



Western Cape Trade Flows & Developments 2022

November 2023



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CEO FOREWORD

*If it comes from the Southern tip of Africa, nurtured by the sun and a two oceans' breeze.
If it thrives like a thousand floral species, grown by skilled hands, with respect and expertise.
If it's rooted in land rich and fruitful, inspired by beauty and a spirit of 'what if'.
If it innovates to make lives better, produced with pride right here where we live.
If it's created to be world class quality, you can trust it's as good as others say.
If it's driven by a love of local, it's Made in the Western Cape.*

Every export tells a story of its origin; every product tells a story of place. Above is the brand story for the “Made in the Cape” export marketing campaign, and I believe it goes a long way in encapsulating the spirit of Western Cape products and services.

At Wesgro, the official tourism, trade and investment promotion agency for the Western Cape, we are passionate, not only about growing exports, but also about the story that our exports have to tell.

Quality, sustainability, diversity, and trust define our brand promise. It is what you can expect when you buy from the Western Cape.

The Western Cape has proven export competitiveness. In 2022 South Africa was the largest exporter of food and beverages in Africa - almost 40% of these originate from the Western Cape, 4% of world wine production happens in the Western Cape and 95% of all South African wines come from the Western Cape. South Africa is the second largest global producer of luxury catamarans, second only to France, with the Western Cape accounting for more than two thirds of marine manufacturing in the country. One million bottles of South African wine are sold globally per day. The Cape is one of the most diverse regions for high quality wines - evidenced by a multitude of international awards. Our rooibos, honeybush and fynbos-infused natural products are unique in the world. Advances in technology are enabling vast new opportunities in services exports, from architecture to animation, software to financial services. As a services-led economy, the Western Cape is well positioned to keep increasing its international market share in services industries.

It is our mission as an Agency to grow Western Cape exports of goods and services. Strong relationships have been built with our longstanding export markets. We will continue to nurture these and, in order to grow even further, we will cast a wider net to include markets such as China, ASEAN, and Middle East.

Wesgro will continue to innovate in the way that we approach trade. By further leveraging technology and the ‘region of origin’ brand, Made in the Cape, we continue to connect more exporters with more buyers, including a dedicated focus on the services sector. Wesgro’s focus will also include factors influencing export competitiveness, including market access, and increased climate related regulations.

Our commitment to driving the Western Cape’s Growth for Jobs strategy and achieving key objectives remains unwavering. Our laser focus is on achieving breakout, inclusive, economic growth in the Western Cape.

Wrenelle Stander
Chief Executive Officer, Wesgro

1. Executive Summary

Global trade showed 'resilience' in 2022, despite the impact of the ongoing conflict between Russia and the Ukraine. In April 2023 the World Trade Organisation (WTO) predicted slightly improved growth in global trade in 2023, and marginally higher than published in the October 2022 forecast. However, trade expansion is expected to be subpar in 2023, with global trade negatively affected by the ongoing conflict, persistent high inflation, tighter monetary policies, and financial uncertainty.

Despite challenging global economic conditions and a myriad of uncertainties, South Africa recorded an increase in both the value of exports and imports in 2022, albeit that export growth was lower than recorded in 2021. This resulted in a narrowing of the trade surplus which can be attributed in part to declining export values in the fourth quarter of 2022 on the back of lower mining exports values, that of mineral products in particular, according to the South African Reserve Bank (SARB). The Transnet strike in October 2022, which disrupted rail freight and port operations, placed further pressure on export volumes. The value of mining exports was also impacted by a decline in select global commodity prices in the fourth quarter of 2022.

Similarly, the Western Cape recorded an increase in the value of exports and imports in 2022, with both increases driven in part by the growth in global oil/energy prices, noting that oil-related products constitute a large share of the province's exports and imports. However, the province's trade deficit widened in the last quarter of 2022, as the value of exports declined considerably owing in part to ongoing logistics challenges at the port of Cape Town which posed significant and costly challenges for agricultural exports.

This report provides an overview of trade flows and trade developments in the Western Cape in 2022.

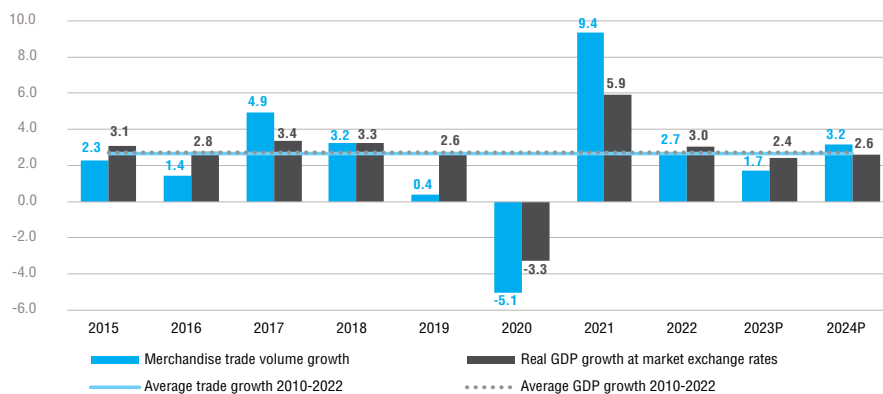
2. Global Context

2.1 Trade volume

In its April 2023 Global Trade Outlook¹, the WTO estimated that growth in the volume of global trade will slow to 1.7% in 2023, down from 2.7% recorded in 2022, noting that this forecast was 0.7% higher than previously predicted by the multilateral organisation for 2023 in its October 2022 outlook. In 2024, trade growth is expected to rebound to 3.2%, as global GDP growth improves slightly to 2.6%. The WTO noted however that these forecasts are subject to downside risks, mounting geopolitical tensions, global food insecurity, the possibility of unforeseen fallout from monetary tightening, risks to financial stability, and increasing levels of debt.

Chart 1: World Merchandise Trade Volume and GDP growth, 2015–2024f

Annual % change



Source: World Trade Organisation, 2023

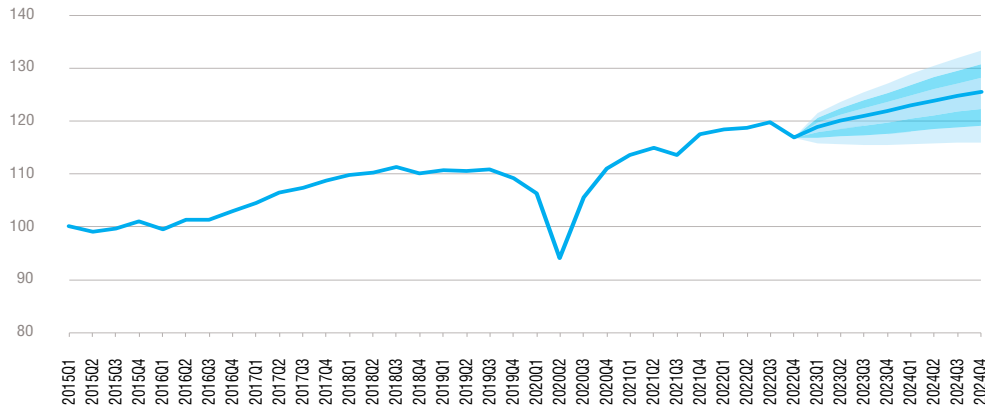
Growth in trade volume recorded in 2022 despite declines in the fourth quarter

Growth in the volume of global trade averaged 4.2% in the first three quarters of 2022 but declined by 2.4% quarter-on-quarter in the fourth quarter, resulting in a trade growth rate of 2.7% year-on-year for 2022. These results were weaker than the WTO's October forecast of 3.5% but closer to the earlier estimate of 3.0% from April 2022, which relied on simulations to estimate the economic impact of the ongoing Ukraine/Russia conflict. Several factors underlie the decline seen in the fourth quarter of 2022, with one of the most notable being the rise in global commodity prices. Even though food and energy prices had come down from their post-war peaks by quarter four of 2022, these remained high by historical standards and continued to have a negative effect on real incomes and import demand.

1 World Trade Organization, (2023), 'Global Trade Outlook and Statistics Report'. Accessed: https://www.wto.org/english/res_e/publications_e/trade_outlook23_e.htm

Chart 2: Volume of World Merchandise Trade, 2015Q–2024Q4

Seasonally-adjusted volume index, 2015= 100



Note: The shaded region represents both random variation and subjective assessment of risk.
Source: WTO and UNCTAD for historical data, WTO Secretariat estimates for forecasts.

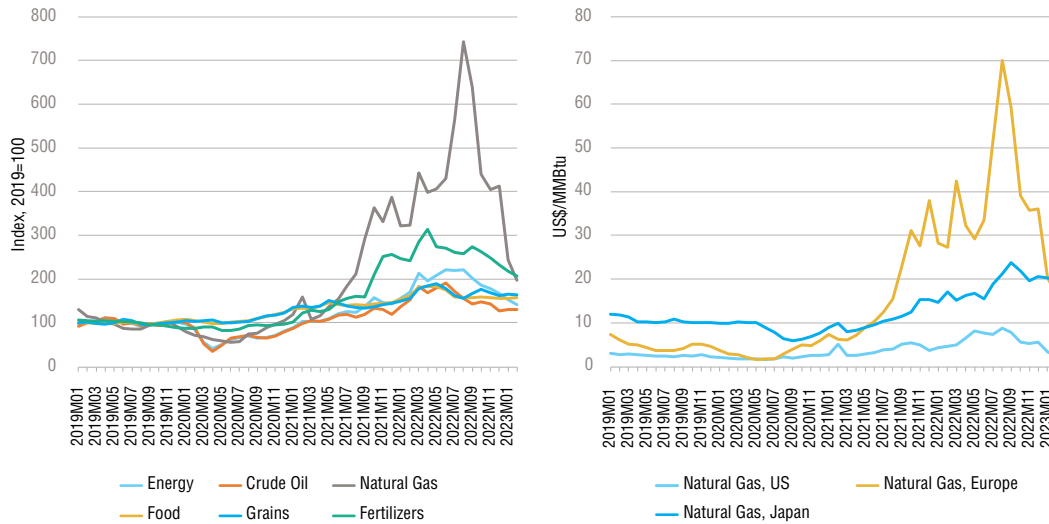
Source: World Trade Organisation, 2023

Prices of commodities

Trade volumes in 2022 were strongly influenced by commodity price developments. The price of European natural gas increased by 48% between January and August 2022, and plunged by 76% by February 2023 (see Chart 3). Similarly, the price of food commodities fluctuated in 2022, jumping by 19% between January and May before falling by 15% between May and December. Over the course of 2022, food prices increased by 18% compared to 2021, including a 21% rise in grain prices. An even greater increase was recorded for the price of fertilisers in 2022, which increased by 63% y-o-y.

Chart 3: Global Average Primary Commodity Prices, January 2019–February 2023

Index 2019=100 and US\$ per million Btu



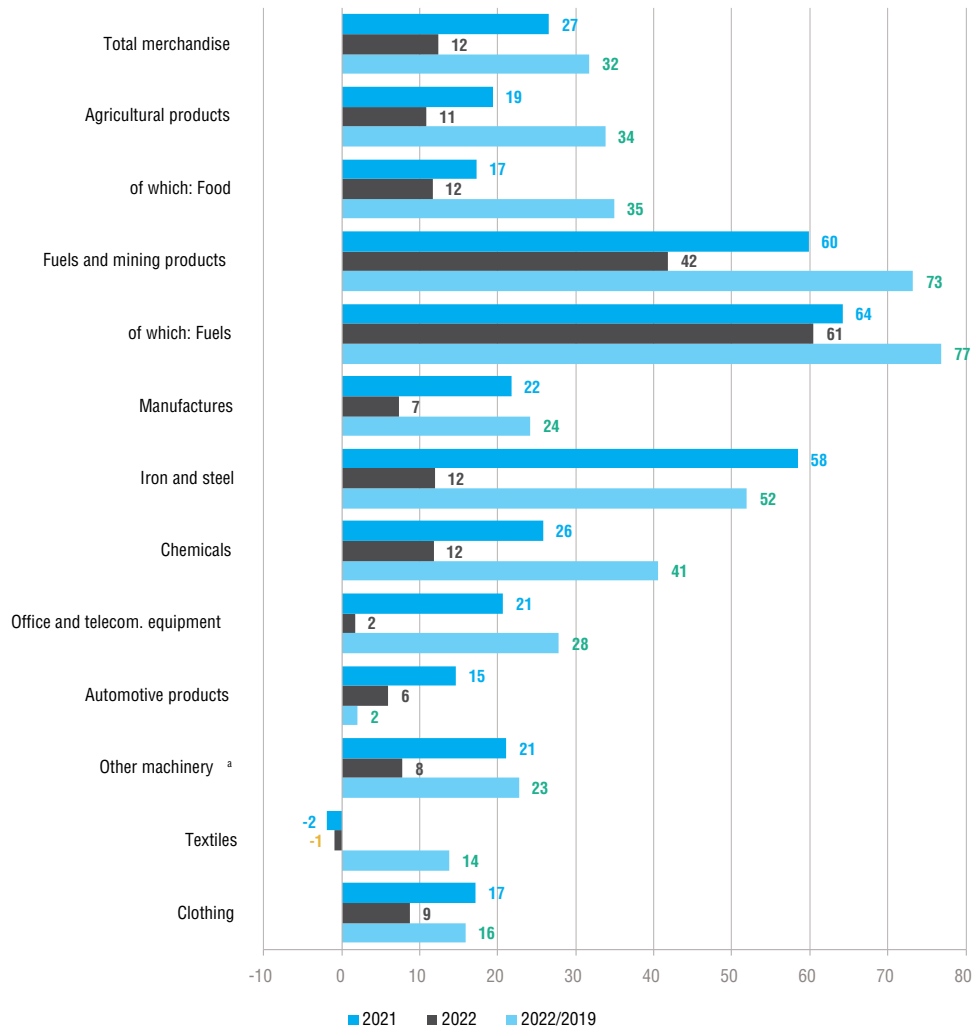
Source: World Trade Organisation, 2023

2.2 Trade value

The total value of global goods trade increased by 12% y-o-y to USD25.3 trn in 2022, inflated in part by high global commodity prices (WTO, 2022), as shown in Chart 4 below. This growth was less than that recorded in 2021, when goods trade rebounded by 27% following a 5.3% decline recorded in 2020. However, the growth was 32% higher than pre-pandemic levels recorded in 2019. Energy sectors experienced the fastest growth in trade in 2022, with fuel trade growing by 61% y-o-y according to the WTO. The value of agricultural trade increased by 11% and manufactured goods by 7%. Within manufacturing, automotive products grew by 6%, and clothing by 9%.

Chart 4: Year-on-Year Growth in World Merchandise Trade by Product, 2021–2022

% change in US\$ values



Source: World Trade Organisation, 2023

Findings from a WTO² assessment of global trade and developments after one year of warfare in Ukraine

The WTO study examined how countries that were dependent on Russian or Ukrainian exports of agricultural and primary goods responded to the crisis, and how prices and trade in goods, which were greatly affected by the war, have been influenced.

Increased trade values and stable trade volumes

Key agricultural and industrial goods traded in the Ukraine and Russia, and identified by the WTO, were wheat, maize, sunflower products, fertilisers, fuels and palladium. Trade values for these commodities increased sharply, largely driven by price increases. This is shown by the changes in unit values, demonstrated in Chart 5. For example, between January and October 2022, prices for palladium and maize rose by 4.4% and 24.2% respectively. However, trade volumes remained fairly stable. According to the WTO, while these price increases are substantial, they are significantly lower than some scenarios that had been predicted at the onset of the conflict. This was partly due to the restraint in the imposition of export restrictions. In addition, if there had been restrictions on food exports, prices for wheat could have increased by up to 85% in some regions. The WTO concluded that the impact of the war on prices has been comparably minor so far.

2 World Trade Organization, (2023), 'One year of war in Ukraine: Assessing the impact on global trade and development – Report'. Accessed: https://www.wto.org/english/news_e/news23_e/publ_23feb23_e.htm

Chart 5: Changes in Value and Volume of World Trade by Product, January 2019–October 2022

	Mar-Oct year-on-year change (in %)	Mar-Oct change vs 2019 average (in %)	Change between January 2022 and October 2022 (in %)
Wheat			
Value	-0.2	79.3	24.0
Unit value	11.9	122.2	17.0
Volume	-27.7	-18.7	5.9
Maize			
Value	-2.8	88.7	-12.3
Unit value	-0.1	93.4	24.2
Volume	-22.2	-2.4	-29.4
Sunflower oil			
Value	5.0	112.9	-13.2
Unit value	27.6	175.0	6.9
Volume	-37.2	-22.4	-18.8
Rapeseed oil			
Value	-11.5	112.9	27.9
Unit value	0.8	141.5	-3.7
Volume	-26.8	-7.5	32.8
Fertilizers			
Value	23.2	130.7	20.1
Unit value	27.6	175.0	6.9
Volume	-23.8	-15.7	12.4
Rice			
Value	5.0	41.7	10.9
Unit value	-20.5	4.8	1.1
Volume	4.9	34.8	9.7
Fuels			
Value	28.0	88.7	11.4
Unit value	31.3	108.6	20.5
Volume	-21.9	-9.6	-7.6
Palladium			
Value	-31.9	34.7	0.4
Unit value	-28.1	46.7	4.4
Volume	-24.8	-8.4	-3.8

Source: WTO estimates. Trade value indices are estimated based on national customs statistics compiled by Trade Data Monitor. Unit value indices are based on World Bank commodity prices. Volume indices are calculated by deflating the value indices by the unit value indices.

