



Confederation of Indian Industry
125 Years: 1895-2020

CII Market Facilitation Services

Import Profile Series

Trade Opportunities in **SOUTH AFRICA**

May 2020



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Published by Confederation of Indian Industry (CII), The Mantosh Sondhi Centre; 23, Institutional Area, Lodi Road, New Delhi 110003, India, Tel: +91-11-24629994-7; Fax: +91-11-24626149; Email: info@cii.in; Web: www.cii.in

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1. Executive Summary

South Africa is today considered as one of the most prominent economies of the African continent — it figures amongst the five-largest economies that contributed to more than half of Africa’s growth in 2019. Historically, it was South Africa’s political transition that paved the way for its economic recovery and subsequent growth. With its first non-racial elections held in 1994 following the end of the apartheid era, the-then elected African National Congress (ANC) was faced with the formidable task of putting the economy, which was marred by external sanctions and internal conflicts, back on track. However, the increased centralisation of the economy resulted in subdued economic growth until the beginning of 2000. Thereafter, in 2000, the political leadership took concrete policy measures to boost the country’s economic growth and foreign investment by relaxing restrictive labour laws, ramping up the pace of privatisation and cutting interest rates sharply from 1998 levels. These reforms bore results with economic growth, employment and capital formation picking up significantly from 2004 onwards. However, the global recession of 2009 affected the South African economy significantly, resulting in a continuous decline in the export volumes and private investment.

According to the World Bank, the country’s economic growth slowed down to 0.8% in 2018, compared to 1.3% in the previous year. This lacklustre performance is mainly due to the decline in investment spending, fall in foreign direct investment, weakening public finances caused by rising debt burden and structural impediments. The World Bank projects 2019 growth at 1.3%, accelerating further to 1.7% in 2020. Given the country’s population growth, the growth in per-capita gross domestic product (GDP) has been close to nil since 2014.

In response to the COVID-19 situation, the South African government has announced various stimulus measures to insulate the South African economy from the adverse impact of COVID-19 to the extent possible. Some of these include the following:

- ❑ Reduction in repo rate by the Reserve Bank by 200 basis points from 6.25% to 4.25%.
- ❑ **Support to small, micro and medium-sized enterprises (SMMEs):** Finalisation of ‘SME Support Intervention’ by the Department of Small Business Development comprising a debt relief fund and a business growth/resilience facility to mitigate the impact of the expected economic slowdown on SMMEs in South Africa. This includes the following:
 - The debt relief fund is providing relief to SMMEs on existing debts and repayments. For an SMME to be eligible for assistance under the debt relief fund, the applicant must demonstrate a direct link between the impact or potential impact of COVID-19 on the business operations. The department has made over R500 million available to the debt relief fund with discussions underway for increasing allocation towards this fund.
 - Creation of business growth or resilience facility to enable continued participation by SMEs in supply value-chains, in particular those who manufacture locally or supply various products that are in demand due to current shortages arising from COVID-19. The business growth or resilience facility will

offer working capital, stock, bridging finance, order finance and equipment finance; the amount will be based on the funding needs of the business.

- ❑ **Support to travel, tourism and hospitality sectors:** The Department of Tourism has allocated an additional R200 million to assist SMMEs in the hospitality and tourism sector across all nine provinces and various tourism sub-sectors in the categories of accommodation, hospitality and related services, as well as travel and related services. Preference will be given to SMMEs in rural areas and townships and those owned by women, young people and people with disabilities. To be eligible for assistance, the SMME must satisfy the applicable qualifying criteria. Large enterprises can avail the relief measures provided by the Unemployment Insurance Fund (UIF) benefit scheme.

- ❑ **Support to health sector:** The Department of Science and Innovation has made R12 million available to support research in response to the COVID-19 pandemic and will redirect a further R30 million towards interventions to combat the pandemic.

- ❑ **Industrial Development Corporation (IDC) support:** The IDC and the Department of Trade, Industry and Competition have compiled a more than R3 billion package for industrial funding to help vulnerable businesses and fast-track funding to businesses that are considered vital for addressing the impact of the COVID-19 pandemic. This funding is available only to South African-owned businesses. A significant portion of the funding has been allocated as follows:
 - R500 million for trade finance to import essential medical products.
 - R700 million for working capital, equipment and machinery.
 - The remaining portion of the funding will be allocated for ensuring food security by prioritizing support to agriculture and food value chains, providing working capital to the tourism sector, bridging finance to support supply chain interruptions, providing working capital to ensure energy security by supporting suppliers of primary energy and for providing working capital and bridging finance to SMMEs that provide components to car-makers.

In addition, the IDC is providing a capital allocation of R3 billion in the second quarter of 2020 to support businesses during the COVID-19 pandemic.

- ❑ **Support to agriculture and food sector:** The Department of Agriculture, Land Reform and Rural Development has set aside R1.2 billion to address the effects of the COVID-19 pandemic and ensure sustainable food production. The department has also made R100 million available to the Land Bank to assist farmers in distress.

- ❑ **National Empowerment Fund (NEF) support:** The NEF is making R200 million in loans available for black entrepreneurs to manufacture and supply a range of medical products, including medical masks, sanitisers, dispensers and related healthcare products (‘priority products and services’) in order to support the healthcare sector during the COVID-19 pandemic. The primary purpose of these

loans must be to purchase machinery, equipment and raw materials or to fund other working capital requirements needed to manufacture and supply priority products and services. Each black-owned business can apply for R500,000 to R10 million of funding. The loans are offered at 0% interest for the first year and thereafter at an interest rate of 2.5% per year. These loans will be repayable over a maximum term of 60 months. Each black entrepreneur must meet the requisite eligibility criteria to qualify for funding.

- ❑ **Unemployment Insurance Fund (UIF) support:** Following discussions with the Minister of Employment and Labour, the UIF has developed a COVID-19 Temporary Employer-Employee Relief Scheme to assist employers unable to pay the full salaries of any workers sent home during the lockdown. The UIF will engage with companies, sectoral associations and bargaining councils.

