

# Agriculture, forestry and fisheries in South Africa

## 南非农林渔业

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# INTRODUCTION 介绍

- Agriculture is the most diverse and productive source of economy in Africa  
农业是非洲最多样化和最富有成效的经济来源
- In South Africa, the National Development Plan (NDP) 2030 views Agriculture as the primary economic activity in 1 million jobs rural areas of South Africa with the potential of creating close to by 2030 在南非2030国家发展计划 (NDP) 中，农业作为农村地区的主要经济活动，有可能在2030年前为南非创造100万个就业机会。
- Focusing on 专注于:
  - Revitalizing agriculture and the agro-processing value chain 振兴农业和农业加工价值链
  - Operation Phakisa aimed growing the ocean economy and other sectors 旨在发展海洋经济和其他方面的Phakisa行动
- The Agricultural Policy Action Plan seeks to ensure the implementation of the NDP 农业政策行动计划确保国家发展计划的实施



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# South Africa Agriculture 南非农业

- South Africa (SA) has dual agriculture system
- 南非 (SA) 的双重农业体系
  - ✓ Commercial 商业型
  - ✓ Small scale 小型
- Agriculture, Forestry and Fisheries (AFF) sectors have a number of commonalities, but also face distinct challenges and offer diverse opportunities 农业, 林业和渔业 (AFF) 部门有许多共同点, 但也面临着不同的挑战, 提供了各种各样的机会
- **Contribute to food security, economic growth and job-creation, and market access 促进粮食安全, 经济增长和创造就业机会以及市场准入**
- AFF is the largest employer for rural areas, with agro-processing having a bulk of additional employment opportunities 农业, 林业和渔业是农村地区最大的就业市场, 农业加工提供大量额外的就业机会
- **Value chain central to government's rural development and small holder farmer development objectives 价值链是政府农村发展和小农户发展目标的核心**



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# South Africa-China Agriculture Relation

## 中南农业关系

- Increasing for the past 21 years:过去21年间不断提升
- Different MoU and agreements has been signed including 签署了不同的谅解备忘录和协议, 包括:
  - ✓ MoU on Agriculture Cooperation (Joint Working Group (JWG) established; promote scientific, technological, economic and trade cooperation) 农业合作谅解备忘录, 建立了旨在促进科学, 技术, 经济和贸易合作的联合工作组
  - ✓ MoU on Aquaculture Development and Cooperation 水产发展和合作谅解备忘录
  - ✓ MoU on Cooperation in the Field of Forestry 林产发展谅解备忘录
  - ✓ Agreement on Sanitary and PhytoSanitary (SPS) cooperation (primary market access) 卫生和植物卫生合作协议 (初级产品市场准入)
- Research and development collaboration 研发合作
- Capacity building and training collaboration 能力建设和培训合作



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# Existing trade cooperation 当前贸易合作

- China's is South Africa major trading partner and major investor for Agriculture, Forestry and Fisheries and agro-processing products 中国是南非的主要贸易伙伴和农业，林业和渔业及农产品加工产品的主要投资者
- There is no trade agreement and trade is conducted under the most favoured nation basis 没有贸易协定，贸易是在最惠国的基础上进行的
  - ✓ **Protocols concluded for plant products:** table grapes, citrus, tobacco, maize and apples, lucerne (alfa alfa) 植物产品议定书包括：葡萄，柑橘，烟叶，玉米，苹果和苜蓿草
  - ✓ **Health certificates concluded:** beef, different animals, giraffes, wool and mohair, fishmeal and fish oil for animal use, raw hides and skins, other animals 卫生证书包括：牛肉，不同的动物，长颈鹿，羊毛和马海毛，动物用鱼粉和鱼油，生皮和其他动物
  - ✓ **Aquaculture:** frozen aquatic products 水产：冷冻水产品
  - ✓ **Processed agricultural:** wines, juices, raisins (limited), nuts, cereals (limited), rooibos tea, seafood, fishmeal, etc. 加工农产品：葡萄酒，果汁，葡萄干（限定），坚果，谷物（限定），如意宝茶，海鲜，鱼粉等。

**Conditions are dynamic and highly influenced by the occurrence of diseases, pest and food safety 疫病，害虫和食品安全在很大程度上影响着准入条件产生变动**

- There is also a need to optimize some of the exports products to increase trade 某些出口产品还需要优化以增加贸易



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## Top export products from SA to China 南非对华主要出口产品