Source: World Trade Organisation, 2023

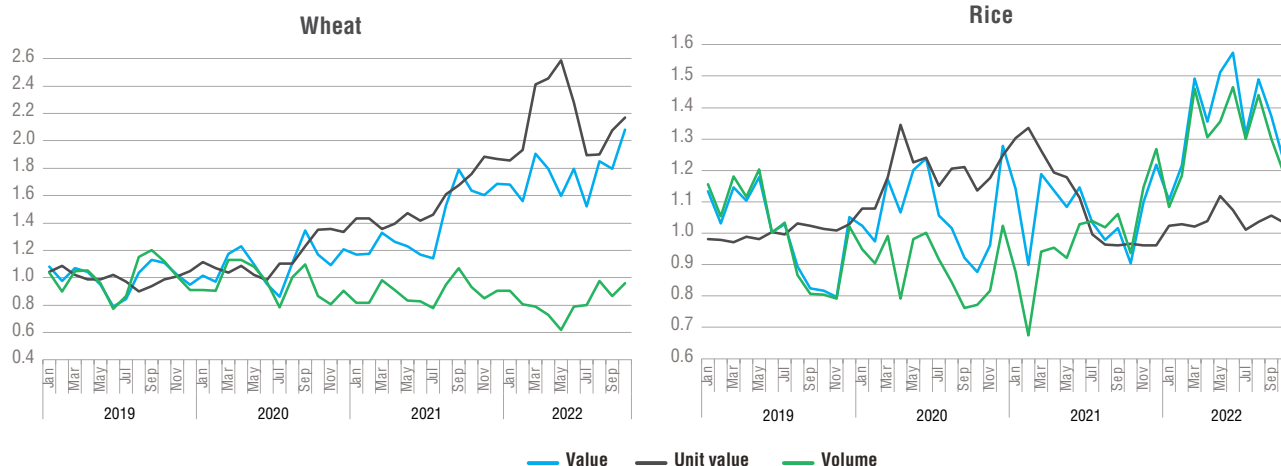
Importers were able to substitute both geographically and across products

As shown in Chart 6, wheat trade volumes fell by 18.7% between March and October 2022 compared to the 2019 average. However, this decline corresponds roughly to increases in the trade of rice (up by 34.8%), which is a suitable substitute. This could imply that countries replaced imports of wheat and maize with comparable products to offset supply disruptions.

Notably, importers also seem to have sourced products from other suppliers. Countries either switched suppliers for the same product or replaced products with substitutes. This required establishing trading relationships with new partners. The WTO attributed this to the substantial flexibility and adaptability of the multilateral trading system.

South Africa’s fertiliser (HS31) import costs from Russia increased by 85.33% y-o-y and the Western Cape’s by 187.39% y-o-y between 2021 and 2022. This implies that South Africa did not substitute Russia as a supplier for this product, nor did South Africa impose any sanctions on Russia. However, some countries who imposed sanctions on Russia, including Italy, Greece and France, still recorded an increase in imports due to the temporary exemption of fuels from the sanctions, coupled with price increases in oil and gas. There was also a significant increase in global fertiliser prices over this period, and this is likely to have been a contributing factor to the significant increase in associated import costs recorded by South Africa and the Western Cape.

Chart 6: Estimated Value and Volume of World Trade in Selected Agriculture-Related Products, January 2019–October 2022



Source: WTO estimates. Trade value indices are estimated based on national customs statistics compiled by Trade Data Monitor. Unit value indices are based on World Bank commodity prices. Volume indices are calculated by deflating the value indices by the unit value indices.

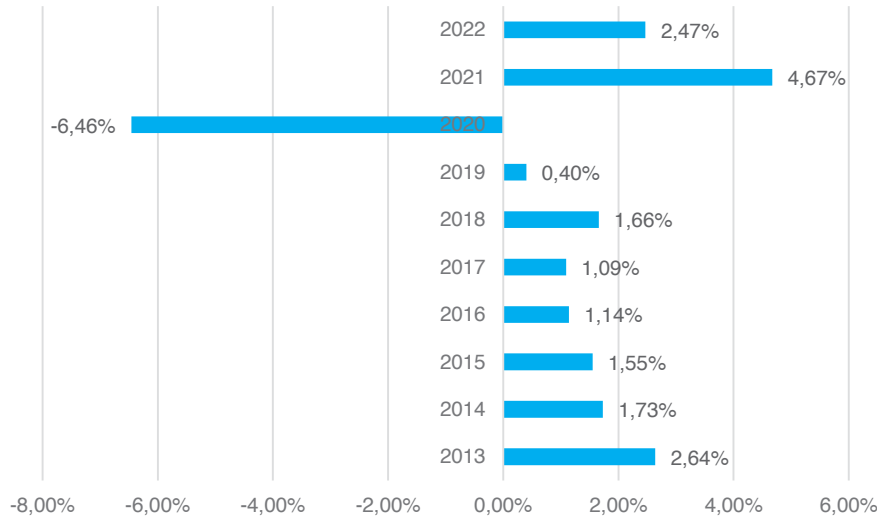
Note: (Indices, 2019 average = 1.0)

3. Western Cape Trade Trends

3.1 Historical economic context

The Western Cape economy grew for a second consecutive year in 2022, expanding by 2.47% y-o-y between 2021 and 2022, from a value of ZAR636.50 bn recorded in 2021 to ZAR652.23 bn in 2022. This was higher than the Western Cape Provincial Treasury’s estimate of 2.2% in its Provincial Economic Review Outlook ³ of September 2022 (see Figure 1).

Figure 1: Western Cape Real GDP Growth Rate, 2013–2022

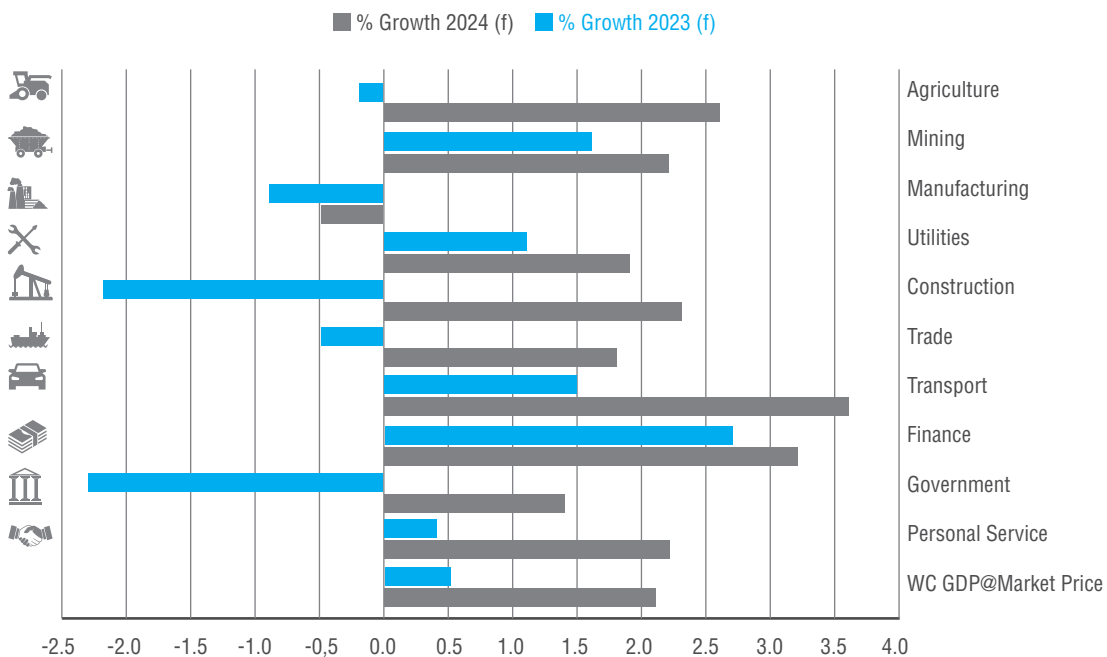


Source: Quantec, 2023. Own calculations.

Note: values are calculated on Gross domestic product (GDP) at market prices

According to the Western Cape Provincial Treasury’s PERO of September 2023⁴, the Western Cape economy is expected to grow by 0.5% in 2023 and by 2.1% in 2024. Positive contributions to growth in 2023 are expected from the transport, finance, personal services, mining and utilities sectors. While the construction, manufacturing, agriculture, trade and government sectors are expected to experience declines. The decline will be as a result of several factors, including government consolidation by the National Treasury affecting both the manufacturing and government sector, while rising input costs and loadshedding will impact the manufacturing sector.

Figure 2: Western Cape Economic Outlook, 2023-2024



Source: Provincial Economic Review and Outlook 2023. Western Cape Government Provincial Treasury

3 2022 PERO: <https://www.westerncape.gov.za/provincial-treasury/pero-mero-and-socio-economic-profiles>

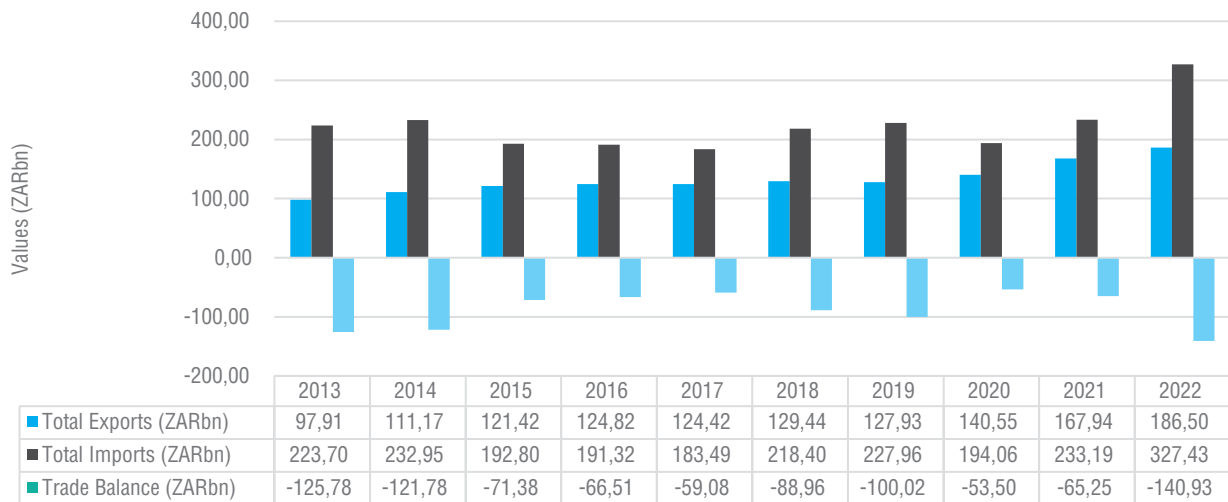
4 2023 PERO: <https://www.westerncape.gov.za/provincial-treasury/sites/provincial>

3.2 Western Cape global trade by values

3.2.1 Annual trade

The Western Cape's bilateral trade flows remained relatively strong in 2022 despite the myriad of economic challenges and geopolitical pressures faced by the global economy. The province's exports totalled ZAR186.50bn in 2022, an increase of 11.05% y-o-y on the ZAR167.94bn earned in 2021. Imports in turn increased by 40.41% y-o-y (underpinned in part to the notable increase in oil prices) to an accumulated cost of ZAR327.43bn in 2022, from up from ZAR233.19bn incurred in 2021. The region's trade balance remained firmly in deficit as a result, widening to a shortfall of ZAR140.93bn in 2022, from ZAR65.25bn recorded in 2021. This is reflected in Figure 3.

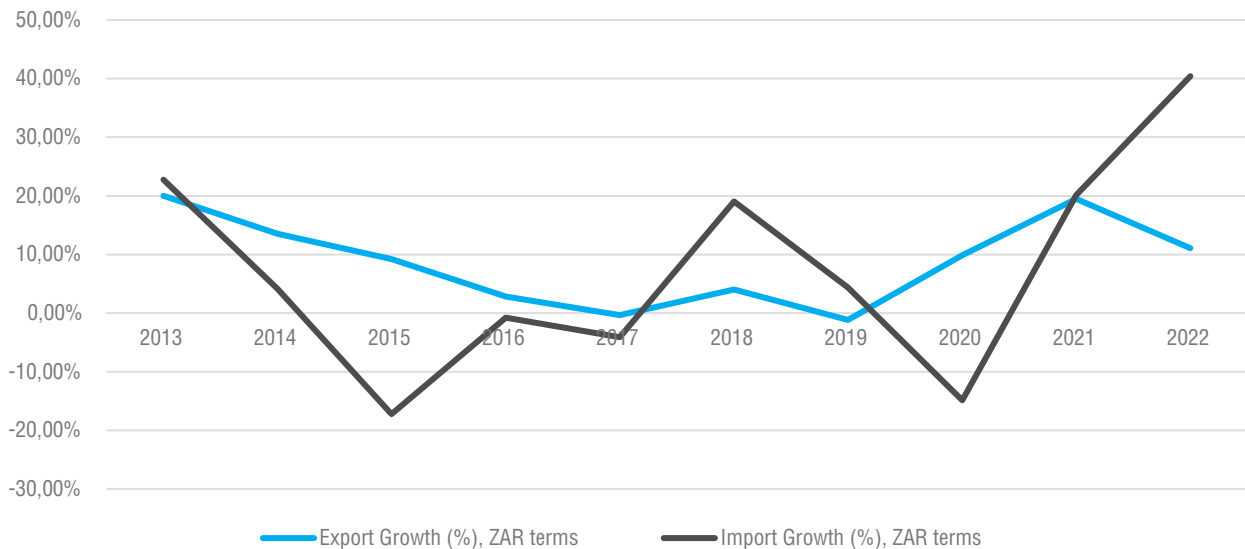
Figure 3: Western Cape Trade Global Trade, 2013–2022



Source: Quantec, 2023

Figure 4 reflects the growth in annual trade for the Western Cape for the period 2013 to 2022. The province's annual export growth averaged 8.85% during the period 2013 to 2022. Import growth (on an annual basis) in turn averaged 7.39% for this period.

Figure 4: Western Cape Global Trade Growth, (%), 2013–2022



Source: Quantec, 2023

3.2.2 Western Cape trade by quarter

The impact of global economic developments was increasingly evident in domestic trade flows in 2022, with the Western Cape seeing notable increases in costs for specific commodities in 2022, those affected by the ongoing conflict between Russia and the Ukraine in particular, including energy and mineral oil prices. The significance of this being that historically, the Western Cape's key export products have been light oils and preparations (HST271012); bituminous coal (HST270112); and a variety of agriculture and agri-processing products. Light oils and preparations are also key import products for the Western Cape.

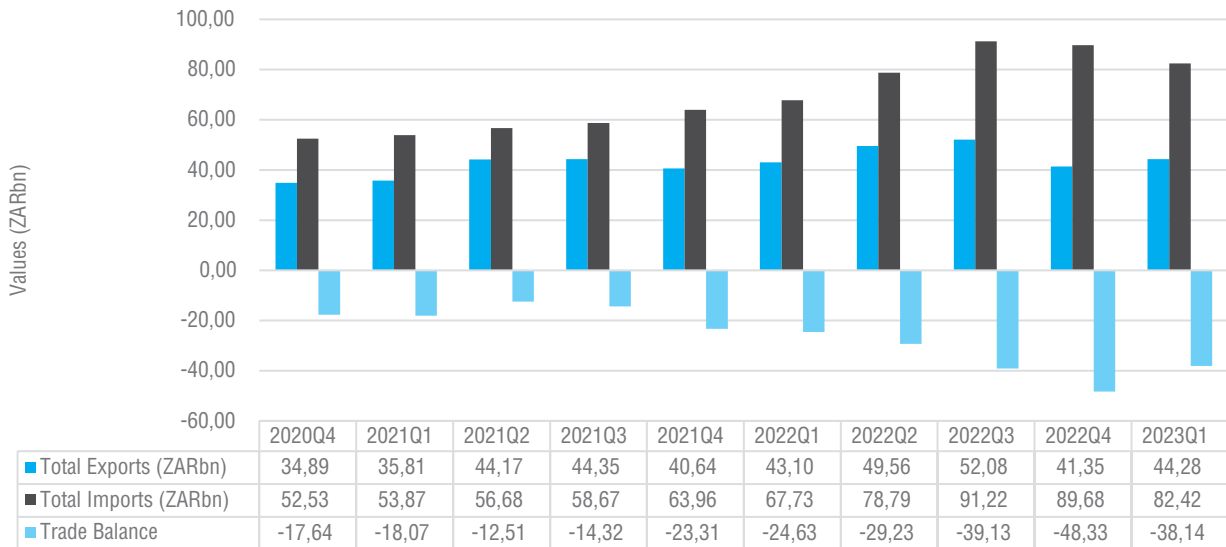
The second quarter of 2022 (2022Q2) saw an increase in both the province's value of exports (14.99% q-o-q) and imports (16.33% q-o-q). By the end of 2022Q2, the conflict between the Ukraine and Russia was well underway, and this led to a surge in energy/oil prices, which in turn translated into a considerable increase in energy-related export earnings (in rand value) for the Western Cape in 2022Q2. These included earnings from light oils and preparations (HS271012) (35.72% q-o-q increase), coal (HST270119) (127.45% q-o-q increase), and bituminous coal (HST270112) (93.76% q-o-q increase). On the import front, light oils and preparations costs (HS271012) increased by 29.72% q-o-q in 2022Q2.

Global energy prices had softened by the third quarter of 2022, resulting in a slowdown in the province's export earnings growth compared to that recorded in 2022Q2. During this period the growth in export earnings decreased by 9.90 percentage points compared to 2022Q2. Export earnings of light oils and preparations declined by 6.90% q-o-q, while other coal export earnings declined by 17.41% q-o-q. Notably, most key agricultural products registered negative export growth in this quarter including export earnings of fresh grapes (HST080610) which declined by a further 98.59% q-o-q; apples (HST080810) fell by 36.23% q-o-q; plums and sloes (HST080940) declined by 99.82% q-o-q; and pears (HST080830) by 58.30% q-o-q. Total imports however increased by 15.77% q-o-q, only 0.56 % points lower than that recorded in 2022Q2. In contrast to oil exports, imports of light oils and preparations grew by 7.81% q-o-q.

The fourth quarter saw significant declines in the province's export earnings, with export earnings slumping by 20.61% q-o-q. Substantial declines were seen in a number of key agricultural exports including wine (HST220421) (-5.96% q-o-q); apples (HST080810) (-53.67% q-o-q); and pears (HST080830) (-41.36% q-o-q). The Agricultural Business Chamber of South Africa (Agbiz) attributed the disruption in the exports of agricultural products to logistical challenges at the port of Cape Town. Table grapes and other deciduous fruit exports were particularly hard hit by these challenges. Exports of light oils and preparations increased by only 6.20% q-o-q.

Of interest on the import front was that the Western Cape resumed crude petroleum oils imports (HST270900) in 2022Q4, having halted the importing of this product at the beginning of the fourth quarter of 2021. These imports totalled ZAR4.85bn in 2022Q4. Two African countries, namely Nigeria and Congo, were the only two source markets for the province's imports of crude oil in the said quarter.