- ❑ **Support to the retail sector:** The Minister of Trade, Industry and Competition has issued a block exemption for the retail property sector. This support measure exempts a category of agreements or practices between designated retail property tenants and landlords from the application of Section 4 (agreements between competitors) and Section 5 (agreements between suppliers, firms and customers) of the Competition Act at the request of and in coordination with the Department of Trade, Industry and Competition. The block exemption extends to all of the following South African designated retail tenants, including small and independent retailers, unless otherwise authorised by the minister or the Competition Commission such as clothing, footwear and home textile retailers, personal care services (such as hairdressers, health and beauty salons) and restaurants.

- ❑ **Introduction of tax relief measures** such as delay of remittances of the ‘pay as you earn’ (PAYE) and other employment taxes liabilities, without any penalties or interest, including an acceleration of certain employment tax incentives. These include the following:
 - The South African revenue service will accelerate payments of employment tax incentive reimbursements so that tax-compliant employers receive them each month (up from twice a year).
 - Tax-compliant businesses with an annual turnover of less than R50 million may delay 20% of their pay-as you-earn liabilities over the next four months. They will also be eligible to delay their provisional corporate income tax payments without penalties or interest over the next six months.

With an estimated population of ~58 million in 2018, South Africa is the fifth-most populous nation in the African continent. South Africa has high levels of urbanisation, with 66.4% of its population residing in urban areas; it offers further scope for urbanisation-related economic and business activity nearly 34% of its population is still rural. South Africa has a relatively young population with 65% of its population in the age group of 20–64 years in 2018; the population in the age bracket of 65 years and more accounted for 5% of the aggregate population in 2018. The increasing working age population implies growing demand for new skills/skills upgradation.

In the World Bank's *Doing Business 2020* report, South Africa ranked 84th amongst the 190 countries on the *Ease of Doing Business* rankings, slipping in ranking by two places compared to the previous year's rankings. While South Africa stood fifth among the African nations, the country's business confidence has fallen to its lowest in 20 years. This slippage in ranking is primarily on account of the delay in implementation of ease of doing business reforms and regulatory inefficiencies leading to deterioration in rankings across all areas of doing business including starting business, getting electricity, dealing with construction permits, registering property, getting credit, resolving insolvency and trading across borders.

Given this strategic context, CII has prepared this detailed report on South Africa's import profile providing in-depth insights into South Africa's import basket. In addition to covering South Africa's socio-economic fundamentals briefly, the report deep dives into South Africa's import profile comprising of a detailed analysis resulting in shortlist of products that hold potential for Indian business to export to the country.

This report comes at a time when the world is passing through a challenging period due to the spread of COVID-19. With investment activity being completely stalled at the moment and demand for FDI significantly impacted given the global moratorium on travel, this immediately calls for scouting for export opportunities for Indian businesses. Moreover, the COVID-19 outbreak has resulted in supply disruptions particularly from China. According to the UNCTAD report on *Global Trade Impact of COVID-19 Epidemic*, about 20% of global trade in manufacturing intermediate products originated in China (up from 4% in 2002), thus making it the main supplier of intermediate inputs for manufacturing companies abroad. This reduction in Chinese imports of commodities offers opportunities for Indian exporters to step up and fill in the gaps created by disruption in China's exports.

2. Top Imports, CAGR and Countries

International trade has played a moderately important role in driving South Africa's economic growth, accounting for 60% of the country's GDP in 2018, as per World Bank data. A leading economy of the African continent, South Africa has over time become increasingly open to external trade, moving away from a highly protected, inward-looking economy towards an internationally-competitive economy.

According to the World Bank, in 2018, South Africa's imports of goods and services as a percentage of GDP was 30%, whereas exports of goods and services as a percentage of GDP was 30%, thus pointing to a balanced share of imports and exports in the country's overall trade.

The primary objective of this report is to undertake a thorough analysis of the country's import basket with the aim of highlighting South Africa's export potential for Indian industry. As a starting point for this analysis, the table below provides a list of the top 25 products imported by South Africa over the period 2015–19 and the imports' compound annual growth rate (CAGR).

TABLE 1: SOUTH AFRICA TOP 25 IMPORTS AND IMPORTS' CAGR (in US\$ million)

S. No.	HS CODES	PRODUCT	2015	2016	2017	2018	2019	IMPORTS' CAGR
1.	270900	Petroleum oils and oils obtained from bituminous minerals, crude	7,707	6,518	6,417	10,923	8,840	3%
2.	271012	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "ASTM D 86 method" (excluding containing biodiesel)	4,633	2,610	4,382	4,482	4,435	-1%
3.	851762	Machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus (excluding telephone sets, telephones for cellular networks or for other wireless networks)	811	728	1,024	1,580	1,437	15%
4.	300490	Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes, put up in measured doses "incl. those in the form of transdermal administration" or in forms or packings for retail sale (excluding medicaments containing antibiotics, medicaments containing hormones or steroids used as hormones, but not containing antibiotics, medicaments containing alkaloids or derivatives thereof but not containing hormones or antibiotics and medicaments containing provitamins, vitamins or derivatives thereof used as vitamins)	1,324	1,147	1,352	1,537	1,387	1%
5.	851712	Telephones for cellular networks "mobile telephones" or for other wireless networks	2,046	1,835	1,672	1,351	1,134	-14%
6.	490700	Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title	8.7	12.9	291	1,248	1,130	238%
7.	870322	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston	1,150	836	1,022	1,068	1,109	-1%