- Chemical Wood pulp, Dissolving Grades 漂白木浆, 溶解级
- Wool 羊毛
- Chemical Wood pulp, Soda 漂白木碱木浆
- Wine 葡萄酒
- Oranges 橙子
- Flour Meal & Pellet Of Fish 面食和鱼丸
- Sheep, Lamb Skins 羊,羔羊皮
- Whole Hides & Skins 整皮
- Rock Lobster 岩龙虾

## Top import products from China 中国对南主要出口产品

- Rice, 大米
- Animal Guts 动物肠子
- Apple Juice 苹果汁
- Peptones 蛋白胨
- Kidney & White Pea Beans 芸豆和白豌豆
- Tomato Paste 番茄酱
- Printed Books 印刷书籍
- Paper & Paperboard 纸和纸板
- Sardines 沙丁鱼
- Articles Of Wood 木材



# South Africa's AFF trade balance with China (2015-2018) (Rand Billion) 1 US \$ = ZAR 14.00

中南农林渔贸易差额

(2015-2018) (单位: 十亿兰特) 1美元=14,00兰特

	SA AFF Trade Balance with China: 2015 – 2018 中南农林渔贸易差额 : 2015-2018 SA Rand Billion 南非兰特 (十亿)			
	2015	2016	2017	2018
Imports进口	6,61	7,41	6,97	6,98
Exports出口	9,12	10,30	10,29	12,77
Balance差额	2,50	2,89	3,32	5,80

For the period 2015 to 2018, SA had an average positive Agriculture, forestry, and fisheries (AFF) trade balance with China.

在2015年至2018年期间, 南非与中国的农业, 林业和渔业贸易平均都是贸易顺差。



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# SA wine export to China

## 南非葡萄酒对华出口

- SA Wine exports to China for the period 2015 to 2018 was on average R9.65billion
- 2015年至2018年期间，南非向中国出口的葡萄酒平均为96.5亿兰特
- China ranked 5<sup>th</sup> as SA's wine exports destination in the World

中国是南非第五大葡萄酒进口国

- ✓ with an average value of R0.5billion, and
- ✓ an average share of 5.2% to the total SA wine exports to the World.
- ✓ 平均价值5亿兰特，占南非世界葡萄酒出口总量的5.2%。



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# SA Beef Export To China

## 南非牛肉对华出口

- South Africa get approval for the market access of beef into China in 2017
- 南非牛肉于2017年获得中国市场准入
- The value of SA's exports of Frozen meat of bovine (HS0202) to China has increased from R81 723 002 in 2018 is R403 million (**US \$ 28.81 million**)
- 南非对华出口冷冻牛肉（HS0202）从2018年的81,723,002兰特增加到了4,03千万兰特（2881万美元）
- Constituting 46% of the total SA frozen beef exports to the World
- 占南非全球冷冻牛肉出品量的46%



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# Potential products for Future China Market

South Africa identified value added products for the Chinese market (new markets) 南非确定的针对中国市场的增值产品（新市场）

- Pears 梨
- Avocadoes and other fruits, etc. 牛油果及其它水果等
- Soya beans大豆
- dairy products 乳制品
- Pork 猪肉
- Live cows, horses, etc. 活牛, 马等
- Some cloven hooved games (e.g. antelopes)某些偶蹄野生动物, 如羚羊等
- Aquaculture products, and others. 水产品及其他



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# Investments opportunities 投资机会

- Agro-processing 农业加工
  - ✓ Forestry (pulp – paper products) 林业 (纸浆 - 纸制品)
  - ✓ Beverages: fruit juices, packaging and export of indigenous teas  
饮料: 果汁, 包装和本土茶叶出口
  - ✓ High value natural fibers: organic cotton & downstream mohair production 高价值天然纤维: 有机棉和下游马海毛生产
- Fisheries and aquaculture i.e. freshwater or marine aquaculture 渔业和水产养殖, 即淡水或海水养殖
- Food processing in the milling and baking industries, and others 制粉和烘焙行业的食品加工等
- High value organic and other food, fruits, nuts, etc. for the local and export market 为当地和出口市场提供高价值的有机食品和其他食品, 水果, 坚果等
- Biofuels production: biodiesel & bioethanol 生物燃料生产: 生物柴油和生物乙醇
- There are incentives provided by SA depending on the type of investments 南非根据投资类型提供激励措施



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THANK YOU

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