Figure 5: Western Cape Trade, 2020Q4-2023Q1



Source: Quantec, 2023

3.2.3 Annual performance of key traded products (HS6)

Light oils and preparations (HST271012) was the Western Cape's dominant global export product in 2022, which, at a value of ZAR12.52bn accounted for 6.72% of total global export earnings accrued in this year. The presence of an oil refinery in Cape Town and the country's only gas-to-liquid (GTL) refinery in Mossel Bay support the province's relatively high share of exports of mineral fuels and mineral oils in the export basket. The Western Cape accounted for 30.17 % of South Africa's total exports of light oils and preparations (HS271012) in 2022, second only to Gauteng which held the largest share (66.85%) of South Africa's exports of this product in 2022.

The export of fresh grapes (HST080510) followed in second place, which at a value of ZAR10.46bn, accounted for 5.61% of total export earnings in 2022. Oranges (HST080610) were third at a value of ZAR8.42bn (or 4.52%). The export of apples (HST080810), followed at a value of ZAR7.21bn or 3.87% of total exports, while wine in containers holding 2 litres or less (HST220421), was the fifth largest export product at a value of ZAR7.09bn accounting for 3.81% of total export earnings in 2022.

Regarding imports, light oils and preparations (HST271012), at an associated cost of ZAR163.83bn, accounted for more than half of the province's import basket in 2022, representing a 50.04% share of total imports. Crude petroleum oils (HST270900) followed in a distant second place, which at a value of ZAR4.85bn, accounted for 1.48% of total import costs incurred in 2022. Semi-milled or wholly milled rice (HST100630) was third, valued at ZAR3.71bn and accounting for 1.13% of all import costs incurred in 2022.

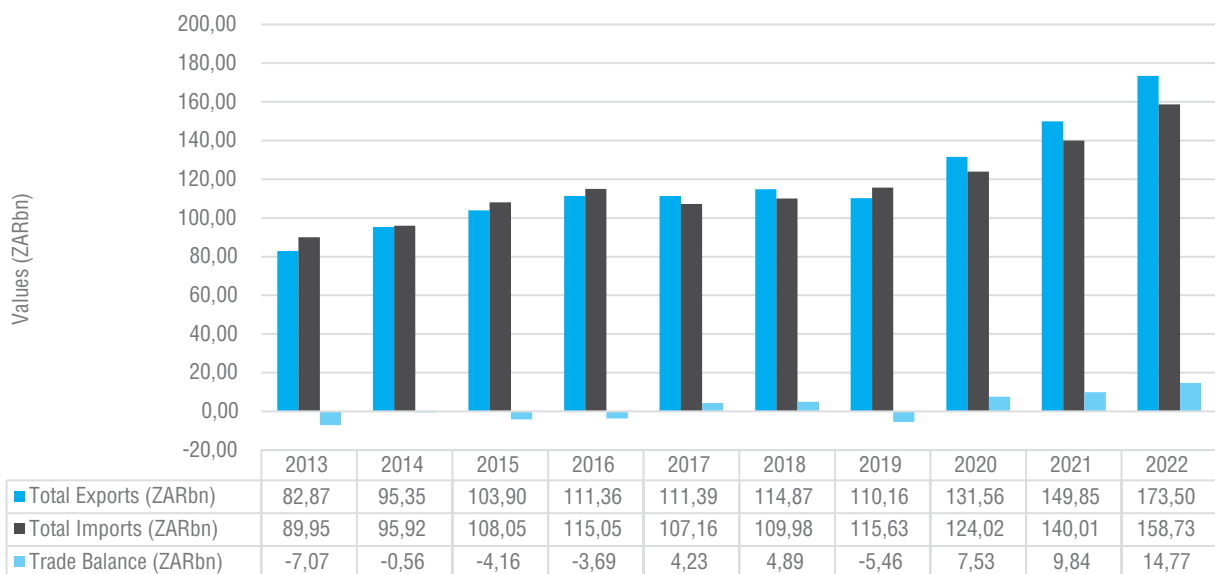
3.2.4 The effects of oil on trade

Figure 6 shows the Western Cape's trade flows excluding petroleum-related exports and imports. This is to give a more balanced view of the province's primary/traditional export and import products. One of the most notable differences is the (new) differential between imports and exports, and by inference, the impact of this on the province's trade balance. As shown below, when excluding petroleum products (both in export and import flows), the trade balance is no longer consistently in deficit throughout the period analysed but oscillates from a surplus to a shortfall several times. This is a key indication of the dominance of petroleum products in the province's trade in both exports and imports products.

In nominal terms, imports associated with crude petroleum oils (HS270900), and light oils and preparations (HS271012) collectively totalled a cost of ZAR168.91bn 2022. This was equivalent to 51.52% of the province's total imports in 2022. The difference was not as noticeable with exports, as exports of light oils and preparations (ZAR12.52bn), and petroleum oils and oils obtained from bituminous minerals, crude (ZAR200.31m) accounted for 6.83% of total export earnings in 2022.

Overall, when excluding petroleum products, the value of the province's total exports decreased marginally to a value of ZAR173.50bn (from ZAR186.50bn including petroleum-related exports), while imports eased to a cost of ZAR158.73bn (from ZAR327.43bn including petroleum-related imports) in 2022. The net effect is a shift in the overall trade balance, from a deficit of ZAR140.93bn (including petroleum products), to a surplus of ZAR14.77bn (excluding petroleum products) in 2022.

Figure 6: Western Cape Global Trade Excluding Oil, 2013–2022



Source: Quantec, 2023

Stabilising of oil prices by the end of 2022

Given the prominence of petroleum-related products in the province's trade basket, developments in global oil prices have a direct and an indirect impact on trade flows – in terms of both export earnings and import costs incurred.

Chart 7: World Bank Commodities Price Data, 2 September 2023 Update

World Bank Commodities Price Data (The Pink Sheet)

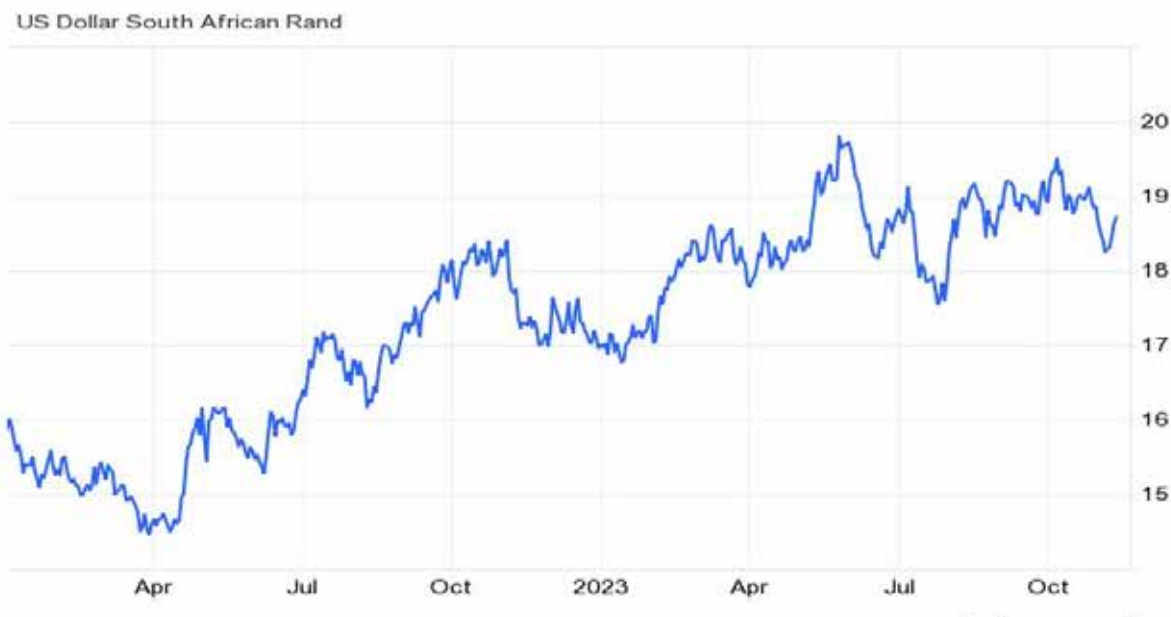
5-Sep-2023

Commodity	Unit		Annual Averages			Quarterly Averages				Monthly Averages			
			Jan-Dec	Jan-Dec	Jan-Dec	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	June	July	August
			2020	2021	2022	2022	2022	2022	2023	2023	2023	2023	2023
Energy													
Coal, Australia **	\$/mt	a/	60.8	138.1	344.9	352.3	413.3	370.4	237.6	164.7	139.4	140.6	152.6
Coal, South Africa **	\$/mt		65.7	119.8	240.6	291.1	259.6	191.8	151.2	111.8	98.6	96.8	97.6
Crude oil, average	\$/bbl		41.3	69.1	97.1	110.1	96.4	85.3	79.0	76.6	73.3	79.0	84.7
Crude oil, Brent	\$/bbl	a/	42.3	70.4	99.8	112.7	99.2	88.4	81.4	78.2	74.9	80.1	86.2
Crude oil, Dubai	\$/bbl		42.2	68.8	97.0	108.9	98.3	84.6	79.6	77.9	74.7	80.5	86.6
Crude oil, WTI	\$/bbl		39.3	68.0	94.4	108.7	91.8	82.9	76.1	73.8	70.2	76.4	81.4
Natural gas, Index	2010=100		45.5	130.7	281.6	251.8	396.8	255.9	124.6	89.3	84.3	85.2	93.3
Natural gas, Europe **	\$/mmbtu	a/	3.24	16.12	40.34	31.64	60.16	36.93	16.84	11.33	10.35	9.55	11.19
Natural gas, U.S.	\$/mmbtu	a/	2.01	3.85	6.37	7.45	7.93	5.47	2.65	2.16	2.18	2.55	2.58
Liquefied natural gas, Japan	\$/mmbtu	a/	8.31	10.76	18.43	16.17	21.28	20.67	18.21	13.49	12.68	12.99	12.88

Source: World Bank, 2023

Exchange rates are another import consideration which influence trade values, with a weaker Rand providing some short-term export benefits. The rand weakened overall in 2022, as seen in Chart 8, with further sharp depreciation continuing into 2023. The implied starting point for the rand forecast is R18.68 (2023Q2) to the United States (U.S.) dollar.

Chart 8: South African Rand/U.S. Dollar Exchange Rate, July 2022 – October 2023



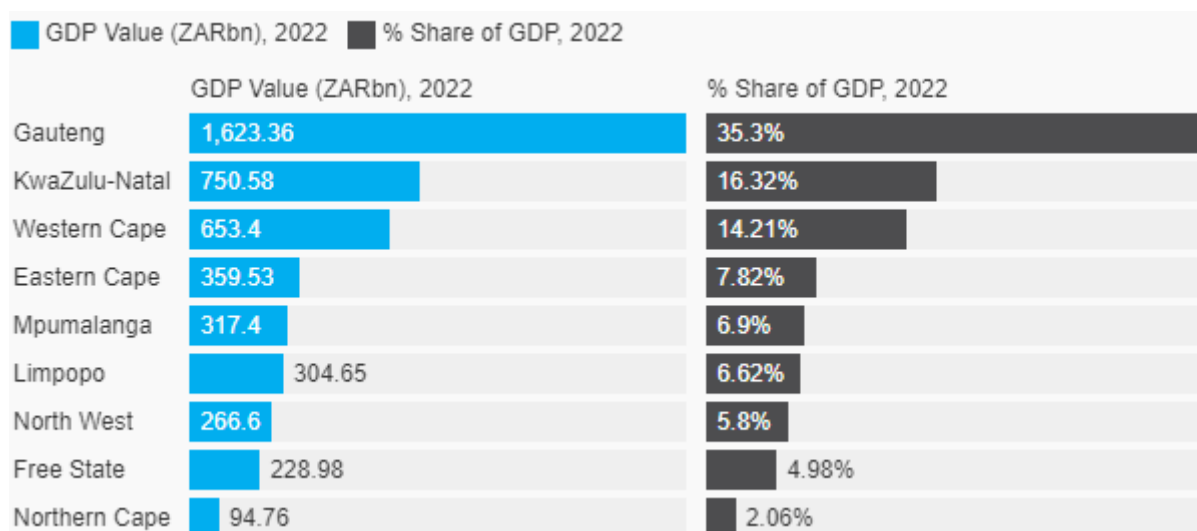
Source: Trading Economics, 2023

4. Provincial and District Trade Flows

4.1 Provincial GDP

The Western Cape has the third largest economy among the nine provinces of South Africa. The province contributed approximately 14.21% (valued at ZAR653.40bn) to South Africa's GDP in 2022. Gauteng (35.30% or ZAR1, 623.36bn) and KwaZulu-Natal (16.32% or ZAR750.58bn) were the top two contributors to national output during this period.

Figure 7: Provincial Contribution to National GDP⁵, 2022

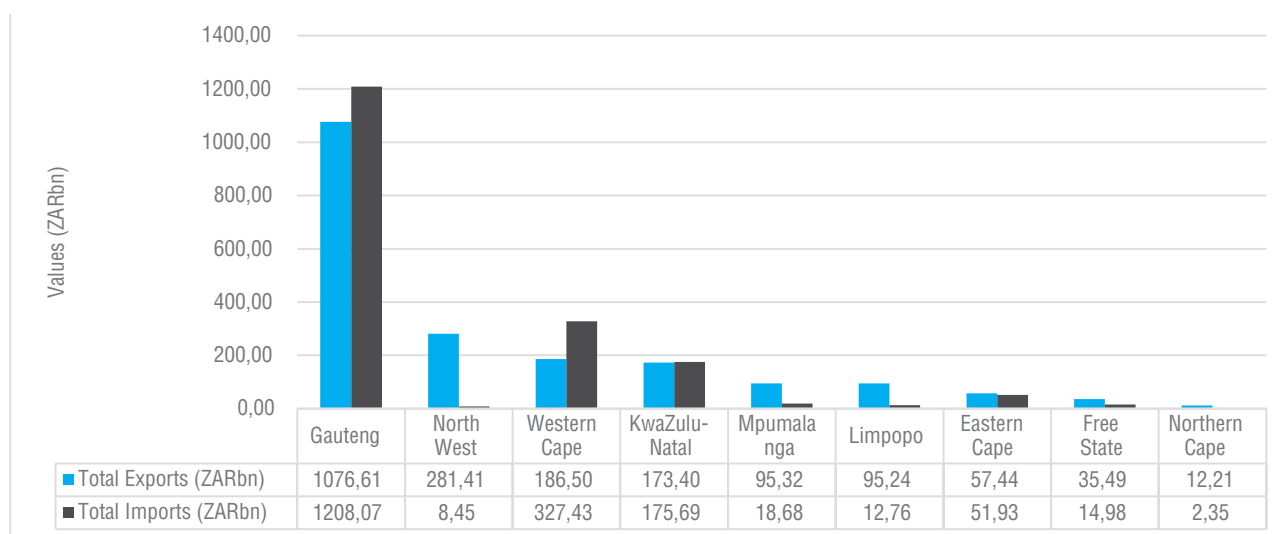


Source: Quantec,2023

4.2 Provincial trade by values

Gauteng was the largest exporter and largest importer (in value terms) out of all nine provinces in 2022. Total bilateral trade for the province amounted to a significant ZAR2.28trn in the said year. The Western Cape followed in second place, with total trade flows amounting to ZAR513.93bn.

Figure 8: Provincial Trade, South Africa, 2022



Source: Quantec,2023

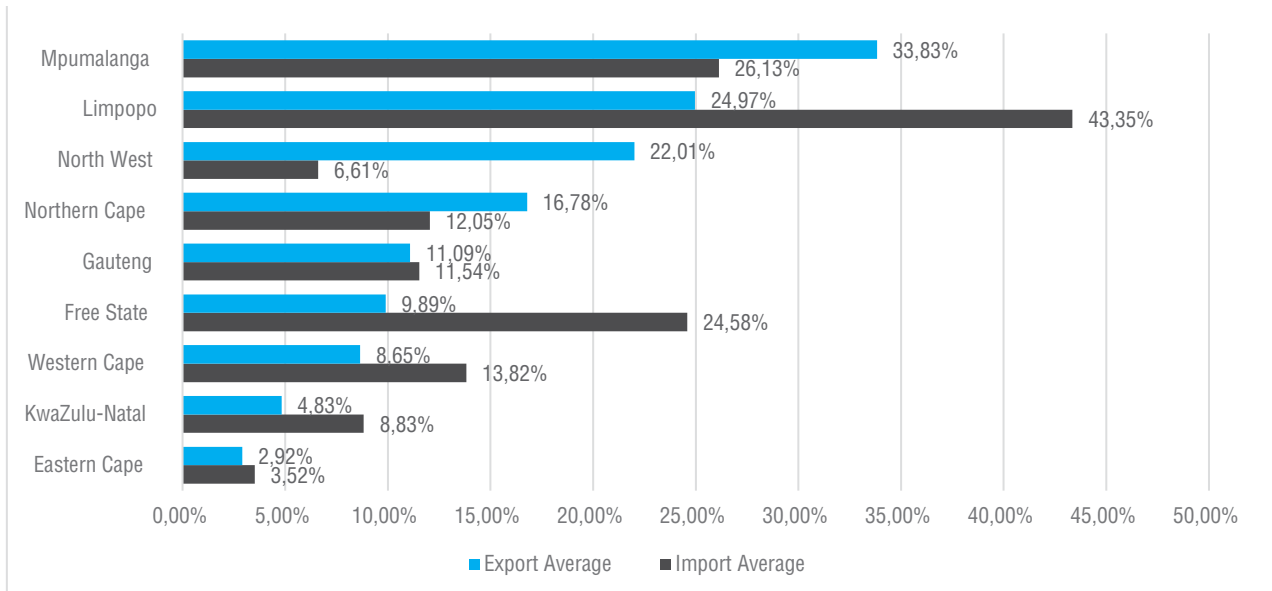
The provinces in South Africa have varying trade account balances, with some provinces being net importers while others are net exporters. Net exporters in 2022 included the North West (ZAR272.96bn), Limpopo (ZAR82.48bn), Mpumalanga (ZAR76.64bn), Free State (ZAR20.50bn), Northern Cape (ZAR9.86bn), and the Eastern Cape (ZAR5.51bn). Net importers in 2022 included the Western Cape (-ZAR140.93bn), Gauteng (-ZAR131.45bn), and KwaZulu-Natal (-ZAR2.30bn).

5 Gross domestic product (GDP) at market prices. ZAR million at constant 2015 prices, seasonally adjusted and annualised

In terms of average growth in annual trade amongst the provinces, Figure 9 shows that Mpumalanga was the leading province in terms of export growth during the period 2018–2022, increasing by an annual average rate of 33.83%. Limpopo followed in second place with an annual growth rate of 24.97%. The Western Cape recorded an average annual growth rate of 8.65% in export earnings over the same period.