		engine of a cylinder capacity > 1.000 cm ³ but <= 1.500 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)							
8.	870323	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity > 1.500 cm ³ but <= 3.000 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)	1,120	866	1,067	957	1,087	-1%	
9.	847130	Data-processing machines, automatic, portable, weighing <= 10 kg, consisting of at least a central processing unit, a keyboard and a display (excluding peripheral units)	873	670	782	856	827	-1%	
10.	847150	Processing units for automatic data-processing machines, whether or not containing in the same housing one or two of the following types of unit: storage units, input units, output units (excluding those of heading 8471.41 or 8471.49 and excluding peripheral units)	303	283	339	441	581	18%	
11.	880240	Aeroplanes and other powered aircraft of an of an unladen weight > 15000 kg (excluding helicopters and dirigibles)	393	676	553	331	536	8%	
12.	870332	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a cylinder capacity > 1.500 cm ³ but <= 2.500 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)	624	566	664	629	531	-4%	
13.	281820	Aluminium oxide (excluding artificial corundum)	455	348	500	696	504	3%	
14.	870321	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal	394	312	453	524	502	6%	

		combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)						
15.	710231	Non-industrial diamonds unworked or simply sawn, cleaved or bruted (excluding industrial diamonds)	319	389	391	518	468	10%
16.	330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, with a basis of one or more of these substances, of a kind used in the food and drink industries; other preparations based on odoriferous substances, of a kind used for the manufacture of beverages	375	372	475	483	464	5%
17.	100630	Semi-milled or wholly milled rice, whether or not polished or glazed	422	406	460	468	429	0%
18.	851770	Parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus for the transmission or reception of voice, images or other data, n.e.s.	370	239	333	386	399	2%
19.	100199	Wheat and meslin (excluding seed for sowing, and durum wheat)	476	309	329	406	394	-5%
20.	901890	Instruments and appliances used in medical, surgical or veterinary sciences, n.e.s.	330	328	340	367	389	4%
21.	843149	Parts of machinery of heading 8426, 8429 and 8430, n.e.s.	376	296	353	409	387	1%
22.	844399	Parts and accessories of printers, copying machines and facsimile machines, n.e.s. (excluding of printing machinery used for printing by means of plates, cylinders and other printing components of heading 8442)	449	352	364	414	367	-5%
23.	870421	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705)	431	288	376	435	343	-6%
24.	740811	Wire of refined copper, with a maximum cross-sectional dimension of > 6 mm	287	156	311	261	343	5%
25.	850440	Static converters	363	250	310	304	342	-1%

Source: ITC Trade Map; MFS Analysis

South Africa's import basket has a balance of fossil fuel products, electronics, motor vehicles, machinery and equipment, pharmaceuticals, aircraft, aluminium, copper, and food and agri products; in addition, it also has some unique import items that have not been observed in the other import profiles undertaken so far, in the form of substantial imports of printing industry products, diamonds, and essential oils and perfumes. Overall, the country's imports exhibit a lukewarm, and at times negative, trend for some important commodities, while indicating a substantial import demand for some non-essential products.

The analysis below provides a list of top exporters for each of the top 25 products so as to provide a comprehensive overview of South Africa's import profile. The analysis below also examines India's exports of these products to South Africa (if any) and the tariffs levied by South Africa. It is hoped that the analysis below can highlight some instances where Indian industry can increase its share in South Africa's imports' basket by undertaking focussed exports projects.

TABLE 2: TOP 5 EXPORTING COUNTRIES, INDIA'S EXPORTS AND RANK, TARIFF LEVIED (for 2019)

HS CODE 270900: Petroleum oils and oils obtained from bituminous minerals, crude				
S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	Nigeria	3,491	-	0.0%
2.	Saudi Arabia	2,829		
3.	UAE	1,043		
4.	Ghana	629		
5.	Angola	544		

Sources: ITC Trade Map; WTO

Crude oil is South Africa biggest import item, displaying a low-but-steady imports' CAGR of 3% for 2015–19. India does not feature as a source country for crude oil as India has no resources of petroleum oil and, therefore, has no exports of this product category either to South Africa or to any other country. India is one of the largest crude oil refiners in the world and is, therefore, a major exporter of refined petroleum products, but not of crude oil. See list of importers of HS Code 270900 in Annexure 1.

(for 2019)

HS CODE 271012: Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "ASTM D 86 method" (excluding containing biodiesel)				
S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	Oman	897	US\$ 849 million (2)	5.0%
2.	India	849		
3.	UAE	726		
4.	Saudi Arabia	366		
5.	Singapore	281		

Sources: ITC Trade Map; WTO

India is a leading exporter globally of HS Code 271012, which includes products such as aviation turbine fuel (ATF), naphtha, petrol and kerosene; it was the sixth-largest source market with

exports worth US\$ 14,740 million in 2018. Its current ranking of 2 as a source market of this product category for South Africa reflects its global standing. Though South Africa has exhibited a slightly-negative imports' CAGR of -1% for 2015–19 for HS Code 271012, India should explore increasing its share of this product category's exports to South Africa given its global performance and existing share in the country's imports of this product.

In fact, India's exports of this product category to South Africa have declined during the period under consideration, highlighting the importance of focussed efforts to regain lost ground; India's exports were US\$ 1,301 million in 2015, US\$ 754 million in 2016, US\$ 888 million in 2017, US\$ 457 million in 2018 and US\$ 849 million in 2019. Moreover, India's ranking as the second-largest source country for HS Code 271012 for South Africa is all the more noteworthy given the existence of preferential tariffs extended to free-trade partners at the rate of 0% for the Southern African Customs Union (SACU), 4.23% for the European Commission (EC) and 0% for the Southern Africa Development Community (SADC).

