing and food-service sectors and the opening of the economy also resulted in new markets. New free-trade agreements in South East Asia and Asia Pacific, the next World Trade Organisation negotiations and reforms in East Asia because of the currency crisis, will accelerate the opening up of these economies.

The need has arisen for South Africa to extend its strategic focus to the non-traditional markets of the East. Relations with these countries providing new markets will stimulate future export potential.
Uittreksel

IDENTIFISERING VAN POTENSIËLE UITVOERGELEENTHEDE VIR DIE SUID-AFRIKAANSE LANDBOU: 'N FOKUS OP OOS-ASIË

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Hierdie studie is een van die eerste pogings om die belangrikheid van verskillende uitvoerlande en uitvoerprodukte vir die Suid-Afrikaanse landboubedryf te verstaan. Hierdie inligting van landbou handelstendense maak dit moontlik om verdere werk op 'n uitvoerstrategie te prioriteer. Die studie gebruik 'n tegniek genaamd 'n 'groei-aandeel' matriks waarvolgens lande gerangskik word volgens hulle belangrikheid in landbou uitvoeraandeel asook die koers wat eentjie uitvoerbestemmings (lande) belangrik of minder belangrik vir Suid-Afrikaanse landbouhandel word. Ontleding van die landbou uitvoeraandeel en die groei van die aandeel het uitgewys dat tradisionele uitvoerprodukte en lande steeds belangrik is, maar dat dit aan die afneem is. Groot veranderinge het plaasgevind oor die laaste dekade, maar veral na 1993 toe sanksies opgehef is. Geselekteerde hoëgroei uitvoerbestemmings het gegroei in hulle aandeel van uitvoere van 'n 3½% in 1992 tot ongeveer 'n 30% aandeel in 1996. Geselekteerde hoëgroei uitvoerprodukte het gegroei van 'n 3½% in 1988 tot 'n 33% aandeel in 1996.

Die uitvoeraandeel van die Europese Unie het sistematies afgeneem in belangrikheid. Uitvoere na Afrika se aandeel het dramaties toegeneem gedurende die sanksiejare en 'n
plato bereik op 'n hoë vlak. Suid-Afrika se belowendste geleentheid word gesien in die groeimarkte van Asië en die Amerika's.

Die Oos-Asiatiese lande is nagevors omdat groot veranderinge plaasgevind het in hierdie markte wat gelei het tot nuwe markgeleenthede. Vanuit 'n historiese handelsoogpunt het hierdie lande goed presteer, maar dit was egter toekomstendense wat Oos-Asië 'n aantreklike mark maak. Belangrikste faktore is die groot groeipotensiaal, beleidsveranderinge, veranderinge in verbruikerspatrone en demografiese faktore. Die vinnige groei in Asië en globalisering sal veroorsaak dat hulpbronne onttrek van landbou weens veranderinge in vergelykende voordeel, en wat tot gevolg sal hé dat nuwe markte ontstaan. In die volgende twee dekades sal die meeste van die wêreld se vaste-investering en 50% van die wêreldwyse groei in Asië geskied. Tot 1996 was 70% van die toename in wêreldvoedselverbruik in Asië. Veral die Oos-Asiatiese ekonomieë het volgehoue, vinnige groei gehad die afgelope 50 jaar.

Veranderinge in verbruikerspatrone was meestal die gevolg van verbeterde inkomste in ontwikkelende Oos-Asië. Die vinnige industrialisering in hierdie ekonomieë, toenemende inkomste en verskeie sosiale tendense het gelei tot verandering in die eetgewoontes na meer westerse voedselsoorte, hoëwaarde- en hoëproteïnenvoedsel en gerieflike en gesondheidsprodukte. Oor die algemeen is verbruikersaanvraag oral dieselfde: meer gerief en voedingswaarde teen laer pryse. Modernisering van die kleinhandel en voedseldiensektore en liberalisering het ook nuwe markte laat ontstaan. Nuwe vryhandelsooreenkomste in Suidoos-Asië en die Stille Oseaan, die volgende onderhandelingsronde van die Wêreld Handels Organisasie (WHO) en hervormings in Oos-Asië weens die ruilhandelskrisis sal die liberalisering van hierdie ekonomieë versnel.

Die behoefte het ontstaan vir Suid-Afrika om sy strategiese fokus uit te brei na die nie-tradisionele markte van die Ooste. Verhoudings met hierdie lande sal nuwe markte voorsien, wat toekomstige uitvoerpotensiaal kan verbeter.
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