Regarding imports, the North West dominated, recording an annual average growth of 43.35% in import costs during the period 2018–2022. Mpumalanga followed with a growth rate of 26.13%, with the Free State in third position at 24.58%. The Western Cape recorded an average annual growth rate of 13.82% in import costs over the same period.

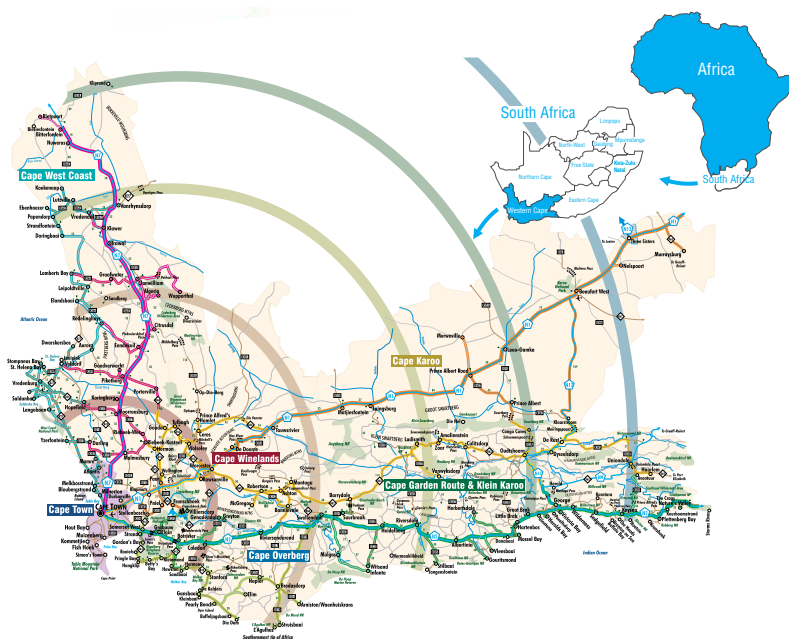
Figure 9: Provincial Trade Growth (% average), 2018–2022



Source: Quantec, 2023

5. Western Cape Trade Flows by District

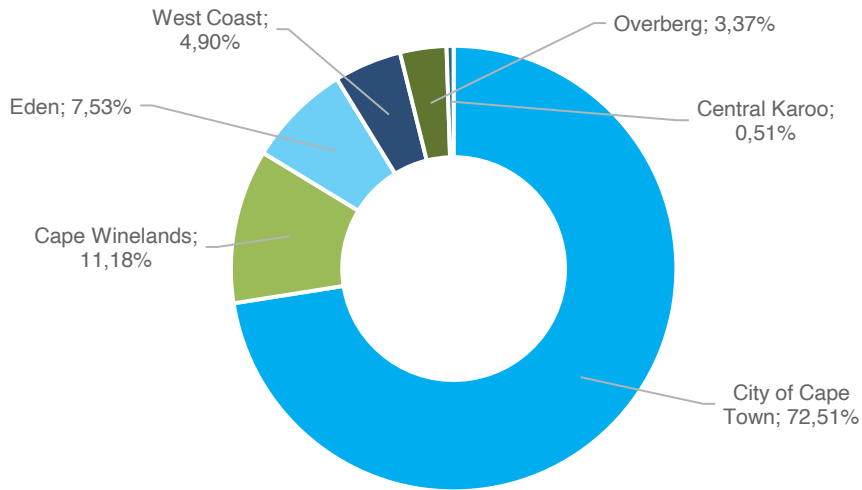
The greater Western Cape provincial coast economy is comprised of one metropolitan municipality – the Cape Metro, often referred to as the City of Cape Town – and five district municipalities. These five districts are the Cape Winelands, Central Karoo, Garden Route, Overberg and the West Coast. Together with the Cape Metro, these collectively represent and account for the Western Cape’s provincial economy.



5.1 District GDP

The City of Cape Town dominated the Western Cape’s economic landscape in 2022, contributing 72.51% (ZAR429.74 bn) to the province’s GDP as measured by gross value added (GVA) in ZAR millions constant 2015 prices. The Cape Winelands district was the second largest economy in the Western Cape in 2022, with GDP valued at R66.26bn and equivalent to a 11.18% share. This was followed by the Garden Route (Eden) district which contributed R44.61bn, representing a share of 7.53%. The West Coast district was the fourth largest economy in the Western Cape Province in 2022, accounting for an estimated 4.90% of the province’s economic output. This information is displayed in Figure 10.

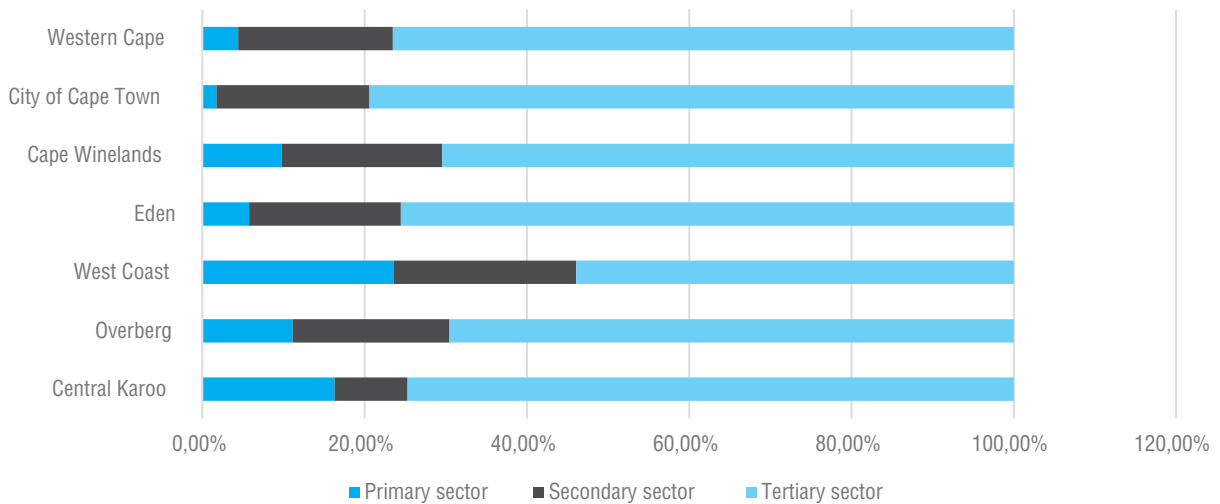
Figure 10: District Contribution to Provincial GDP, 2022 (%)



Source: Quantec,2023
GVA at basic prices; ZAR millions constant 2015 prices

As is evident in Figure 11, the Western Cape economy is dominated by tertiary sector activities (which contributed to 76.51% of GDP in 2022), largely due to the influence of the Cape Metro area.

Figure 11: GDP Contribution by Main Sector, 2022 (%)



Source: Quantec,2023
GVA at basic prices; ZAR millions constant 2015 prices

From the perspective of sectoral contributions, Table 1 affirms the tertiary sector's dominance in the province and provides further insight into the contributions from the various sub-sectors. The notable differences in the sectoral contributions by the various district municipalities is also evident.

Table 1: Sectoral GDP Contribution per District, 2022 (%)							
	Western Cape	City of Cape Town	West Coast	Cape Winelands	Overberg	Eden	Central Karoo
Industry							
Primary sector	4.41%	1.75%	23.57%	9.80%	11.14%	5.78%	16.31%
Agriculture, forestry and fishing	4.24%	1.61%	22.86%	9.68%	11.08%	5.55%	16.28%
Mining and quarrying	0.17%	0.14%	0.71%	0.12%	0.06%	0.22%	0.03%
Secondary sector	19.08%	18.85%	22.50%	19.75%	19.31%	18.67%	8.98%
Manufacturing	13.86%	13.73%	18.34%	14.07%	12.90%	13.01%	2.45%
Electricity, gas and water	1.71%	1.78%	1.19%	1.43%	1.55%	1.83%	3.57%
Construction	3.51%	3.34%	2.97%	4.25%	4.86%	3.83%	2.95%
Tertiary sector	76.51%	79.40%	53.93%	70.45%	69.55%	75.55%	74.71%
Wholesale and retail trade, catering and accommodation	14.25%	13.93%	13.31%	15.70%	16.33%	15.04%	11.78%
Transport, storage and communication	9.33%	9.79%	6.16%	8.02%	9.12%	8.81%	11.80%
Finance, insurance, real estate and business services	31.86%	34.14%	15.14%	26.39%	26.51%	32.55%	13.41%
General government	9.92%	10.18%	9.72%	9.30%	7.94%	8.77%	19.69%
Community, social and personal services	11.14%	11.36%	9.60%	11.04%	9.65%	10.37%	18.03%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

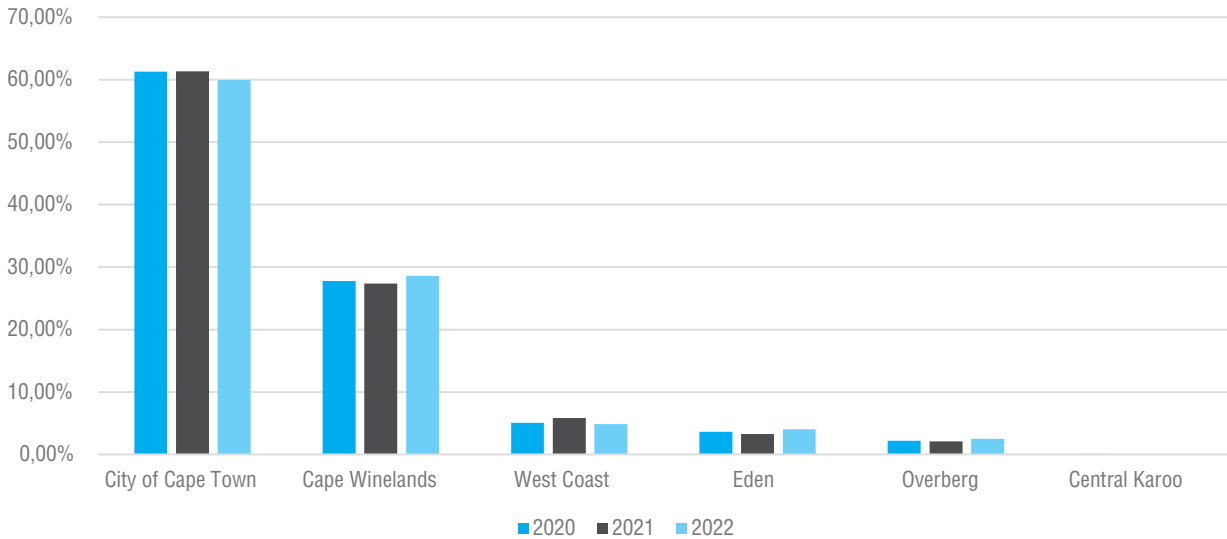
Source: Quantec, 2023
 GVA at basic prices; ZAR millions constant 2015 prices



5.2 District trade by values

From a trade perspective, the City of Cape Town dominates the trade flows in the region's municipalities, as can be observed in Figure 12. To contextualise this, the City of Cape Town exported ZAR111.82bn worth of goods in 2022, equivalent to 59.95% of the province's total export earnings in that year. The Cape Winelands followed in second position, with export earnings totalling ZAR53.35bn, equivalent to 28.61% of the province's total export earnings, while the West Coast placed third at ZAR9.05bn (4.85%) in the same year.

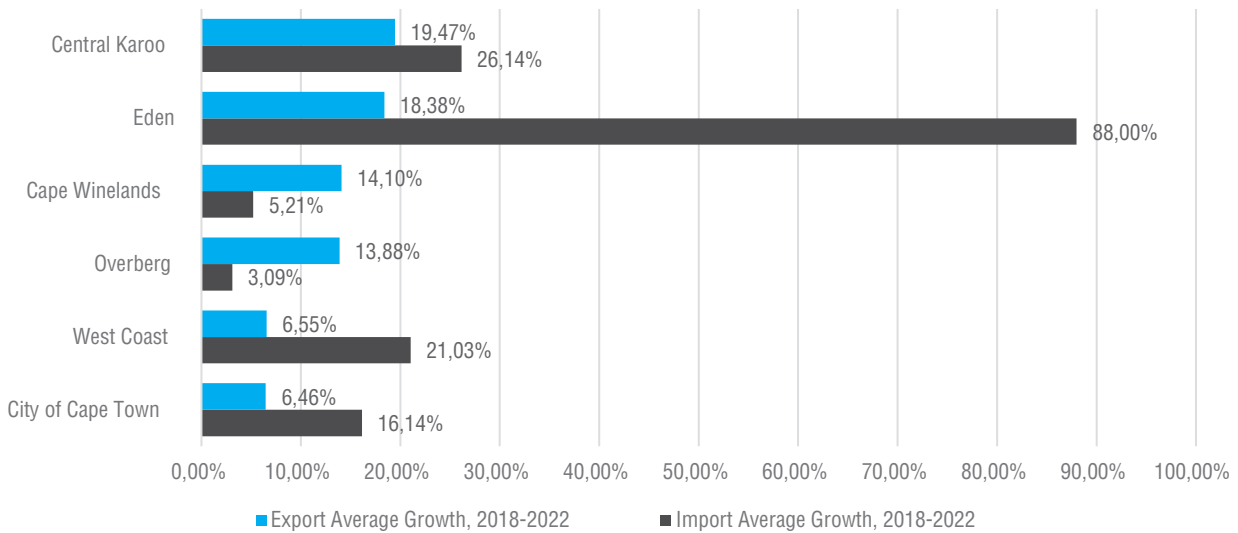
Figure 12: Contributions from Districts (%) to Provincial Exports, 2020–2022



Source: Quantec, 2023

Figure 13 illustrates the average growth rate in trade in the various districts in the Western Cape from 2018 to 2022. It is evident that the Central Karoo is the leading district in terms of export growth, with an average annual growth rate of 19.47% during this period. Although impressive, this is off a very low base, with nominal exports averaging ZAR91.37m throughout the said period, compared to the City of Cape Town's ZAR88.79bn average.

Figure 13: Western Cape Average Trade Growth (%) by District, 2018–2022



Source: Quantec, 2023

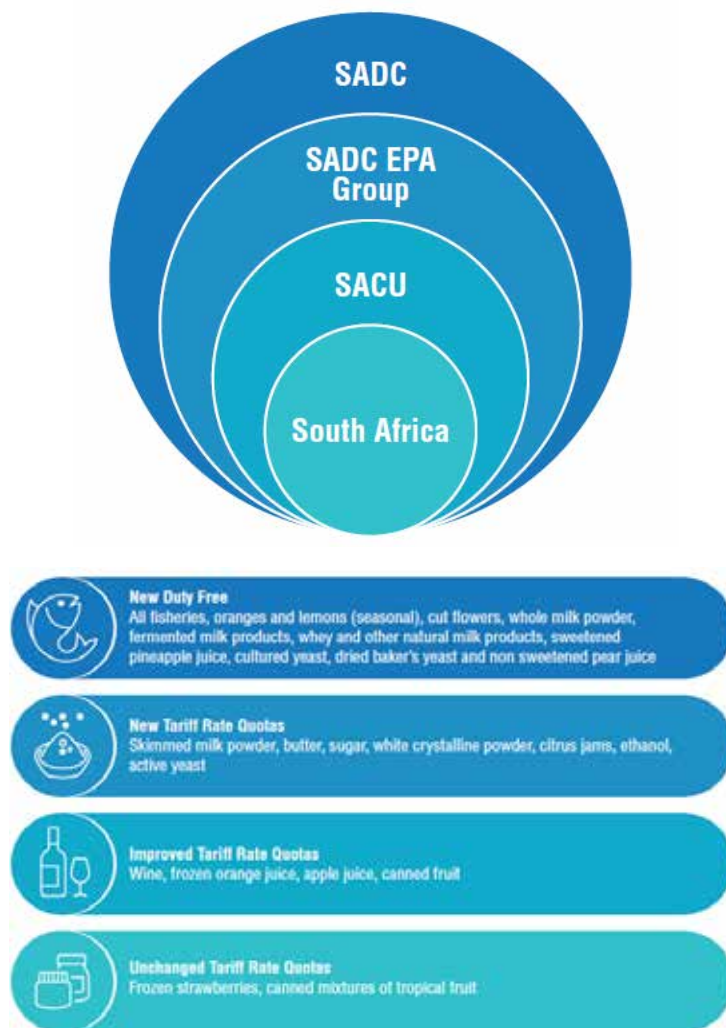
6. Western Cape Source and Destination Markets

6.1 Trade agreements

The Western Cape benefits from preferential trade agreements and arrangements between South Africa and its major trading partners. The region thus has advantageous access to select world markets through preferential trade agreements, such as those between South Africa and other major markets like Europe and the United Kingdom; and with the United States, the **African Growth and Opportunity Act (AGOA)**, which is a law that grants duty-free access for certain products imported from qualifying sub-Saharan Africa (SSA) countries. South Africa is also a member of the Southern Africa Development Community (SADC) and the Southern African Customs Union (SACU) among others. South Africa is seen as a geographic gateway to the rest of the African market and the Western Cape is strategically positioned for African market access.

In 2016, an Economic Partnership Agreement (EPA) was concluded between a group of countries in the SADC and the European Union which replaced the Trade Development and Cooperation Agreement (TDCA). The SADC group of countries involved in this EPA does not consist of the entire SADC bloc, but rather members of SACU plus Mozambique. Angola has applied to be part of the EPA. The SADC-EU EPA is a comprehensive Economic Partnership Agreement between the EU and South Africa, Botswana, Lesotho, Namibia, Eswatini, and Mozambique.

The EPA provides preferential access to the EU market for 98.7% of South African goods (96.2% are fully duty free and 2.5% are partially duty free). Goods that are partially duty free are subject to Tariff Rate Quotas (TRQs). Moreover, the EPA has a strong focus on regional integration and fostering regional value chains in the SADC-EPA group of countries. While the SADC-EU EPA is a reciprocal trade agreement, meaning both the EU and the SADC-EPA group offer preferential market access to each other, the EU provides greater preferential and duty-free access, and the SADC-EPA group are allowed to maintain protection of sensitive sectors.



Source: Wesgro & TRALAC, 2018⁶ Southern African Development Community European Union Economic Partnership Agreement.