Globally, in 2018, India's exports of HS Code 271012 were largely shipped to the UAE (US\$ 4,776 million in 2018), China (US\$ 2,375 million in 2018) and the US (US\$ 2,319 million in 2018). *See list of importers of HS Code 271012 in Annexure 2.*

(for 2019)

HS CODE 851762: Machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus (excluding telephone sets, telephones for cellular networks or for other wireless networks)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> <i>(rank)</i>	<u>TARIFF</u>
1.	China	524.8	US\$ 179.9 million (3)	0.0%
2.	Vietnam	349.5		
3.	India	179.9		
4.	USA	58.2		
5.	Malaysia	55.1		

Sources: ITC Trade Map; WTO

India's exports of HS Code 851762 to South Africa during the period 2015 to 2019 swung to a low point before increasing exponentially — exports registered a steep fall from US\$ 22.6 million in 2015 to US\$ 5.5 million in 2016, rose to US\$ 11.7 million in 2017 and then surged emphatically to US\$ 125.5 million in 2018 and US\$ 179.9 million in 2019. Therefore, given the encouraging surge and prevalence of a very strong imports' CAGR of 15%, there appears to be potential for further growth in India's exports of this product category to South Africa. Moreover, the absence of preferential tariffs for free-trade partner countries provides a level-playing field. While ranked fairly low at 28 globally, Indian exports have also shown some potential on the world stage, with exports rising steadily from US\$ 168 million (2015), US\$ 182 million (2016), US\$ 423 million (2017) and US\$ 627 million (2018). *See list of importers of HS Code 851762 in Annexure 3.*

(for 2019)

HS CODE 300490: Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes, put up in measured doses "incl. those in the form of transdermal administration" or in forms or packings for retail sale (excluding medicaments containing antibiotics, medicaments containing hormones or steroids used as hormones, but not containing antibiotics, medicaments containing alkaloids or derivatives thereof but not containing hormones or antibiotics and medicaments containing provitamins, vitamins or derivatives thereof used as vitamins)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	India	444	US\$ 444 million (1)	0.0%
2.	Germany	151		
3.	USA	120		
4.	France	113		
5.	Italy	68.5		

Sources: ITC Trade Map; WTO

A strong player in this product category, India is a leading exporter of HS Code 300490 to both South Africa and the world (global ranking of 10 with exports worth US\$ 10,742 million in 2018). On the imports' CAGR side, while South Africa exhibited a rather low, tepid CAGR of 1% for the period 2015 to 2019, this product category is likely to see continuing exports' growth for Indian companies in this segment. India completely dominates its imports of this product category; therefore, the only takeaway for the moment is that India should maintain its leadership position going forward. *See list of importers of HS Code 300490 in Annexure 4.*

(for 2019)

HS CODE 851712: Telephones for cellular networks "mobile telephones" or for other wireless networks

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	China	994	US\$ 0.6 million (11)	0.0%
2.	Hong Kong, China	67.3		
3.	Viet Nam	29.9		
4.	Korea, Republic of	6.4		
5.	United Kingdom	3.9		

Sources: ITC Trade Map; WTO

From all perspectives, HS Code 851712 does not hold potential for exports by Indian firms to South Africa. Though India is ranked as the 11th-largest source country for this product category for South Africa, a highly-negative imports' CAGR of -14% for the period 2015–19 and minuscule value of exports during this period render this category unattractive for exports. India's exports of HS Code 851712 to South Africa were US\$ 23,000 in 2015, US\$ 1.7 million in 2016, US\$ 14,000 in 2017, US\$ 0.2 million in 2018 and US\$ 0.6 million in 2019. India is not a strong exporting country of electronics products and this is reflected in its paltry exports of HS Code 851712 to South Africa.

Globally, India is ranked 16 with exports worth US\$ 1,065 million in 2018. *See list of importers of HS Code 851712 in Annexure 5.*

(for 2019)

HS CODE 490700: Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title

S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	United Kingdom	853.9	–	5.0%
2.	Switzerland	95.6		
3.	South Africa	89.7		
4.	Zambia	24.6		
5.	Zimbabwe	17.7		

Sources: ITC Trade Map; WTO

The highest CAGR in South Africa's imports' basket is exhibited by this product category at 238% for the period 2015 to 2019; however, India had next-to-nothing exports of this category at US\$ 10,000 in 2019. Moreover, South Africa levies an average MFN tariff of 5.0% on the imports of HS Code 490700; preferential tariffs extended to free-trade partners at the rate of 0% for SACU, EC, EFTA and SADC countries. Therefore, in spite of a stupendously-high imports' CAGR, there appears to be limited scope for increasing India's exports of this product category to South Africa given the last-recorded export value and the presence of preferential tariffs. Globally, India is ranked 12, with exports worth US\$ 18 million in 2019. *See list of importers of HS Code 490700 in Annexure 6.*

(for 2019)

HS CODE 870322: Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity > 1.000 cm³ but <= 1.500 cm³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	India	490	US\$ 490 million (1)	23.3%
2.	Germany	121		
3.	Thailand	80.1		
4.	Indonesia	75.0		
5.	China	66.9		

Sources: ITC Trade Map; WTO

A negative imports' CAGR of -1% for 2015–19 notwithstanding, this product category is significant for Indian exports given the substantial lead and top ranking achieved by India. This is in spite of an average MFN tariff of 23.3% and preferential tariffs for free-trade partner countries, which discourages imports from India.

However, for HS Code 870322, most top-ranking countries are not free-trade partner countries, which highlights the limited comparative advantage of the free-trade partner countries in this product category. Preferential tariffs extended are 0% (SACU and SADC countries), 12% (EC

countries) and 16.67% (EFTA countries). Globally, India is ranked 15 with exports worth US\$ 3,066 million in 2019. *See list of importers of HS Code 870322 in Annexure 7.*

(for 2019)

HS CODE 870323: Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity > 1.500 cm³ but <= 3.000 cm³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	Germany	437	US\$ 84.4 million (3)	23.3%
2.	Japan	312		
3.	India	84.4		
4.	Czech Republic	72.5		
5.	Slovakia	32.0		

Sources: ITC Trade Map; WTO

Once again, though HS Code 870323 had a negative imports' CAGR of -1% and an average MFN tariff of 23.3%, this product category holds potential for growth in exports from India because of the ranking of third-largest source country and the significant gap between India and the top two source countries. India's exports of HS Code 870323 to South Africa have been exhibiting ups-and-downs, from US\$ 11.6 million in 2015 to US\$ 6.6 million in 2016, US\$ 69.4 million in 2017, US\$ 47.3 million in 2018 and US\$ 84.4 million in 2019. Therefore, focussed efforts by Indian industry should be undertaken to achieve a steady increase in exports and to bridge the gap with the top sourcing countries. The preferential tariffs extended by South Africa to its free-trade partners are 0% (SACU and SADC countries), 12% (EC countries) and 16.67% (EFTA countries). Globally, India ranked 23 in 2018, with exports worth US\$ 1,939 million in that year. *See list of importers of HS Code 870323 in Annexure 7.*