The terms of the EU EPA have been replicated under a new and separate EPA with the United Kingdom, which came into force on 1 January 2021. This has allowed for the continuation of preferential trade between South Africa and the United Kingdom after Brexit. This is the EPA, UK-SACUM⁷ which is an EPA between the SACU member states and Mozambique, and the United Kingdom of Great Britain and Northern Ireland.

The South African Revenues Services (SARS) provides detailed information on South African international treaties and agreements; see here: <https://www.sars.gov.za/legal-counsel/international-treaties-agreements/>

AGOA

The African Growth and Opportunity Act (AGOA) has been extremely topical in 2023 due, on the one hand to the imminent expiration of the programme, and on the other hand, to South Africa's eligibility being called into question by American lawmakers.

AGOA is not a trade agreement. Rather, it is a United States (U.S.) law which establishes a unilateral trade preference programme, which grants duty-free access for certain products imported from qualifying sub-Saharan Africa (SSA) countries. Signed into law by former U.S. President Clinton in 2000, it was initially set to run for eight years, but has seen numerous extensions and amendments since. The latest was in 2015 when, then President Obama extended AGOA until 2025 through the AGOA Extension and Enhancement Act of 2015.⁸ Amongst other things, AGOA aims to promote increased trade, investment, economic development as well as enhanced access and opportunities between the U.S. and SSA countries.

AGOA builds upon the U.S. Generalized System of Preferences (GSP) and cannot be understood in isolation of GSP. To be eligible for AGOA, a country needs to be eligible for GSP. The U.S. GSP trade preference programme dates back to 1974, designed to “promote economic growth in the developing world” by providing preferential duty-free access for approximately 3500 products from “beneficiary developing countries” (BDC) around the world. Whilst the vast majority of GSP products are also eligible for duty-free access under AGOA, AGOA goes further, building upon this through offering those GSP beneficiary countries that are located in SSA additional duty-free access for up to about 1,700 dutiable products. AGOA also provides South Africa with access to many products that would otherwise only be available to “Least Developed Beneficiary Developing Countries” (LDBDC) under GSP. Approximately 30 percent of GSP products are reserved for LDBDCs, which excludes South Africa.⁹ AGOA also provides expanded access by eliminating certain quantitative limits on GSP benefits. Another benefit of AGOA is that GSP expiration does not affect AGOA beneficiaries.¹⁰

GSP is not unique to the U.S. Rather, it is a system established under the World Trade Organisation (WTO) which allows developed countries to offer non-reciprocal preferential treatment to products originating in developing countries. Developed countries that give such preferences can unilaterally determine which countries and which products are included in their schemes.

Both GSP and AGOA set out eligibility criteria. AGOA requires the U.S. President to monitor and determine, annually, whether a country meets these eligibility requirements.¹¹ The process includes an annual public comment period and hearing, and as amended by the 2015 reauthorization, allows for out-of-cycle reviews in response to public petitions.

GSP eligibility criteria cover a range of issues, including worker rights, arbitral awards, and intellectual property rights. Additionally, GSP entails an income limit requiring a beneficiary developing country to “graduate” from the programme if it becomes a high-income country.

AGOA eligibility criteria requires that a country has established or is making continual progress toward establishing, among other things: a market-based economy; the rule of law; political pluralism; the right to due process; the elimination of barriers to U.S. trade and investment; economic policies to reduce poverty; a system to combat corruption and bribery; and protection of internationally recognised worker rights. The eligibility criteria also require beneficiary countries not to engage in activities that undermine U.S. national security or foreign policy interests or engage in gross violations of internationally recognised human rights.

AGOA has been topical this year for two reasons. In the first instance, because the AGOA programme is set to expire in 2025, and lobbying is underway for its extension. The second instance has reference to the annual eligibility review, where South Africa's eligibility was brought into question due to perceived alignment with Russia in the Russia-Ukraine conflict, despite South Africa's stated position of non-alignment.

Regarding AGOA's imminent expiration: there appears to be a reasonable chance of renewal, the question is what this would look like. For example, the programme could be renewed without much change, which could mean an easy passage through Congress, or largescale changes could be introduced, which may broaden the scope of AGOA or enhance its effectiveness, but this may make it more difficult to get the renewal passed. Many are calling for an early renewal, as the uncertainty has a chilling effect on AGOA-related investment.

The AfCFTA and the green transition and critical minerals will no doubt become increasingly topical in the AGOA debate.

7 <https://findrulesoforigin.org/en/home/agreement-detail?fta=976>

8 United States International Trade Commission (USITC). African Growth and Opportunity Act (AGOA): Programme Usage, Trends, and Sectoral Highlights. March 2023.

9 USITC. AGOA Programme Usage, Trends, and Sectoral Highlights. March 2023.

10 USTR. GSP Expiration: Frequently Asked Questions. January 2021.

11 USITC AGOA: Programme Usage, Trends, and Sectoral Highlights. March 2023.

Regarding South Africa's eligibility: the 2024 Annual Review is still underway.

The Western Cape benefits significantly from AGOA, and loss of the duty-free benefits offered by the programme would have a substantial impact on the competitiveness of AGOA eligible Western Cape exports to the U.S.

South Africa's exports have significantly benefited from AGOA/GSP preferences, with an average annual share of 31% of SA exports to the U.S. trading under the programme since inception until 2021. Although SA's exports to the U.S. which traded under AGOA were relatively low in 2021 (16%), it is highly important at a sector level in certain sectors.

For example, 70% of South Africa's agricultural products to the U.S. relied on AGOA, while 50% of footwear; 49% of miscellaneous manufactures and 36% of forest product exports benefited from the programme. If South Africa loses access to AGOA benefits the impacts will therefore be most direct on existing exporters in specific sectors. These include some of the Western Cape's largest exports, including citrus, wine, yachts, manufactured goods and more.

South Africa is competing with Mexico, Chile, Peru and Morocco in the U.S. when it comes to citrus. These countries all have free trade agreements with the U.S. and most of them are closer to market. In instances like this, AGOA plays a critical role in the success of an industry.

AGOA is also an important driver of Foreign Direct Investment (FDI) into sub-Saharan Africa, including the Western Cape. By providing duty free access to the U.S., it makes the investment proposition of the region more lucrative.

The cumulation allowances under AGOA, which allow AGOA beneficiary countries to source inputs from other beneficiary countries presents significant opportunities for the establishment of regional value chains. While this was always advantageous under the existing regional economic communities, e.g., SADC, it is only really now, with the imminent implementation of the AfCFTA, that this significant advantage would really be able to fully come to fruition as east, west and southern Africa liberalise trade on 90 percent of goods. Tariffs between these regions are often prohibitively high.

It is also a crucial moment in the rearrangement of global supply chains. Geopolitics and the green transition are driving major changes in investor behaviour, with many looking to Africa as a new destination for investment. South Africa plays a key role in intra-Africa trade and investment, as well as in linking Sub-Saharan Africa to global markets. Excluding South Africa from AGOA at this crucial moment would set back much of the momentum of the past two decades and leave a gap in the link between African Continental integration and the U.S.

Update on the African Continental Free Trade Area (AfCFTA)¹² agreement

The AfCFTA agreement aims to establish a free trade area spanning the 55 Member States of the African Union (AU). The agreement includes undertakings by member states to progressively eliminate tariffs and non-tariff barriers; to liberalise trade in services; to cooperate on investment, intellectual property rights, competition policy, customs matters; and to establish a dispute settlement system. The agreement entered into force on 30 May 2019 for the 24 countries that had deposited their instruments of ratification by this date.

The operational phase of the AfCFTA agreement was launched during the 12th Extraordinary Session of the Assembly of the Union on the AfCFTA in Niamey, Niger on 7 July 2019. Start of trading under the AfCFTA agreement began on 1 January 2021. However, no trade has as yet taken place under the AfCFTA agreement, as key schedules on tariff concessions and rules of origin are still under negotiation. On 7 October 2022, the AfCFTA Secretariat launched the AfCFTA Guided Trade Initiative in Accra to allow for commercially meaningful trade under the agreement to commence for eight participating countries: Cameroon, Egypt, Ghana, Kenya, Mauritius, Rwanda, Tanzania and Tunisia, representing the five regions of Africa. This initiative is being used to pilot the operational, institutional, legal and trade policy environment under the AfCFTA agreement.

As at August 2023, 47 of the 54 signatories (87%) had deposited their instruments of AfCFTA ratification (ordered by date): Ghana, Kenya, Rwanda, Niger, Chad, Eswatini, Guinea, Côte d'Ivoire, Mali, Namibia, South Africa, Congo, Rep., Djibouti, Mauritania, Uganda, Senegal, Togo, Egypt, Ethiopia, Gambia, Sahrawi Arab Democratic Rep., Sierra Leone, Zimbabwe, Burkina Faso, São Tomé & Príncipe, Equatorial Guinea, Gabon, Mauritius, Central African Rep., Angola, Lesotho, Tunisia, Cameroon, Nigeria, Malawi, Zambia, Algeria, Burundi, Seychelles, Tanzania, Cabo Verde, Democratic Republic of the Congo, Morocco, Guinea-Bissau, Botswana, Comoros and Mozambique.

In the short term, the greatest impact for Western Cape exporters will be the opening of markets beyond the South African Development Community (SADC). Under the AfCFTA agreement, one will see for the first-time liberalisation between South Africa and markets in east, west, and north Africa. While this will bring exciting new opportunities, it will be of equal importance that adequate trade facilitation measures are implemented to increase efficiencies and reduce the costs of transport and logistics.

During 2023, the AfCFTA Guided Trade is to also focus on trade in services.¹³ This would focus on five priority areas being business services, communication services, tourism, transport, and financial services. This is of particular interest for companies involved in services in the Western Cape who are looking to expand their market reach into the rest of Africa. This as the province is positioned as a significant trade and conventions destination on the continent.¹⁴

12 <https://www.tralac.org/resources/infographics/13795-status-of-afcfta-ratification.html>

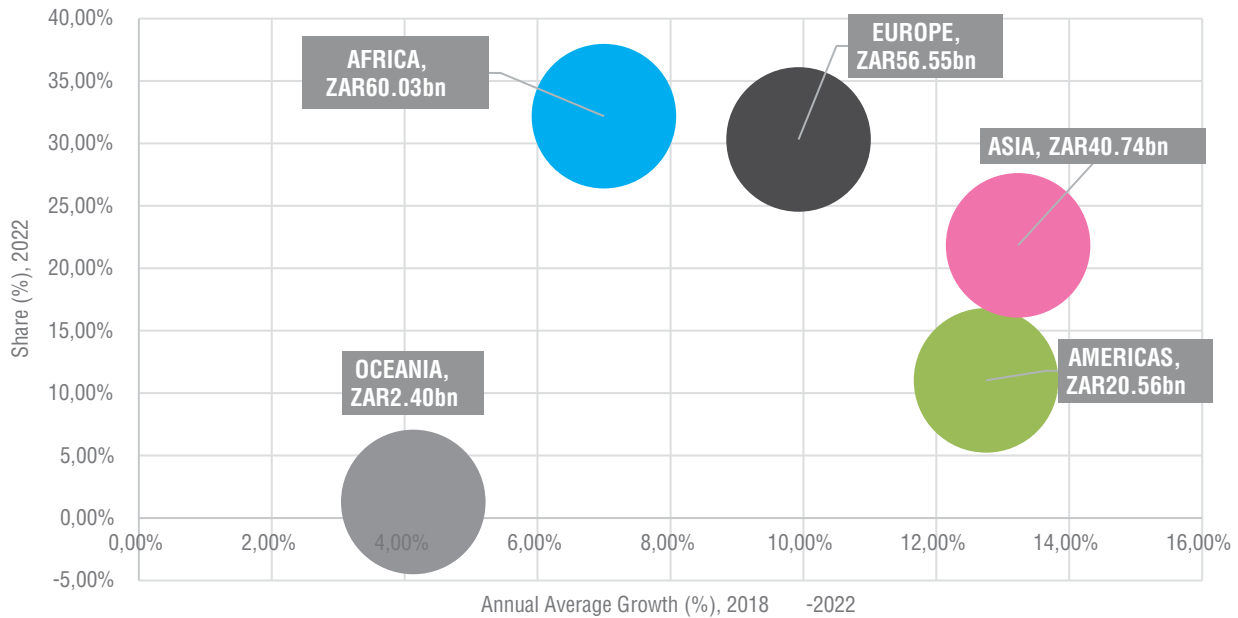
13 <https://www.un.org/africarenewal/magazine/february-2023/au-summit-2023-powering-trade-through-afcfta>

14 <https://www.tourismupdate.co.za/article/stable-and-sustainable-energy-key-unlocking-afcfta>

6.2 Western Cape trade by world regions

From a regional trading perspective, Figure 14 demonstrates that Africa was the leading regional export destination for the province's exports in 2022 with local exports to the African continent worth an estimated ZAR60.03bn. This was equivalent to 32.19% of the province's total exports in 2022. Europe was the second largest export destination region, with the Western Cape exporting goods to the value of ZAR56.66bn (30.32% of total exports) to this region in 2022. Asia was in third position, with local goods to the value of ZAR40.74bn (21.84%) exported to the Asian continent in 2022. Asia was also the province's fastest growing export region during the period 2018–2022, as depicted by the pink bubble in Figure 14.

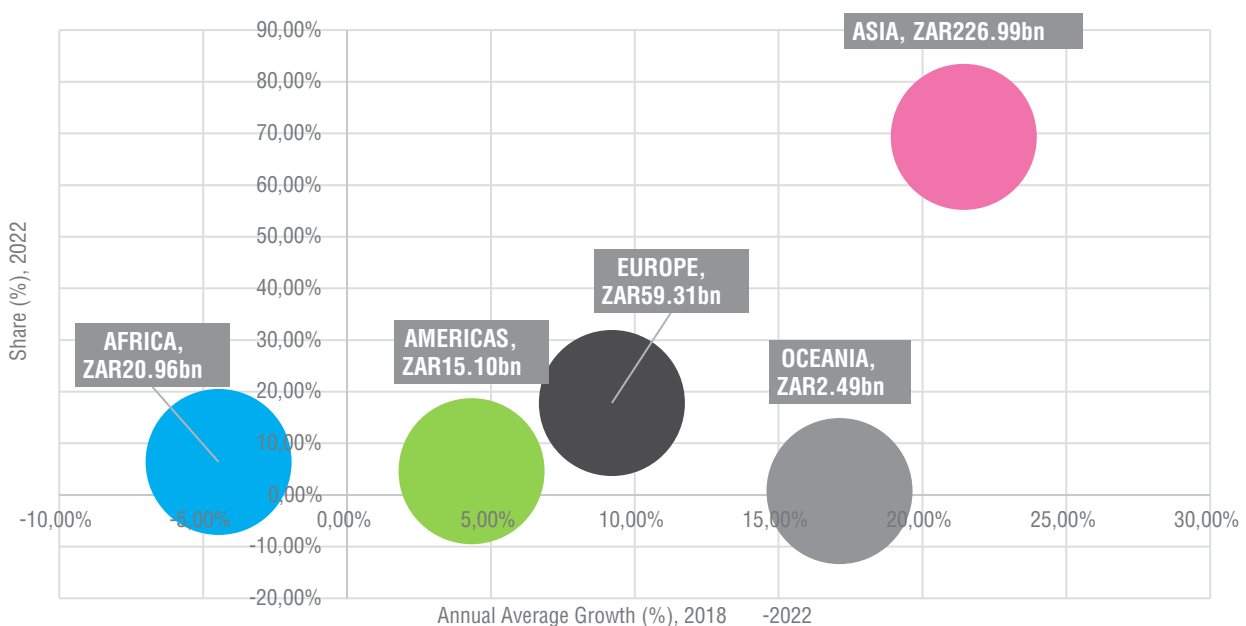
Figure 14: Western Cape Global Regional Exports, 2022



Source: Quantec, 2023

Turning to key import source markets, Asia was the largest source region for the province's imports in 2022, as is evident in Figure 15. At an estimated cost of ZAR226.99bn, this was equivalent to 69.32% of the province's total import costs incurred in 2022. Europe was the second largest import source region with import costs of ZAR59.31bn (17.81% of total import costs), while Africa was in third place with costs of ZAR20.96bn (6.40%). Asia was also the fastest growing import source region for the province during this period, as depicted by the pink bubble in Figure 15.

Figure 15: Western Cape Global Regional Imports, 2022



Source: Quantec, 2023

6.3 Western Cape trade by countries

The top 20 export destination markets for the Western Cape in 2022 are shown in Table 2.

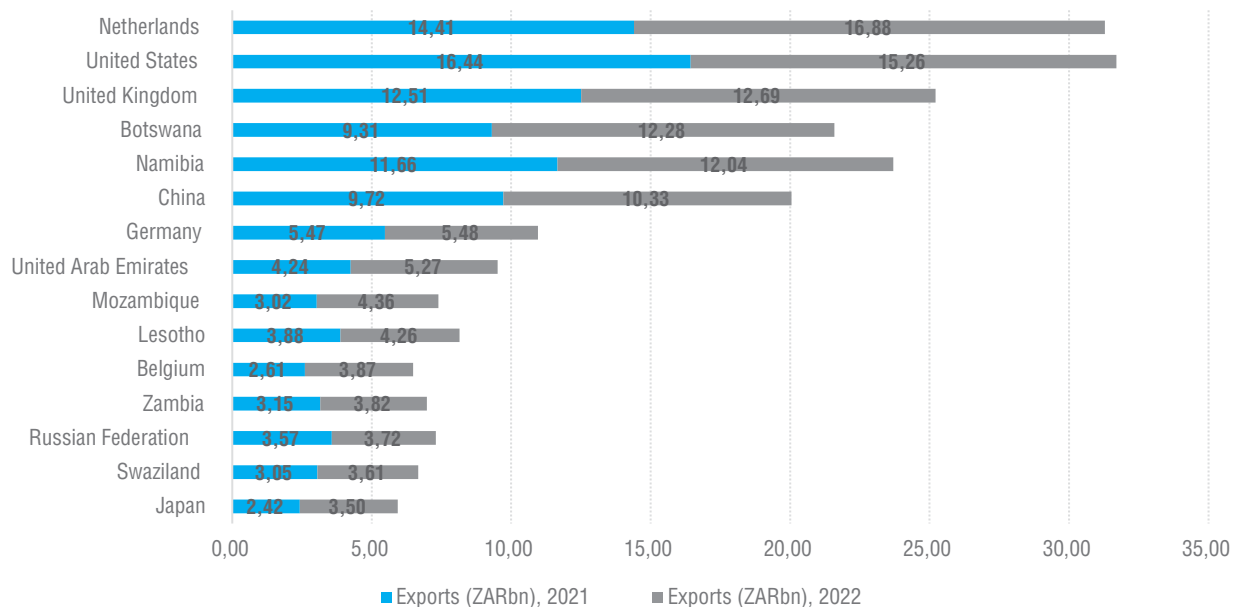
The top three export destinations for the Western Cape in 2022 were the Netherlands (ZAR16.88bn), the U.S. (ZAR15.26bn) and the United Kingdom (ZAR12.69bn), with these three export destination markets accounting for a combined 24.08% of total exports earnings in the said year. The fastest growing export markets – within the top 20 export destinations grouping – during the period 2018–2022 were Mauritius, with an average growth rate of 50.87%, followed by India (48.65%), Belgium (25.30%), and China (21.25%).

Table 2: Top 20 Export Markets, Western Cape, 2022					
Rank	Country	Value (ZARbn), 2022	% Share, 2022	Growth (%), 2021-2022	Ave Growth (%), 2018-2022
1	Netherlands	16.88	9.06%	17.15%	14.58%
2	United States	15.26	8.20%	-7.13%	14.00%
3	United Kingdom	12.69	6.82%	1.45%	7.99%
4	Botswana	12.28	6.59%	31.93%	13.60%
5	Namibia	12.04	6.47%	3.32%	1.54%
6	China	10.33	5.55%	6.28%	21.25%
7	Germany	5.48	2.94%	0.13%	2.81%
8	United Arab Emirates	5.27	2.83%	24.28%	16.99%
9	Mozambique	4.36	2.34%	44.30%	19.39%
10	Lesotho	4.26	2.29%	9.87%	11.37%
11	Belgium	3.87	2.08%	48.62%	25.30%
12	Zambia	3.82	2.05%	21.31%	7.43%
13	Russian Federation	3.72	2.00%	4.12%	13.96%
14	Swaziland	3.61	1.94%	18.32%	8.35%
15	Japan	3.50	1.88%	44.65%	13.97%
16	Zimbabwe	3.50	1.88%	35.97%	19.42%
17	Mauritius	3.42	1.84%	263.14%	50.87%
18	Canada	2.96	1.59%	16.07%	15.48%
19	India	2.94	1.58%	-29.65%	48.65%
20	Spain	2.89	1.55%	-3.18%	16.53%
	Total Exports	186.23	100.00%	12.88%	8.61%

Source: Quantec, 2023

Figure 16 gives a graphic representation of the Western Cape's top 15 export markets (as measured by export value in rands) for 2021 export values, compared to those earned in 2022.

Figure 16: Top 15 Export Destination, 2021 vs 2022, ZARbn



Source: Quantec, 2023

The top five export products (HS6 level) and the respective export value for each of the top five export markets in 2022 are tabled below in Table 3:

Table 3: Top 5 Export Products to Top Five Export Markets, Western Cape, 2022		
Rank	Netherlands	Value (ZARm), 2022
1	HST270119: -- Other coal	1993.29
2	HST080510: - Oranges	1397.09
3	HST080521: -- Mandarins (including tangerines and satsumas) (2017-)	1149.92
4	HST080940: - Plums and sloes	924.18
5	HST080550: - Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia) (2002-)	681.61
Rank	United States	Value (ZARm), 2022
1	HST711319: -- Articles of jewellery - of other precious metal, whether or not plated or clad with precious metal	2508.46
2	HST080521: -- Mandarins (including tangerines and satsumas) (2017-)	829.82
3	HST080510: - Oranges	829.06
4	HST251320: - Emery, natural corundum, natural garnet and other natural abrasives (1996-)	447.69
5	HST852910: - Aerials and aerial reflectors of all kinds; parts suitable for use therewith	395.32
Rank	United Kingdom	Value (ZARm), 2022
1	HST080810: - Apples	1112.86
2	HST080521: -- Mandarins (including tangerines and satsumas) (2017-)	972.19
3	HST080510: - Oranges	444.16
4	HST080930: - Peaches, including nectarines	380.88
5	HST081040: - Cranberries, bilberries and other fruit of the genus Vaccinium	360.62
Rank	Botswana	Value (ZARm), 2022
1	HST271012: -- Light oils and preparations (2012-)	5852.38
2	HST220600: Other fermented beverages (for example, cider, perry, mead, saké); mixtures of fermented beverages and mixtures of fermented beverages and non-alcoholic beverages, not elsewhere specified or included	544.14
3	HST100630: - Semi-milled or wholly milled rice, whether or not polished or glazed	429.82
4	HST200990: - Mixtures of juices	168.50
5	HST240220: - Cigarettes containing tobacco	155.56
Rank	Namibia	Value (ZARm), 2022
1	HST240220: - Cigarettes containing tobacco	304.10
2	HST271012: -- Light oils and preparations (2012-)	254.74
3	HST271113: -- Butanes	164.66
4	HST961900: Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles, of any material (2012-)	161.54
5	HST220820: - Spirits obtained by distilling grape wine or grape marc	154.72

Source: Quantec, 2023

Regarding imports, the top 20 import source markets for the Western Cape in 2022 are listed in Table 4. The top source market for the province's imports in 2022 was China, with the province importing goods to the value of ZAR51.95bn, equivalent to 15.87% of the province's total imports, from this country. The United Arab Emirates placed second, with goods to the value of ZAR37.28bn (11.39%) imported from this Emirate. India followed in third position, accounting for imports to the value of ZAR36.61bn (11.18%) in 2022. Collectively these three countries accounted for 38.43% of the province's total imports in 2022.

The fastest growing import source markets in the period 2018 to 2022 – within the top 20 import sources – included Oman at an average growth rate of 139.70%, followed by Turkey (91.62%), the Russian Federation (90.37%), United Arab Emirates (81.38%), and Bahrain (75.68%).

Table 4: Top 20 Import Markets, Western Cape, 2022					
Rank	Country	Value (ZARbn), 2022	% Share, 2022	Growth (%), 2021-2022	Ave Growth (%), 2018-2022
1	China	51.95	15.87%	4.42%	12.05%
2	United Arab Emirates	37.28	11.39%	187.33%	81.38%
3	India	36.61	11.18%	115.04%	33.53%
4	Saudi Arabia	23.84	7.28%	63.01%	7.75%
5	Oman	20.75	6.34%	5.95%	139.70%
6	Turkey	11.19	3.42%	149.32%	91.62%
7	Italy	9.67	2.95%	-15.24%	21.29%
8	Malaysia	8.65	2.64%	108.86%	39.42%
9	Germany	8.13	2.48%	23.10%	6.46%
10	United States	8.07	2.46%	10.78%	5.14%
11	Singapore	6.54	2.00%	197.68%	39.34%
12	Belgium	6.52	1.99%	58.27%	32.53%
13	Thailand	6.05	1.85%	15.03%	14.38%
14	Bahrain	4.92	1.50%	157.59%	75.68%
15	Netherlands	4.71	1.44%	-32.61%	12.24%
16	United Kingdom	4.53	1.38%	-7.46%	-3.97%
17	Russian Federation	3.81	1.16%	129.17%	90.37%
18	France	3.19	0.98%	14.44%	5.40%
19	Brazil	3.14	0.96%	47.68%	6.20%
20	Nigeria	3.11	0.95%	38.55%	16.39%
	Total Imports, Western Cape	327.41	100.00%	40.41%	13.82%

Source: Quantec, 2023

Countries which were both top 20 import source markets and export destinations for the Western Cape in 2022 are represented below. This included the Netherlands, the U.S., the United Kingdom, China, Germany, the United Arab Emirates, Belgium, the Russian Federation, and India, as highlighted in the Table 5:

Table 5: Top 20 Markets for the Western Cape's Exports and Imports, 2022							
Top 20 Export Markets, Western Cape, 2022				Top 20 Import Markets, Western Cape, 2022			
Rank	Country	Value (ZARbn), 2022	% Share, 2022	Rank	Country	Value (ZARbn), 2022	% Share, 2022
1	Netherlands	16.88	9.06%	1	China	51.95	15.87%
2	United States	15.26	8.20%	2	United Arab Emirates	37.28	11.39%
3	United Kingdom	12.69	6.82%	3	India	36.61	11.18%
4	Botswana	12.28	6.59%	4	Saudi Arabia	23.84	7.28%
5	Namibia	12.04	6.47%	5	Oman	20.75	6.34%
6	China	10.33	5.55%	6	Turkey	11.19	3.42%
7	Germany	5.48	2.94%	7	Italy	9.67	2.95%
8	United Arab Emirates	5.27	2.83%	8	Malaysia	8.65	2.64%
9	Mozambique	4.36	2.34%	9	Germany	8.13	2.48%

Table 5: Top 20 Markets for the Western Cape's Exports and Imports, 2022

Table 5: Top 20 Markets for the Western Cape's Exports and Imports, 2022							
Top 20 Export Markets, Western Cape, 2022				Top 20 Import Markets, Western Cape, 2022			
Rank	Country	Value (ZARbn), 2022	% Share, 2022	Rank	Country	Value (ZARbn), 2022	% Share, 2022
10	Lesotho	4.26	2.29%	10	United States	8.07	2.46%
11	Belgium	3.87	2.08%	11	Singapore	6.54	2.00%
12	Zambia	3.82	2.05%	12	Belgium	6.52	1.99%
13	Russian Federation	3.72	2.00%	13	Thailand	6.05	1.85%
14	eSwatini	3.61	1.94%	14	Bahrain	4.92	1.50%
15	Japan	3.5	1.88%	15	Netherlands	4.71	1.44%
16	Zimbabwe	3.5	1.88%	16	United Kingdom	4.53	1.38%
17	Mauritius	3.42	1.84%	17	Russian Federation	3.81	1.16%
18	Canada	2.96	1.59%	18	France	3.19	0.98%
19	India	2.94	1.58%	19	Brazil	3.14	0.96%
20	Spain	2.89	1.55%	20	Nigeria	3.11	0.95%
	Total Exports	186.23	100.00%		TOTAL IMPORTS	327.41	100.00%

Source: Quantec, 2023

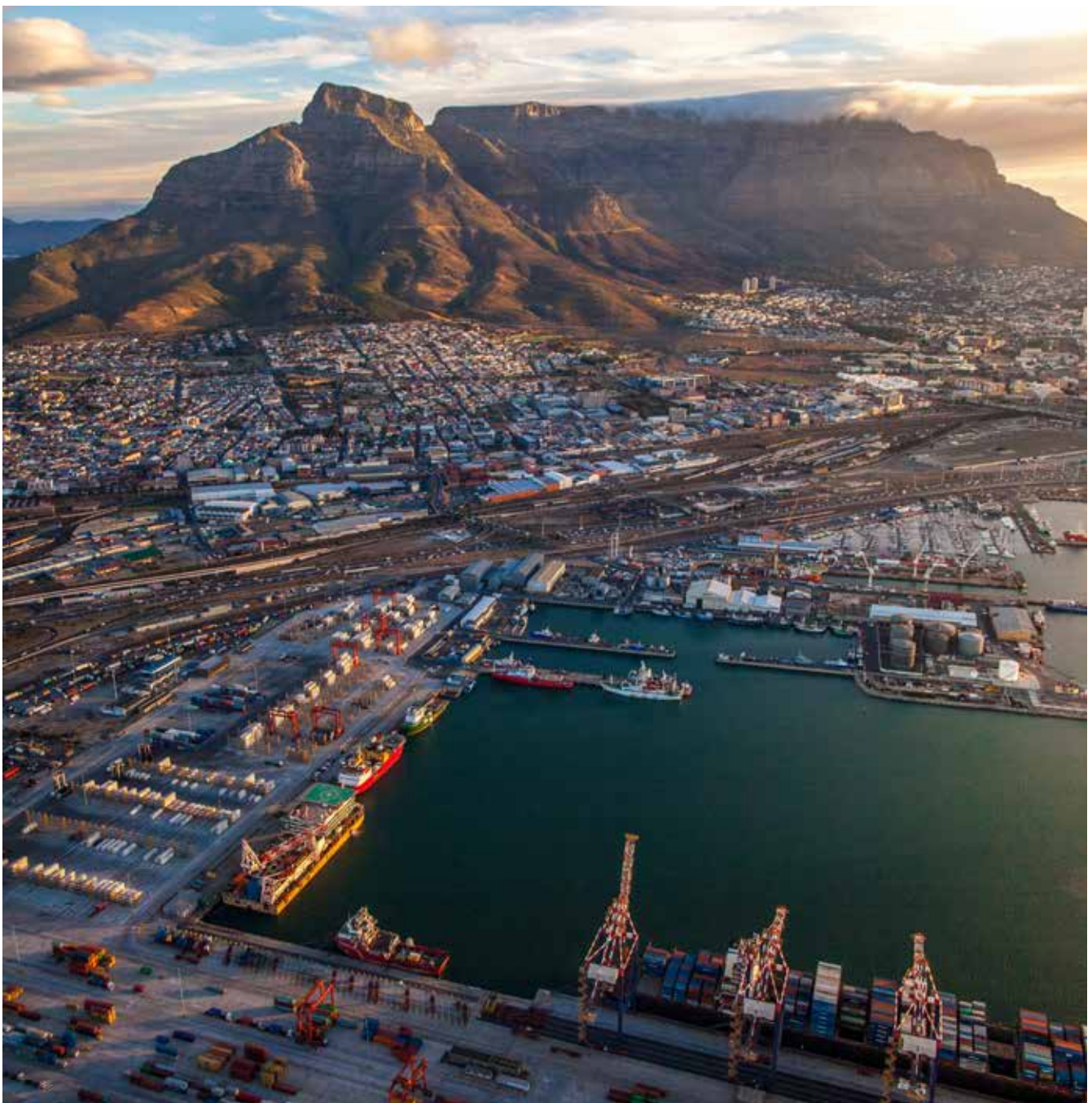
The top five import products (HS6 level) and the respective import value from each of the top five import source markets in 2022 are listed in Table 6. Petroleum oils and related products dominate imports, and these are sourced predominantly from Asian countries.

Table 6: Top Five Import Products from Top 5 Import Markets, WC, 2022

Rank	China	Value (ZARm), 2022
1	HST271012: -- Light oils and preparations (2012-)	2015.28
2	HST850760: - Lithium-ion (2012-)	1450.61
3	HST950300: Tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages; dolls; other toys; reduced-size ('scale') models and similar recreational models, working or not; puzzles of all kinds (2007-)	977.93
4	HST050400: Guts, bladders and stomachs of animals (other than fish), whole and pieces thereof, fresh, chilled, frozen, salted, in brine, dried or smoked	786.67
5	HST851762: -- Machines for the reception, conversion and transmission or regeneration of voice, images or other data, including switching and routing apparatus (2007-)	583.63
Rank	United Arab Emirates	Value (ZARm), 2022
1	HST271012: -- Light oils and preparations (2012-)	36946.35
2	HST190531: -- Sweet biscuits (2002-)	35.81
3	HST390120: - Polyethylene having a specific gravity of 0,94 or more	17.47
4	HST840820: - Engines of a kind used for the propulsion of vehicles of Chapter 87	13.08
5	HST840734: -- Of a cylinder capacity exceeding 1000 cm ³	11.90
Rank	India	Value (ZARm), 2022
1	HST271012: -- Light oils and preparations (2012-)	30982.88
2	HST030617: -- Other shrimps and prawns (2012-)	203.42
3	HST401170: - Of a kind used on agricultural or forestry vehicles and machines (2017-)	135.47
4	HST100630: - Semi-milled or wholly milled rice, whether or not polished or glazed	134.48
5	HST190531: -- Sweet biscuits (2002-)	122.53

Rank	Saudi Arabia	Value (ZARm), 2022
1	HST271012: -- Light oils and preparations (2012-)	22178.41
2	HST381700: Mixed alkylbenzenes and mixed alkyl naphthalenes, other than those of heading 2707 or 2902 (2002-)	902.59
3	HST290250: - Styrene	128.50
4	HST390210: - Polypropylene	125.53
5	HST291614: -- Esters of methacrylic acid	67.82
Rank	Oman	Value (ZARm), 2022
1	HST271012: -- Light oils and preparations (2012-)	20257.49
2	HST310210: - Urea, whether or not in aqueous solution	458.78
3	HST252010: - Gypsum; anhydrite	14.92
4	HST392062: -- Of poly(ethylene terephthalate)	9.32
5	HST330300: Perfumes and toilet waters	1.73

Source: Quantec, 2023



7. Western Cape Trade Products

7.1 Top exported products

When looking at exports from the perspective of products or groupings, (HS2), the edible fruit and nuts category dominated the province's export earnings in 2022, which at a value of ZAR48.80bn, was equivalent to 26.20% of the province's total export earnings accrued in the said year. Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes placed second at a value of ZAR22.55bn (12.11%), while beverages, spirits and vinegar were third at a total value of ZAR14.02bn (7.53% of exports).

When looking at the percentage contribution of the Western Cape's top 15 export products at the HS2 level to South Africa's total export earnings for these respective products, it is evident that the Western Cape dominated various export categories in 2022. These included the fish, crustaceans and molluscs category at 87.18%; edible fruit and nuts (67.27%); beverages, spirits and vinegar (59.81%); preparations of vegetables, fruit, nuts or other parts of plants (59.08%); and works of art, collectors' pieces and antiques (44.31%). This is reflected in the fifth column in Table 7 below.

Table 7: Top 15 Export Products (HS2) from the Western Cape, 2022				
Rank	Product (HS2)	Value (ZARbn), 2022	% Share of WC Exports, 2022	WC % Share of SA Exports of Product, 2022
1	HST08: Edible fruit and nuts; peel of citrus fruit or melons	48.80	26.20%	67.27%
2	HST27: Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	22.55	12.11%	7.72%
3	HST22: Beverages, spirits and vinegar	14.02	7.53%	59.81%
4	HST84: Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	9.04	4.85%	8.33%
5	HST03: Fish and crustaceans, molluscs and other aquatic invertebrates	6.96	3.74%	87.18%
6	HST20: Preparations of vegetables, fruit, nuts or other parts of plants	6.71	3.60%	59.08%
7	HST72: Iron and steel	6.21	3.33%	5.80%
8	HST26: Ores, slag and ash	6.03	3.24%	2.33%
9	HST10: Cereals	4.51	2.42%	18.06%
10	HST71: Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin	4.09	2.19%	0.93%
11	HST85: Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	3.47	1.86%	11.31%
12	HST39: Plastics and articles thereof	3.11	1.67%	11.41%
13	HST97: Works of art, collectors' pieces and antiques	3.11	1.67%	44.31%
14	HST33: Essential oils and resinoids; perfumery, cosmetic or toilet preparations	2.95	1.59%	27.33%
15	HST12: Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder	2.31	1.24%	33.15%
	Total Western Cape Exports, 2022	186.23	100.00%	9.25%

Source: Quantec, 2023

The outcome is notably different when looking at the detailed level of products. The province's top five export products at an HS6 level in 2022 were light oils and preparations; fresh grapes; oranges; apples; and wine in containers holding 2 litres or less. Bituminous coal was the fastest growing export category (within the top 20 export category grouping) during the period 2018–2022, with an average annual growth rate of 99 616.39%. Other coal followed at a growth rate of 512.39% during this period.