(for 2019)

HS CODE 847130: Data-processing machines, automatic, portable, weighing <= 10 kg, consisting of at least a central processing unit, a keyboard and a display (excluding peripheral units)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	China	785	US\$ 0.3 million (14)	0.0%
2.	Vietnam	16.8		
3.	USA	4.2		
4.	United Kingdom	3.2		
5.	Taipei, Chinese	3.1		

Sources: ITC Trade Map; WTO

South Africa had a negative imports' CAGR of -1% for the period 2015 to 2019 for this product category. India ranked 14 as a source market for South Africa for HS Code 847130, but had a very low volume of exports; in fact, India's exports of this product category to South Africa have largely been inconsequential, ranging from US\$ 8,000 in 2015 to US\$ 0.3 million in 2019. Even on the global level, India's exports of this product category are very low; India ranked 38 with

exports worth US\$ 38 million in 2019. There is, therefore, no potential at the moment for pursuing export projects for this product category to South Africa. *See list of importers of HS Code 847130 in Annexure 8.*

(for 2019)

HS CODE 847150: Processing units for automatic data-processing machines, whether or not containing in the same housing one or two of the following types of unit: storage units, input units, output units (excluding those of heading 8471.41 or 8471.49 and excluding peripheral units)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	China	165	US\$ 0.2 million (24)	0.0%
2.	Poland	107		
3.	Czech Republic	89.1		
4.	USA	68.4		
5.	Germany	50.4		

Sources: ITC Trade Map; WTO

Though South Africa has a very robust imports' CAGR of 18% for 2015–19, this product category does not hold export potential for India given the current low rank and value of exports, both to South Africa and globally (rank 33 with exports worth US\$ 46 million in 2019). In fact, the highest value achieved by India has been US\$ 0.2 million in 2019; India exported minuscule values of HS Code 847150 to South Africa in the previous years, at US\$ 40,000 in 2015, US\$ 0.1 million in 2016 and 2017, and US\$ 36,000 in 2018. Given the overall, abysmally-low export numbers, there is little or no potential to increase exports of this product category to South Africa. *See list of importers of HS Code 847150 in Annexure 8.*

(for 2019)

HS CODE 880240: Aeroplanes and other powered aircraft of an of an unladen weight > 15000 kg (excluding helicopters and dirigibles)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	USA	403	–	0.0%
2.	France	35.5		
3.	Mauritius	35.2		
4.	UAE	30.6		
5.	Ireland	29.8		

Sources: ITC Trade Map; WTO

Even though South Africa has a steady imports' CAGR of 8% for HS Code 880240 for 2015–19, there is little scope for India to export aeroplanes and other powered aircraft for the reason that there is no indigenous manufacturing of this product category in India, save for some military aircraft that is produced by HAL. *See list of importers of HS Code 880240 in Annexure 9.*

(for 2019)

HS CODE 870332: Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with compression-ignition internal combustion piston engine "diesel or semi-

diesel engine" of a cylinder capacity > 1.500 cm³ but <= 2.500 cm³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	Germany	244	US\$ 12.3 million (9)	23.3%
2.	Spain	94.4		
3.	Korea	37.3		
4.	United Kingdom	28.4		
5.	Mexico	16.9		

Sources: ITC Trade Map; WTO

India's exports of other products under Chapter 87 (HS codes 870322 and 870323) have performed better as compared to the exports of HS Code 870332, for which India is the ninth-largest source country for South Africa. With a negative imports' CAGR of -4% and levy of average MFN tariff of 23.3%, there would appear to be very limited scope for increasing exports of this product category to South Africa. However, there appears to be some potential for increasing exports in this product category largely because of the values achieved during the period under consideration; India's exports were US\$ 13.4 million in 2015, US\$ 17.1 million in 2016, US\$ 27 million in 2017, US\$ 25.9 million in 2018, before falling to the lowest level in these five years, to US\$ 12.3 million in 2019. Therefore, further analysis to ascertain reasons for the decline needs to be undertaken, but this also emphasises the fact that there is potential for larger volume of exports than last achieved, bridging the gap with top sourcing countries. The preferential tariffs extended by South Africa to its free-trade partners are 0% (SACU and SADC countries), 12% (EC countries) and 16.67% (EFTA countries). Globally, India is ranked low at 29 with exports worth US\$ 215 million in 2019. See *list of importers of HS Code 870332 in Annexure 7*.

(for 2019)

HS CODE 281820: Aluminium oxide (excluding artificial corundum)

S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	Australia	488	US\$ 0.31 million (10)	0.0%
2.	China	3.6		
3.	Germany	3.2		
4.	USA	2.9		
5.	France	2.4		

Sources: ITC Trade Map; WTO

This is a product category in which India's global performance as a source country is encouraging and which holds out scope for improving exports vis-à-vis South Africa. With a steady imports' CAGR of 3% for 2015–19 and average MFN tariff of 0%, Indian industry should undertake focussed projects to increase exports of HS Code 281820 to South Africa. India's exports of this product category to South Africa during the period under consideration have maintained a level, at US\$ 0.39 million in 2015, US\$ 0.43 million in 2016, US\$ 0.34 million in 2017, US\$ 0.40 million in 2018 and US\$ 0.31 million in 2019. While the export numbers are not significant in themselves, they do hold out potential for growth, especially given India's

global ranking as the sixth-largest source country for this product category with exports worth US\$ 493 million in 2019. *See list of importers of HS Code 281820 in Annexure 10.*

(for 2019)