Table 8: Top 15 Export Products (HS6) from the Western Cape, 2022				
Rank	Product (HS6)	Value (ZARbn), 2022	% Share of WC Exports, 2022	Ave Growth (%), 2018-2022
1	HST271012: -- Light oils and preparations (2012-)	12.52	6.72%	7.89%
2	HST080610: - Fresh grapes	10.46	5.61%	11.45%
3	HST080510: - Oranges	8.42	4.52%	8.24%
4	HST080810: - Apples	7.21	3.87%	12.02%
5	HST220421: -- Wine in containers holding 2 litres or less	7.09	3.81%	4.42%
6	HST080521: -- Mandarins (including tangerines and satsumas) (2017-)	6.40	3.44%	27.89%
7	HST270112: -- Bituminous coal	4.26	2.29%	99616.39%
8	HST270119: -- Other coal	3.70	1.99%	512.39%
9	HST080830: - Pears (2012-)	3.52	1.89%	8.28%
10	HST080550: - Lemons (Citrus limon, Citrus limonum) and limes (Citrus auranti- folia, Citrus latifolia) (2002-)	3.27	1.76%	13.23%
11	HST970600: Antiques of an age exceeding 100 years	3.11	1.67%	146.24%
12	HST260200: Manganese ores and concentrates, including ferruginous man- ganese ores and concentrates with a manganese content of 20 % or more, calculated on the dry weight	2.67	1.44%	98.93%
13	HST840999: -- Other engine part	2.66	1.43%	21.07%
14	HST711319: -- Of other precious metal, whether or not plated or clad with precious metal	2.55	1.37%	16.45%
15	HST220429: -- Other wine	2.49	1.33%	6.42%
	Total Western Cape Exports, 2022	186.23	100.00%	8.61%

Source: Quantec, 2023

The top five markets for the Western Cape's top five exported products (HS6) in 2022 are listed in Table 9. Light oils and preparations were mainly in demand in Botswana (ZAR5,852.38m or ZAR5.85bn), Lesotho (ZAR1,715.694m or ZAR1.72bn), eSwatini (ZAR1,024.19m or ZAR1.02bn), Namibia (ZAR254.74m), and Mauritius (ZAR204.12m). While the Netherlands was the Western Cape's top destination market for both fresh grapes, and oranges in 2022. The United Kingdom was the top destination market for both apples, and wine in containers holding 2 litres or less.

Table 9: Top Export Markets for Top Five Export Products (HS6), WC, 2022		
Rank	Light oils and preparations	Value (ZARm), 2022
1	BW: Botswana	5852.38
2	LS: Lesotho	1715.69
3	SZ: eSwatini	1024.19
4	NA: Namibia	254.74
5	MU: Mauritius	204.12
Rank	Fresh grapes	Value (ZARm), 2022
1	NL: Netherlands	4955.20
2	GB: United Kingdom	2401.66
3	CA: Canada	417.81
4	VN: Vietnam	270.42
5	IL: Israel	246.53

Table 9: Top Export Markets for Top Five Export Products (HS6), WC, 2022		
Rank	Oranges	Value (ZARm), 2022
1	NL: Netherlands	1397.09
2	U.S.: United States	829.06
3	RU: Russian Federation	710.42
4	CN: China	676.79
5	AE: United Arab Emirates	667.71
Rank	Apples	Value (ZARm), 2022
1	GB: United Kingdom	7206.08
2	NG: Nigeria	1112.86
3	MY: Malaysia	677.29
4	AE: United Arab Emirates	531.14
5	BD: Bangladesh	465.09
Rank	Wine - in containers holding 2 litres or less	Value (ZARm), 2022
1	GB: United Kingdom	1450.24
2	NL: Netherlands	668.28
3	U.S.: United States	597.77
4	DE: Germany	548.30
5	CA: Canada	420.39

Source: Quantec, 2023

7.2 Top imported products

When looking at imports from the perspective of products or groupings, (HS2), the mineral fuel products; bituminous substances; mineral waxes category dominated the province's import costs in 2022, which at a cost of ZAR171.60bn, was equivalent to 52.41% of the province's total import costs incurred. Nuclear reactors, boilers, machinery and mechanical appliances placed second at a cost of ZAR17.37bn (5.31%), while electrical machinery and equipment were third at a total cost of ZAR11.53bn (representing 3.52% of imports).

When looking at the percentage contribution of the cost of the Western Cape's top 15 import products at the HS2 level to South Africa's total import costs for these respective products, it is evident that the Western Cape dominated various import categories from a costing perspective in 2022.

These included the category of fish and crustaceans, molluscs and other aquatic invertebrates (with a share of 83.70%), followed by the preparations of vegetables, fruit, nuts or other parts of plants category, with the province accounting for 71.63% of South Africa's total associated import costs. This was followed by articles of apparel and clothing accessories, knitted or crocheted (55.00%). Articles of apparel and clothing accessories not knitted or crocheted (42.96%), and footwear, gaiters and the like; parts of such articles (42.78%) accounted for the fourth and fifth largest shares of South Africa's imports. This is reflected in the fifth column in Table 10 below.

Table 10: Top 15 Western Cape Import Products (HS2), 2022				
Rank	Product (HS2)	Value (ZARbn), 2022	% Share of WC Imports, 2022	WC % Share of SA Imports of Product, 2022
1	HST27: Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	171.60	52.41%	41.71%
2	HST84: Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	17.37	5.31%	8.50%
3	HST85: Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	11.53	3.52%	6.76%
4	HST61: Articles of apparel and clothing accessories, knitted or crocheted	9.42	2.88%	55.00%
5	HST64: Footwear, gaiters and the like; parts of such articles	7.11	2.17%	42.78%
6	HST62: Articles of apparel and clothing accessories, not knitted or crocheted	7.05	2.15%	42.96%
7	HST39: Plastics and articles thereof	6.89	2.10%	13.11%

Table 10: Top 15 Western Cape Import Products (HS2), 2022				
Rank	Product (HS2)	Value (ZARbn), 2022	% Share of WC Imports, 2022	WC % Share of SA Imports of Product, 2022
8	HST10: Cereals	5.33	1.63%	28.08%
9	HST03: Fish and crustaceans, molluscs and other aquatic invertebrates	4.77	1.46%	83.70%
10	HST90: Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; parts and accessories thereof	4.64	1.42%	12.39%
11	HST48: Paper and paperboard; articles of paper pulp, of paper or of paperboard	4.19	1.28%	20.49%
12	HST31: Fertilisers	3.93	1.20%	15.83%
13	HST38: Miscellaneous chemical products	3.56	1.09%	9.76%
14	HST20: Preparations of vegetables, fruit, nuts or other parts of plants	3.44	1.05%	71.63%
15	HST22: Beverages, spirits and vinegar	3.22	0.98%	28.64%
	Total Imports, 2022	327.41	100.00%	17.99%

Source: Quantec, 2023

Again, the outcome is notably different when looking at a more detailed level. The province's top five import products at an HS6 level in 2022 were light oils and preparations; petroleum oils and oils obtained from bituminous minerals, crude; semi-milled or wholly milled rice, whether or not polished or glazed; other – other footwear with outer soles and uppers of rubber or plastics; and of cotton – men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear).

Ammonium dihydrogen orthophosphate (monoammonium phosphate) and mixtures was the fastest growing import product (within the top 20 imports) during the period 2018–2022, with an average annual growth rate of 365.29%. Lithium-ion (2012-), with a growth rate of 140.93%; and urea, whether or not in aqueous solution, with a growth rate of 126.95%, followed in second and third position respectively.

Table 11: Top 15 Western Cape Import Products (HS6), 2022				
Rank	Product (HS2)	Value (ZARbn), 2022	% Share of WC Imports, 2022	Ave Growth (%), 2018-2022
1	HST271012: -- Light oils and preparations (2012-)	163.835	50.04%	55.79%
2	HST270900: Petroleum oils and oils obtained from bituminous minerals, crude	4.850	1.48%	-24.44%
3	HST100630: - Semi-milled or wholly milled rice, whether or not polished or glazed	3.706	1.13%	56.53%
4	HST640299: -- Other - Other footwear with outer soles and uppers of rubber or plastics	2.439	0.74%	17.79%
5	HST620342: -- Of cotton - Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear)	2.282	0.70%	14.72%
6	HST310540: - Ammonium dihydrogen orthophosphate (monoammonium phosphate) and mixtures thereof with diammonium hydrogen orthophosphate (diammonium phosphate)	1.905	0.58%	365.29%
7	HST300490: - Other medicaments	1.853	0.57%	5.40%
8	HST030353: -- Sardines (<i>Sardina pilchardus</i> , <i>Sardinops</i> spp.), sardinella (<i>Sardinella</i> spp.), brisling or sprats (<i>Sprattus sprattus</i>) (2012-)	1.788	0.55%	29.99%
9	HST640419: -- Other footwear with outer soles of rubber, plastics, leather or composition leather and uppers of textile materials	1.745	0.53%	19.64%
10	HST610910: - Of cotton (T-shirts, singlets and other vests, knitted or crocheted)	1.582	0.48%	11.67%
11	HST100199: -- Other (2012-) - Wheat and meslin	1.566	0.48%	33.84%
12	HST850760: - Lithium-ion (2012-)	1.477	0.45%	140.93%
13	HST310210: - Urea, whether or not in aqueous solution	1.476	0.45%	126.95%
14	HST200979: -- Other (2002-) - Fruit juices (including grape must) and vegetable juices,	1.267	0.39%	22.48%
15	HST160413: -- Sardines, sardinella and brisling or sprats	1.264	0.39%	21.84%
	Total Imports, 2022	327.41	100.00%	13.82%

Source: Quantec, 2023

The top five markets for the Western Cape's top five imported products (HS6) in 2022 are listed in Table 12. The top product, light oils and preparations, was mainly sourced from the United Arab Emirates (ZAR36,946.35m or ZAR36.95bn), India (ZAR30,982.88m or ZAR30.98bn), Saudi Arabia (ZAR22,178.41m or ZAR22.18bn), Oman (ZAR20,257.49m or ZAR20.26bn), and Turkey (ZAR9,964.63m or ZAR9.96bn). Nigeria and Congo were the top two source markets for crude petroleum oil for the province in 2022. While Thailand was the top source market for semi-milled or wholly milled rice. China was the top source market for other footwear with outer soles and uppers of rubber or plastics, and Mauritius was the top source market for the imports for men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear).

Table 12: Top Five Import Markets for Top Five Import Products (HS6), WC, 2022		
Rank	Light oils and preparations	Value (ZARm), 2022
1	AE: United Arab Emirates	36946.35
2	IN: India	30982.88
3	SA: Saudi Arabia	22178.41
4	OM: Oman	20257.49
5	TR: Turkey	9964.63
Rank	Petroleum oils, crude	Value (ZARm), 2022
1	NG: Nigeria	3078.61
2	CG: Congo	1771.09
3	U.S.: United States	(ZAR10,340 thousands).
4	Namibia	(ZAR50.00 thousands)
Rank	Semi-milled or wholly milled rice	Value (ZARm), 2022
1	TH: Thailand	3464.60
2	IN: India	134.48
3	PK: Pakistan	46.79
4	VN: Vietnam	38.45
5	U.S.: United States	7.15
Rank	Footwear - other footwear with outer soles and uppers of rubber or plastics	Value (ZARm), 2022
1	CN: China	1693.71
2	VN: Vietnam	301.44
3	ID: Indonesia	152.57
4	IT: Italy	120.66
5	KH: Cambodia	67.26
Rank	Articles of apparel and clothing accessories - of cotton - men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear)	Value (ZARm), 2022
1	MU: Mauritius	1052.92
2	CN: China	454.90
3	SZ: Swaziland	244.45
4	MG: Madagascar	243.46
5	BD: Bangladesh	173.06

Source: Quantec, 2023

7.3 The Western Cape's contribution to South African exports

In terms of the Western Cape's contribution to South African exports, Table 13 highlights key sectors and products for which the Western Cape is the leading exporter, as measured in terms of the percentage of South Africa's total exports for products at HS4 level, for categories where export values exceed ZAR50m.

Table 13: Western Cape Share of South African Exports >ZAR50m (HS4), 2022				
Rank	Product (HS4)	SA Export Value 2022, ZARm	WC Export Value 2022, ZARm	WC % Share of SA, 2022
1	HST1504: Fats and oils and their fractions, of fish or marine mammals, whether or not refined, but not chemically modified	537.32	536.64	99.87%
2	HST1205: Rape or colza seeds, whether or not broken	391.65	388.81	99.27%
3	HST2709: Petroleum oils and oils obtained from bituminous minerals, crude	204.71	200.31	97.85%
4	HST4113: Leather further prepared after tanning or crusting, including parchment-dressed leather, of other animals, without wool or hair on, whether or not split, other than leather of heading 41.14	647.75	631.57	97.50%
5	HST4106: Tanned or crust hides and skins of other animals, without wool or hair on, whether or not split, but not further prepared	125.16	121.45	97.03%
6	HST2513: Pumice stone; emery; natural corundum, natural garnet and other natural abrasives, whether or not heat-treated	646.98	627.62	97.01%
7	HST8905: Light-vessels, fire-floats, dredgers, floating cranes and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms	659.34	630.13	95.57%
8	HST0302: Fish, fresh or chilled, excluding fish fillets and other fish meat of heading 03.04	563.30	535.05	94.98%
9	HST1605: Crustaceans, molluscs and other aquatic invertebrates, prepared or preserved	219.43	208.17	94.87%
10	HST0809: Apricots, cherries, peaches (including nectarines), plums and sloes, fresh	3079.40	2903.46	94.29%
11	HST0813: Fruit, dried, other than that of headings 08.01 to 08.06; mixtures of nuts or dried fruits of this Chapter	766.32	716.10	93.45%
12	HST1212: Locust beans, seaweeds and other algae, sugar beet and sugar cane, fresh, chilled, frozen or dried, whether or not ground; fruit stones and kernels and other vegetable products (including unroasted chicory roots of the variety <i>Cichorium intybus sativum</i>) o	892.60	831.11	93.11%
13	HST2204: Wine of fresh grapes, including fortified wines; grape must other than that of heading 20.09	11358.75	10559.63	92.96%
14	HST2301: Flours, meals and pellets, of meat or meat offal, of fish or of crustaceans, molluscs or other aquatic invertebrates, unfit for human consumption; greaves	1562.43	1443.57	92.39%
15	HST6701: Skins and other parts of birds with their feathers or down, feathers, parts of feathers, down and articles thereof (other than goods of heading 05.05 and worked quills and scapes)	405.54	373.39	92.07%
16	HST0808: Apples, pears and quinces, fresh	11729.38	10724.35	91.43%
17	HST6111: Babies' garments and clothing accessories, knitted or crocheted	211.28	191.60	90.69%
18	HST7203: Ferrous products obtained by direct reduction of iron ore and other spongy ferrous products, in lumps, pellets or similar forms; iron having a minimum purity by weight of 99.94 %, in lumps, pellets or similar forms	105.85	93.25	88.10%
19	HST8901: Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods	212.22	183.50	86.46%
20	HST0604: Foliage, branches and other parts of plants, without flowers or flower buds, and grasses, mosses and lichens, being goods of a kind suitable for bouquets or for ornamental purposes, fresh, dried, dyed, bleached, impregnated or otherwise prepared	229.02	199.03	86.91%

Source: Quantec, 2023

Appendix 1 - Western Cape Exports by Region, 2022

Western Cape Exports, Classified by Region, 2022								
Rank	Region	Export Value 2018 (ZARbn)	Export Value 2019 (ZARbn)	Export Value 2020 (ZARbn)	Export Value 2021 (ZARbn)	Export Value 2022 (ZARbn)	Average Growth, 2018-2022	% Share of WC Exports, 2022
1	R45: European Union	24.87	23.82	30.73	34.45	38.67	10.59%	20.76%
2	R17: SACU (Excluding RSA)	24.35	26.16	23.13	27.90	32.20	7.26%	17.29%
3	R16: SADC (excluding SACU)	14.00	12.55	11.18	13.14	19.47	10.57%	10.46%
4	R25: NAFTA	10.73	10.81	13.91	19.29	18.81	14.11%	10.10%
5	R31: Eastern Asia	10.27	9.94	12.11	18.55	18.20	14.86%	9.77%
6	R44: Western Europe Rest	10.05	9.70	13.06	12.90	13.04	7.41%	7.00%
7	R34: Western Asia	6.63	5.48	8.57	8.93	10.79	13.48%	5.79%
8	R33: South-eastern Asia	3.54	4.51	3.99	5.07	6.62	12.05%	3.56%
9	R71: Not allocated	6.86	7.03	5.18	3.15	6.17	7.74%	3.32%
10	R32: South-central Asia	2.55	2.74	3.33	6.84	5.11	19.81%	2.74%
11	R15: Western Africa	3.89	3.06	3.56	4.00	4.13	3.16%	2.22%
12	R41: Eastern Europe	2.43	2.22	3.64	3.79	3.76	13.23%	2.02%
13	R11: Eastern Africa Rest	4.38	4.77	2.12	1.99	2.33	-3.75%	1.25%
14	R51: Australia and New Zealand	1.66	1.58	2.14	2.20	2.26	7.13%	1.21%
15	R24: South America	0.71	0.70	0.73	0.86	1.48	18.32%	0.80%
16	R13: Northern Africa	0.27	0.30	0.35	0.48	1.10	28.62%	0.59%
17	R42: Northern Europe	0.43	0.47	0.45	0.34	0.94	38.50%	0.51%
18	R12: Middle Africa Rest	0.42	0.44	0.43	0.41	0.69	14.47%	0.37%
19	R52: Melanesia	0.05	0.01	0.07	0.10	0.13	95.06%	0.07%
20	R22: Central America	0.21	0.21	0.03	0.06	0.13	29.55%	0.07%
21	R21: Caribbean	0.71	0.82	0.46	0.46	0.11	-21.22%	0.06%
22	R61: Antarctica	0.02	0.01	0.01	0.03	0.04	18.42%	0.02%
23	R43: Southern Europe	0.22	0.27	0.03	0.05	0.03	-1.48%	0.02%
24	R54: Polynesia	0.03	0.02	0.03	0.00	0.00	-7.50%	0.00%
25	R23: Northern America	0.01	0.02	0.00	0.00	0.00	5.78%	0.00%
26	R53: Micronesia	0.14	0.30	0.00	0.01	0.00	-5.11%	0.00%
	C0: World	129.45	127.93	139.26	164.98	186.23	8.61%	100.00%

Source: Quantec, 2023

Appendix 2 - Western Cape Imports by Region, 2022

Western Cape Imports, Classified by Region, 2022								
Rank	Region	Import Value 2018 (ZARbn)	Import Value 2019 (ZARbn)	Import Value 2020 (ZARbn)	Import Value 2021 (ZARbn)	Import Value 2022 (ZARbn)	Average Growth, 2018-2022	% Share of WC Imports, 2022
1	R34: Western Asia	58.69	58.75	35.81	55.83	102.73	34.50%	31.38%
2	R31: Eastern Asia	32.94	33.39	44.53	54.55	59.11	12.26%	18.05%
3	R45: European Union	32.97	34.97	34.80	44.86	47.15	9.97%	14.40%
4	R32: South-central Asia	9.29	11.21	11.58	18.77	38.68	30.90%	11.81%
5	R33: South-eastern Asia	11.50	12.86	14.76	15.87	26.45	22.06%	8.08%
6	R25: NAFTA	7.19	9.07	7.67	8.67	9.53	5.98%	2.91%
7	R44: Western Europe Rest	6.88	6.66	5.12	6.58	6.52	-0.94%	1.99%
8	R17: SACU (Excluding RSA)	6.51	6.67	4.78	5.54	6.45	2.84%	1.97%
9	R24: South America	4.68	3.77	5.52	4.79	5.39	5.48%	1.65%
10	R15: Western Africa	27.55	34.41	19.81	4.70	4.78	12.12%	1.46%
11	R41: Eastern Europe	0.69	0.64	1.83	1.72	3.86	60.31%	1.18%
12	R16: SADC (excluding SACU)	14.32	9.48	2.88	3.77	3.78	-17.18%	1.16%
13	R71: Not allocated	0.43	0.82	0.42	2.18	3.58	102.86%	1.09%
14	R11: Eastern Africa Rest	1.08	1.17	1.42	1.70	2.42	21.33%	0.74%
15	R51: Australia and New Zealand	1.26	0.98	1.16	1.75	1.82	10.15%	0.56%
16	R12: Middle Africa Rest	0.34	0.34	0.04	0.06	1.82	550.95%	0.56%
17	R13: Northern Africa	0.82	1.02	1.02	1.18	1.69	10.91%	0.52%
18	R53: Micronesia	0.00	0.00	0.13	0.00	0.66	17764.88%	0.20%
19	R42: Northern Europe	1.13	1.58	0.64	0.44	0.57	37.05%	0.17%
20	R43: Southern Europe	0.02	0.02	0.03	0.07	0.22	78.77%	0.07%
21	R22: Central America	0.08	0.06	0.05	0.09	0.14	12.29%	0.04%
22	R21: Caribbean	0.04	0.07	0.03	0.03	0.03	-0.84%	0.01%
23	R54: Polynesia	0.00	0.02	0.01	0.04	0.01	141.89%	0.00%
24	R23: Northern America	0.00	0.00	0.00	0.00	0.00	8254.06%	0.00%
25	R52: Melanesia	0.00	0.00	0.00	0.00	0.00	-2.49%	0.00%
26	R61: Antarctica	0.00	0.00	0.00	0.00	0.00	1109.42%	0.00%
	C0: World	218.40	227.96	194.06	233.19	327.41	13.82%	100.00%

Source: Quantec, 2023

Appendix 3 - Top 20 Western Cape Exports, 2022 (HS2)

Top 20 Western Cape Export Products, 2022: HS2								
Rank	Product (HS2)	Export Value 2018 (ZARbn)	Export Value 2019 (ZARbn)	Export Value 2020 (ZARbn)	Export Value 2021 (ZARbn)	Export Value 2022 (ZARbn)	Average Growth 2018-2022	% Share of WC Exports, 2022
1	HST08: Edible fruit and nuts; peel of citrus fruit or melons	30.37	30.36	42.08	46.02	48.80	11.87%	26.20%
2	HST27: Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	16.27	18.92	9.52	18.05	22.55	17.66%	12.11%
3	HST22: Beverages, spirits and vinegar	11.66	11.02	11.80	13.25	14.02	4.91%	7.53%
4	HST84: Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	6.05	6.59	6.10	8.11	9.04	10.45%	4.85%
5	HST03: Fish and crustaceans, molluscs and other aquatic invertebrates	5.84	5.93	6.22	6.77	6.96	6.55%	3.74%
6	HST20: Preparations of vegetables, fruit, nuts or other parts of plants	4.41	4.30	5.14	5.62	6.71	7.87%	3.60%
7	HST72: Iron and steel	7.00	5.26	2.26	5.28	6.21	17.25%	3.33%
8	HST26: Ores, slag and ash	1.03	2.34	2.82	3.42	6.03	54.61%	3.24%
9	HST10: Cereals	0.22	0.22	0.74	2.13	4.51	95.90%	2.42%
10	HST71: Natural or cultured pearls, precious or semi-precious stones, precious metals, metals clad with precious metal, and articles thereof; imitation jewellery; coin	2.31	2.12	2.39	3.27	4.09	12.99%	2.19%
11	HST85: Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	2.16	2.13	2.70	2.58	3.47	5.37%	1.86%
12	HST39: Plastics and articles thereof	2.03	1.94	2.13	2.47	3.11	7.73%	1.67%
13	HST97: Works of art, collectors' pieces and antiques	2.90	1.95	2.68	1.77	3.11	90.22%	1.67%
14	HST33: Essential oils and resinoids; perfumery, cosmetic or toilet preparations	2.18	2.06	2.76	3.06	2.95	7.55%	1.59%
15	HST12: Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder	1.57	1.42	1.94	2.06	2.31	10.53%	1.24%
16	HST25: Salt; sulphur; earths and stone; plastering materials, lime and cement	1.71	1.18	0.95	1.25	1.99	17.18%	1.07%
17	HST23: Residues and waste from the food industries; prepared animal fodder	1.50	1.15	2.14	1.58	1.97	16.21%	1.06%
18	HST21: Miscellaneous edible preparations	1.29	1.26	1.97	1.74	1.96	11.72%	1.05%
19	HST61: Articles of apparel and clothing accessories, knitted or crocheted	1.11	0.71	1.34	1.83	1.85	14.40%	1.00%
20	HST90: Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; parts and accessories thereof	1.07	1.31	1.21	1.41	1.79	8.05%	0.96%
	Total Exports	129.45	127.93	139.26	164.98	186.23	8.61%	100.00%

Source: Quantec, 2023

Appendix 4 - Top 20 Western Cape Imports, 2022 (HS2)

Top 20 Western Cape Import Products, 2022: HS2								
Rank	Product (HS2)	Import Value 2018 (ZARbn)	Import Value 2019 (ZARbn)	Import Value 2020 (ZARbn)	Import Value 2021 (ZARbn)	Import Value 2022 (ZARbn)	Import Growth 2018-2022	% Share of WC Imports, 2022
1	HST27: Mineral fuels, mineral oils and products of their distillation; bituminous substances; mineral waxes	110.37	113.78	71.38	95.07	171.60	24.34%	52.41%
2	HST84: Nuclear reactors, boilers, machinery and mechanical appliances; parts thereof	11.45	12.44	11.85	14.67	17.37	10.45%	5.31%
3	HST85: Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	7.33	10.28	15.42	15.56	11.53	11.78%	3.52%
4	HST61: Articles of apparel and clothing accessories, knitted or crocheted	4.34	4.19	6.54	8.16	9.42	15.54%	2.88%
5	HST64: Footwear, gaiters and the like; parts of such articles	3.23	3.23	4.91	5.63	7.11	16.70%	2.17%
6	HST62: Articles of apparel and clothing accessories, not knitted or crocheted	4.77	4.70	6.08	6.34	7.05	8.17%	2.15%
7	HST39: Plastics and articles thereof	5.47	5.21	4.99	5.93	6.89	7.38%	2.10%
8	HST10: Cereals	2.33	3.64	5.87	4.23	5.33	22.50%	1.63%
9	HST03: Fish and crustaceans, molluscs and other aquatic invertebrates	3.49	3.59	2.97	3.77	4.77	9.44%	1.46%
10	HST90: Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus; parts and accessories thereof	3.49	3.54	3.52	3.84	4.64	6.94%	1.42%
11	HST48: Paper and paperboard; articles of paper pulp, of paper or of paperboard	2.59	2.69	2.59	2.75	4.19	14.67%	1.28%
12	HST31: Fertilisers	0.24	0.29	0.27	1.49	3.93	126.18%	1.20%
13	HST38: Miscellaneous chemical products	2.31	2.52	2.78	3.16	3.56	12.56%	1.09%
14	HST20: Preparations of vegetables, fruit, nuts or other parts of plants	2.27	2.70	2.60	2.80	3.44	10.99%	1.05%
15	HST22: Beverages, spirits and vinegar	4.83	5.95	1.84	2.44	3.22	6.72%	0.98%
16	HST29: Organic chemicals	1.65	1.73	1.81	2.39	3.00	16.06%	0.92%
17	HST33: Essential oils and resinoids; perfumery, cosmetic or toilet preparations	1.81	1.84	1.97	2.29	2.64	12.55%	0.81%
18	HST30: Pharmaceutical products	2.39	1.87	2.31	3.66	2.45	8.76%	0.75%
19	HST95: Toys, games and sports requisites; parts and accessories thereof	1.69	1.64	1.36	1.78	2.37	8.45%	0.72%
20	HST73: Articles of iron or steel	1.55	1.65	1.57	1.87	2.26	9.54%	0.69%
	Total Imports	218.4	227.96	194.06	233.19	327.41	13.82%	100.00%

Source: Quantec, 2023

Appendix 5 - Top 20 Western Cape Export Products, 2022 (HS4)

Top 20 Western Cape Export Products, 2022: HS4								
Rank	Product (HS4)	Export Value 2018 (ZARbn)	Export Value 2019 (ZARbn)	Export Value 2020 (ZARbn)	Export Value 2021 (ZARbn)	Export Value 2022 (ZARbn)	Average Growth 2018-2022	% Share of WC Exports, 2022
1	HST0805: Citrus fruit, fresh or dried	12.79	12.10	18.86	19.46	19.66	13.14%	10.56%
2	HST2710: Petroleum oils and oils obtained from bituminous minerals, other than crude	14.76	17.99	8.04	8.20	13.06	8.04%	7.01%
3	HST0806: Grapes, fresh or dried	6.76	6.86	8.01	9.83	11.02	10.90%	5.92%
4	HST0808: Apples, pears and quinces, fresh	6.63	6.99	9.17	9.43	10.72	10.63%	5.76%
5	HST2204: Wine of fresh grapes, including fortified wines; grape must other than that of heading 20.09	9.24	8.40	9.64	10.56	10.56	4.39%	5.67%
6	HST2701: Coal; briquettes, ovoids and similar solid fuels manufactured from coal	0.25	0.03	0.30	1.63	8.12	309.90%	4.36%
7	HST7210: Flat-rolled products of iron or non-alloy steel, of a width of 600 mm or more, clad, plated or coated	1.25	0.87	1.16	3.47	3.93	38.03%	2.11%
8	HST1005: Maize (corn)	0.02	0.05	0.48	1.77	3.73	265.78%	2.00%
9	HST9706: Antiques of an age exceeding one hundred years	2.71	1.38	2.35	1.44	3.11	146.24%	1.67%
10	HST0809: Apricots, cherries, peaches (including nectarines), plums and sloes, fresh	1.42	1.27	1.57	2.43	2.90	17.24%	1.56%
11	HST2008: Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included	1.69	2.01	2.07	1.98	2.89	10.19%	1.55%
12	HST2009: Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter	1.97	1.75	2.35	2.74	2.74	7.06%	1.47%
13	HST8409: Parts suitable for use solely or principally with the engines of heading 84.07 or 84.08	1.95	2.17	1.25	2.38	2.68	20.95%	1.44%
14	HST2602: Manganese ores and concentrates, including ferruginous manganese ores and concentrates with a manganese content of 20 % or more, calculated on the dry weight	0.39	0.99	1.30	1.85	2.67	98.93%	1.44%
15	HST7113: Articles of jewellery and parts thereof, of precious metal or of metal clad with precious metal	1.26	1.37	1.75	2.32	2.57	16.31%	1.38%
16	HST0810: Other fruit, fresh	1.50	2.06	2.71	3.02	2.35	13.67%	1.26%
17	HST3304: Beauty or make-up preparations and preparations for the care of the skin (other than medicaments), including sunscreen or sun tan preparations; manicure or pedicure preparations	1.71	1.59	2.10	2.28	2.13	7.50%	1.14%
18	HST0304: Fish fillets and other fish meat (whether or not minced), fresh, chilled or frozen	1.80	1.92	1.95	2.04	2.07	7.70%	1.11%
19	HST0303: Fish, frozen, excluding fish fillets and other fish meat of heading 03.04	1.48	1.76	2.12	1.94	1.89	6.52%	1.02%
20	HST0307: Molluscs, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine; smoked molluscs, whether in shell or not, whether or not cooked before or during the smoking process	1.39	0.99	0.98	1.36	1.63	12.01%	0.88%
	Total Exports	129.45	127.93	139.26	164.98	186.23	8.61%	100.00%

Source: Quantec, 2023

Appendix 6 - Top 20 Western Cape Import Products, 2022 (HS4)

Top 20 Western Cape Import Products, 2022: HS4								
Rank	Product (HS4)	Import Value 2018 (ZARbn)	Import Value 2019 (ZARbn)	Import Value 2020 (ZARbn)	Import Value 2021 (ZARbn)	Import Value 2022 (ZARbn)	Import Growth 2018-2022	% Share of WC Imports, 2022
1	HST2710: Petroleum oils and oils obtained from bituminous minerals, other than crude; preparations not elsewhere specified or included, containing by weight 70 % or more of petroleum oils or of oils obtained from bituminous minerals, these oils being the basic con	27.49	32.82	33.59	83.80	164.06	55.62%	50.11%
2	HST2709: Petroleum oils and oils obtained from bituminous minerals, crude	81.17	79.71	36.52	9.50	4.85	-24.44%	1.48%
3	HST1006: Rice	1.31	2.47	3.96	3.41	3.74	32.15%	1.14%
4	HST6402: Other footwear with outer soles and uppers of rubber or plastics	1.31	1.31	2.17	2.55	3.32	18.26%	1.01%
5	HST0303: Fish, frozen, excluding fish fillets and other fish meat of heading 03.04	1.90	2.04	1.66	2.07	2.88	13.25%	0.88%
6	HST6203: Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear)	1.49	1.50	2.02	2.18	2.73	13.05%	0.83%
7	HST6404: Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of textile materials	1.23	1.09	1.73	2.13	2.73	18.44%	0.83%
8	HST6204: Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, bib and brace overalls, breeches and shorts (other than swimwear)	1.48	1.46	1.71	1.81	2.29	10.39%	0.70%
9	HST3105: Mineral or chemical fertilisers containing two or three of the fertilising elements nitrogen, phosphorus and potassium; other fertilisers; goods of this Chapter in tablets or similar forms or in packages of a gross weight not exceeding 10 kg	0.07	0.07	0.09	0.91	2.23	213.87%	0.68%
10	HST3004: Medicaments (excluding goods of heading 30.02, 30.05 or 30.06) consisting of mixed or unmixed products for therapeutic or prophylactic uses, put up in measured doses (including those in the form of transdermal administration systems) or in forms or packi	2.14	1.65	2.09	1.96	2.18	6.38%	0.67%
11	HST6109: T-shirts, singlets and other vests, knitted or crocheted	1.09	1.22	1.57	1.81	2.09	9.79%	0.64%
12	HST2711: Petroleum gases and other gaseous hydrocarbons	1.10	0.77	1.18	1.58	2.03	32.49%	0.62%
13	HST1604: Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs	1.56	1.74	1.41	1.29	1.84	10.84%	0.56%
14	HST2009: Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter	1.27	1.55	1.07	1.30	1.78	16.91%	0.54%
15	HST8471: Automatic data processing machines and units thereof; magnetic or optical readers, machines for transcribing data onto data media in coded form and machines for processing such data, not elsewhere specified or included	0.51	0.64	1.22	1.50	1.78	36.68%	0.54%

Top 20 Western Cape Import Products, 2022: HS4								
Rank	Product (HS4)	Import Value 2018 (ZARbn)	Import Value 2019 (ZARbn)	Import Value 2020 (ZARbn)	Import Value 2021 (ZARbn)	Import Value 2022 (ZARbn)	Import Growth 2018-2022	% Share of WC Imports, 2022
16	HST8516: Electric instantaneous or storage water heaters and immersion heaters; electric space heating apparatus and soil heating apparatus; electro-thermic hair-dressing apparatus (for example, hair dryers, hair curlers, curling tong heaters) and hand dryers; ele	1.03	1.25	1.39	1.57	1.73	11.06%	0.53%
17	HST2208: Undenatured ethyl alcohol of an alcoholic strength by volume of less than 80 % vol.; spirits, liqueurs and other spirituous beverages	2.44	2.66	0.94	1.38	1.70	2.93%	0.52%
18	HST3102: Mineral or chemical fertilisers, nitrogenous	0.15	0.20	0.15	0.52	1.66	96.03%	0.51%
19	HST8507: Electric accumulators, including separators therefor, whether or not rectangular (including square)	0.15	0.20	0.33	0.36	1.66	101.63%	0.51%
20	HST8418: Refrigerators, freezers and other refrigerating or freezing equipment, electric or other; heat pumps other than air conditioning machines of heading 84.15	0.66	0.71	1.13	1.31	1.65	22.79%	0.50%
	Total Exports	218.40	227.96	194.06	233.19	327.41	13.82%	100.00%

Source: Quantec, 2023

+27 (0) 21 487 8600 | www.wesgro.co.za | invest@wesgro.co.za

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