HS CODE 870321: Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity $\leq 1.000 \text{ cm}^3$ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> (US\$ million)	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	India	123.8	US\$ 123.8 million (1)	10.0%
2.	Romania	116.9		
3.	Spain	75.5		
4.	Germany	69.7		
5.	France	49.0		

Sources: ITC Trade Map; WTO

In spite of the prevalence of preferential tariffs for free-trade partner countries, India is the top-ranking source country for HS Code 870321 for South Africa. In fact, India's exports of this product category have, by-and-large, registered a steady increase during the period 2015 to 2019 — US\$ 37.3 million in 2015, US\$ 30 million in 2016, US\$ 75.8 million in 2017, US\$ 122.8 million in 2018 and US\$ 123.8 million in 2019. Therefore, the levy of an average MFN tariff of 10.0% does not appear to have discouraged imports from India. With a robust imports' CAGR of 6% for 2015–19, there is enough incentive to continue focusing on this product category in South Africa with the objective of maintaining and strengthening India's leadership position. The preferential tariffs extended by South Africa to its free-trade partners are 0% for SACU, SADC, EC and EFTA countries. Globally, too, India is ranked high as the ninth-largest exporter of HS Code 870321, with exports worth US\$ 1,515 million in 2019. *See list of importers of HS Code 870321 in Annexure 7.*

(for 2019)

HS CODE 710231: Non-industrial diamonds unworked or simply sawn, cleaved or bruted (excluding industrial diamonds)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> (US\$ million)	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	Botswana	124	—	0.0%
2.	Namibia	30.7		
3.	Angola	13.7		
4.	South Africa	9.9		
5.	Russia	4.4		

Sources: ITC Trade Map; WTO

While India ranks fairly high as the seventh-largest exporter of HS Code 710231 globally, it does not feature as a source country for South Africa. This is in spite of a strong imports' CAGR of 10% and the levy of an average MFN tariff of 0.0%. Therefore, further analysis to ascertain reasons for India's absence in the South Africa import market for this product category could be

undertaken. India's global exports of HS Code 710231 were US\$ 1,307 million in 2015, US\$ 1,575 million in 2016, US\$ 1,763 million in 2017, US\$ 1,394 million in 2018 and US\$ 1,214 million in 2019, largely to countries such as Belgium (US\$ 658 million), the UAE (US\$ 275 million), Singapore (US\$ 107 million) and Hong Kong (US\$ 72.2 million). *See list of importers of HS Code 710231 in Annexure 11.*

(for 2019)

HS CODE 330210: Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, with a basis of one or more of these substances, of a kind used in the food and drink industries; other preparations based on odoriferous substances, of a kind used for the manufacture of beverages

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> (US\$ million)	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	Eswatini	352	US\$ 1.1 million (13)	0.0%
2.	Germany	24.8		
3.	Switzerland	20.1		
4.	USA	14.3		
5.	Italy	9.6		

Sources: ITC Trade Map; WTO

The landlocked, Southern African country of Eswatini is the top-ranking source country for South African imports of HS Code 330210. India has limited exports of this product category to South Africa and these have maintained a level during the period under consideration, with exports at US\$ 1.3 million in 2015, US\$ 1.6 million in 2016, US\$ 1.4 million in 2017 and 2018, and US\$ 1.1 million in 2019. South Africa exhibited a healthy imports' CAGR of 5% for 2015–19, and Indian companies in this sector can look at garnering a larger share of the country's imports of this product category given the import demand and substantial lead maintained by the top-ranking source country. Globally, India is ranked no. 20 with exports worth US\$ 74 million in 2019. *See list of importers of HS Code 330210 in Annexure 12.*

(for 2019)

HS CODE 100630: Semi-milled or wholly milled rice, whether or not polished or glazed

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> (US\$ million)	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	Thailand	311	US\$ 98 million (2)	0.0%
2.	India	98		
3.	Pakistan	7.0		
4.	China	4.0		
5.	Vietnam	2.8		

Sources: ITC Trade Map; WTO

The potential here, in spite of an imports' CAGR of 0% for 2015–19, is closing the gap maintained by the top-ranking source country. In fact, India's exports of this product category to South Africa have declined during the period under consideration; India exported US\$ 133 million in 2015, which declined to US\$ 111 million in 2016, increasing to US\$ 119 million in 2017 and US\$ 130 million in 2018, before again declining in 2019 to US\$ 98 million. From the global perspective, too, there is immense potential as India is ranked as the no. 1 exporter of HS

Code 100630 with exports worth US\$ 6,909 million in 2019. Therefore, notwithstanding an unimpressive imports' CAGR, the potential for exports of HS Code 100630 to South Africa is in bridging the gap with the top-ranking source country. *See list of importers of HS Code 100630 in Annexure 13.*

(for 2019)

HS CODE 851770: Parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus for the transmission or reception of voice, images or other data, n.e.s.

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	China	353	US\$ 2.4 million (6)	0.0%
2.	Italy	8.0		
3.	Germany	5.8		
4.	Vietnam	5.5		
5.	Hong Kong, China	3.8		

Sources: ITC Trade Map; WTO

India's exports of HS Code 851770 to South Africa depict a slowly-increasing trend during the period under consideration, from US\$ 0.6 million in 2015 to US\$ 1.1 million in 2017 and US\$ 2.4 million in 2019. India ranks high as the sixth-largest source country for HS Code 851770 for South Africa, though none of the top source countries come close to the top-ranking source country, China — the vast gap almost renders imports from other countries irrelevant. However, given the low-but-steady import demand for this product category with a CAGR of 2% for 2015–19, there is some scope for Indian industry to increase exports of HS Code 851770 to South Africa. Globally, India is ranked much lower as an exporter at 25, though here too, India's exports of HS Code 851770 increased from US\$ 33 million in 2015 to US\$ 232 million in 2018. *See list of importers of HS Code 851770 in Annexure 14.*

(for 2019)

HS CODE 100199: Wheat and meslin (excluding seed for sowing, and durum wheat)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> <i>(US\$ million)</i>	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	Germany	111	–	14.40% inside-quota tariff; 26.87% duty applicable over TRQ; TRQ quantity limit = 1,08,279 tonnes
2.	Russia	99.3		
3.	Lithuania	59.0		
4.	USA	33.3		
5.	Czech Republic	21.9		

Sources: ITC Trade Map

Though India is the second-largest wheat producing country in the world, domestic requirements mean low exports; therefore, India does not figure as a source country for HS Code 100199 for South Africa. In any case, a negative imports' CAGR of -5% for 2015–19 renders exports of this product category unattractive. Also, South Africa imposes a tariff-rate quota (TRQ) on HS Code 100199, from which only SACU and SADC countries are exempt with a duty of 0% for these two blocs. Every other country is levied a duty at the rate of 14.40% within the TRQ quantity limit and 26.87% is applicable over the limit. From the table above, it is clear that none of the

SACU and SADC countries feature as top source countries in spite of the preferential tariff. India is not an exporter of this product category at the global level either, with a rank of 30 in 2018; India's global exports of HS Code 100199 fell from US\$ 152 million in 2015 to US\$ 46 million in 2018. Therefore, India does not appear to have the potential to increase exports of this product category to South Africa. *See list of importers of HS Code 100199 in Annexure 15.*

(for 2019)

HS CODE 901890: Instruments and appliances used in medical, surgical or veterinary sciences, n.e.s.				
S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	USA	107	US\$ 7.3 million (13)	0.0%
2.	Germany	51.7		
3.	China	33.1		
4.	Mexico	25.0		
5.	Japan	20.4		

Sources: ITC Trade Map; WTO

South Africa exhibited a steady imports' CAGR of 4% for the period 2015 to 2019 and though India is not currently a top-ranking source country for this product category for South Africa, India's exports have largely maintained a growing trend during the period under consideration — exports were US\$ 3.7 million in 2015, US\$ 6.3 million in 2016, US\$ 6.8 million in 2017, US\$ 8.1 million in 2018 and US\$ 7.3 million in 2019. Therefore, focussed efforts towards increasing exports can be undertaken by Indian firms to tap into the import demand for this product category in South Africa. Globally, India is ranked much lower at 27 with exports worth US\$ 286 million in 2019. Here, too, India's exports have grown steadily with exports at US\$ 211 million in 2015, US\$ 186 million in 2016, US\$ 190 million in 2017, US\$ 210 million in 2018 and US\$ 286 million in 2019. *See list of importers of HS Code 901890 in Annexure 16.*

(for 2019)

HS CODE 843149: Parts of machinery of heading 8426, 8429 and 8430, n.e.s.				
S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	USA	80.1	US\$ 4.4 million (16)	5.0%
2.	China	72.1		
3.	Germany	35.4		
4.	Italy	29.0		
5.	Japan	26.4		

Sources: ITC Trade Map; WTO

Though HS Code 843149 exhibited an extremely tepid imports' CAGR of 1% for 2015–19 and South Africa free-trade partner countries have the benefit of a preferential tariff, this product category offers some limited scope for India if the trend of the last five years is taken into account. India's exports of this product category to South Africa have shown a slow and steady increase, at US\$ 1.8 million in 2015, US\$ 1.3 million in 2016, US\$ 2.9 million in 2017, US\$ 4 million in 2018 and US\$ 4.4 million in 2019. Therefore, once again, focussed projects by Indian firms could result in increasing exports of HS Code 843149 to South Africa. The preferential

tariffs extended by South Africa to its free-trade partners are 0% for SACU, EC, EFTA and SADC countries, and 2.5% for MERCOSUR countries. Globally, too, India is somewhat-similarly ranked at 18 with exports worth US\$ 385 million in 2019; here, again, India's exports have, by-and-large, exhibited an increasing trend. *See list of importers of HS Code 843149 in Annexure 17.*

(for 2019)

HS CODE 844399: Parts and accessories of printers, copying machines and facsimile machines, n.e.s. (excluding of printing machinery used for printing by means of plates, cylinders and other printing components of heading 8442)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> (US\$ million)	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	China	119	US\$ 0.1 million (36)	0.0%
2.	Japan	112		
3.	Malaysia	27.1		
4.	Singapore	13.8		
5.	USA	13.0		

Sources: ITC Trade Map; WTO

A negative imports' CAGR of -5% for 2015–19 renders this product category unattractive for exports. Moreover, India's exports of HS Code 844399 to South Africa have shown a declining trend during the period under consideration, from US\$ 1.8 million in 2015 to US\$ 0.4 million in 2017 and further down to US\$ 0.1 million in 2019. Therefore, keeping in view the negative import demand and falling exports from India, there appears to be no potential for Indian industry to pursue export projects for this product category. Additionally, there is very little scope for exports in this category increasing given India's low ranking globally at 40 (US\$ 36 million in 2019). *See list of importers of HS Code 844399 in Annexure 18.*

(for 2019)

HS CODE 870421: Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705)

<u>S. No.</u>	<u>COUNTRY</u>	<u>VALUE OF EXPORTS</u> (US\$ million)	<u>INDIA'S EXPORTS</u> (rank)	<u>TARIFF</u>
1.	Argentina	68.5	US\$ 9.9 million (10)	13.1%
2.	Portugal	51.4		
3.	Germany	46.1		
4.	Thailand	37.2		
5.	Japan	35.8		

Sources: ITC Trade Map; WTO

From all perspectives, the import market for HS Code 870421 in South Africa is unattractive given a negative imports' CAGR of -6% for 2015–19 and the applicability of a preferential tariff rate for free-trade partner countries. Though India is ranked as the 10th-largest source country for HS Code 870421 for South Africa, India's exports have declined substantially during the period under consideration, from US\$ 22.1 million in 2015 to US\$ 21.4 million in 2018, followed

by a steep fall to US\$ 9.9 million in 2019. The preferential tariffs extended by South Africa to its free-trade partners are 0% for SACU and SADC countries, 8.88% for EC countries and 10% for EFTA countries. Globally, India was ranked no. 21 with exports worth US\$ 219 million in 2019. *See list of importers of HS Code 870421 in Annexure 19.*

(for 2019)

HS CODE 740811: Wire of refined copper, with a maximum cross-sectional dimension of > 6 mm				
S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	Russia	157	US\$ 1.9 million (12) in 2018	0.0%
2.	UAE	93.3		
3.	Belgium	51.2		
4.	Zambia	18.4		
5.	Germany	13.3		

Sources: ITC Trade Map; WTO

Though South Africa has a steady imports' CAGR of 5% for HS Code 740811 for 2015–19, India has never had substantial exports of this product category to South Africa; for instance, India's exports of HS Code 740811 were a paltry US\$ 0.3 million in 2015, US\$ 67,000 in 2016, nil in 2017, US\$ 1.9 million in 2018 and a mere US\$ 1,000 in 2019. Therefore, in spite of steady import demand, India's export performance has been sketchy and, hence, there is no scope for India to increase exports of this category to South Africa. Globally, India ranks 31 with exports of US\$ 15.9 million in 2019.

(for 2019)

HS CODE 850440: Static converters				
S. No.	COUNTRY	VALUE OF EXPORTS (US\$ million)	INDIA'S EXPORTS (rank)	TARIFF
1.	China	173	US\$ 25.5 million (2)	0.0%
2.	India	25.5		
3.	Germany	19.9		
4.	USA	17.4		
5.	Italy	11.0		

Sources: ITC Trade Map; WTO

India is the second-largest source country for this product category, so even though HS Code 850440 exhibited a slightly-negative imports' CAGR of -1% for 2015 to 2019, there is scope for Indian industry to increase exports and garner a larger share of this import pie. The gap with the top sourcing country is substantial and, therefore, while import demand has registered de-growth, there is adequate scope by way of bridging the gap with the top sourcing country. In fact, India's exports of this product category to South Africa have fluctuated significantly during the period under consideration; exports were US\$ 13.4 million in 2015, US\$ 5.2 million in 2016, US\$ 5.9 million in 2017, US\$ 7.7 million in 2018, and then increasing sharply to US\$ 25.5 million in 2019. Globally, India is ranked as the 11th-largest exporter of this product category, with exports worth US\$ 1,148 million in 2019. *See list of importers of HS Code 850440 in Annexure 20.*

3. Balance of Trade, Product-Wise

Analysing the balance of trade (BoT) indicates the attractiveness of a market from the perspective of participation in trade fairs. For the purposes of this report, the BoT is calculated at the product level, rather than for the country per se; such an analysis indicates if a particular product is being imported for domestic consumption, or whether it is being imported to enable re-exports after either value-addition or to take advantage of FTAs.

Typically, a market with a negative BoT is one where the product is consumed domestically and, hence, Indian companies should attend B2C trade fairs in South Africa for these products; on the other hand, attendance in B2B trade fairs is recommended for products wherein South Africa has a positive BoT. The BoT for the top 25 products imported by South Africa is as follows:

TABLE 3: BALANCE OF TRADE FOR TOP IMPORTS OF SOUTH AFRICA (in US\$ '000)

S. No.	HS CODES	PRODUCT	BALANCE OF TRADE IN 2019
1.	270900	Petroleum oils and oils obtained from bituminous minerals, crude	-88,39,373
2.	271012	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "ASTM D 86 method" (excluding containing biodiesel)	-15,38,466
3.	851762	Machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus (excluding telephone sets, telephones for cellular networks or for other wireless networks)	-13,51,735
4.	300490	Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes, put up in measured doses "incl. those in the form of transdermal administration" or in forms or packings for retail sale (excluding medicaments containing antibiotics, medicaments containing hormones or steroids used as hormones, but not containing antibiotics, medicaments containing alkaloids or derivatives thereof but not containing hormones or antibiotics and medicaments containing provitamins, vitamins or derivatives thereof used as vitamins)	-10,70,509
5.	851712	Telephones for cellular networks "mobile telephones" or for other wireless networks	-10,60,357
6.	490700	Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title	-11,30,248
7.	870322	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity $>$ 1.000 cm ³ but \leq 1.500 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)	-10,49,361
8.	870323	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity $>$ 1.500 cm ³ but \leq 3.000 cm ³ (excluding vehicles	3,71,969

S. No.	HS CODES	PRODUCT	BALANCE OF TRADE IN 2019
		for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)	
9.	847130	Data-processing machines, automatic, portable, weighing <= 10 kg, consisting of at least a central processing unit, a keyboard and a display (excluding peripheral units)	-7,58,446
10.	847150	Processing units for automatic data-processing machines, whether or not containing in the same housing one or two of the following types of unit: storage units, input units, output units (excluding those of heading 8471.41 or 8471.49 and excluding peripheral units)	-5,67,833
11.	880240	Aeroplanes and other powered aircraft of an of an unladen weight > 15000 kg (excluding helicopters and dirigibles)	-5,01,147
12.	870332	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a cylinder capacity > 1.500 cm ³ but <= 2.500 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)	16,89,818
13.	281820	Aluminium oxide (excluding artificial corundum)	-5,01,839
14.	870321	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)	8,97,804
15.	710231	Non-industrial diamonds unworked or simply sawn, cleaved or bruted (excluding industrial diamonds)	5,96,455
16.	330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, with a basis of one or more of these substances, of a kind used in the food and drink industries; other preparations based on odoriferous substances, of a kind used for the manufacture of beverages	-3,99,306
17.	100630	Semi-milled or wholly milled rice, whether or not polished or glazed	-3,81,173
18.	851770	Parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus for the transmission or reception of voice, images or other data, n.e.s.	-3,75,925
19.	100199	Wheat and meslin (excluding seed for sowing, and durum wheat)	-3,51,481
20.	901890	Instruments and appliances used in medical, surgical or veterinary sciences, n.e.s.	-3,13,540
21.	843149	Parts of machinery of heading 8426, 8429 and 8430, n.e.s.	-1,57,127
22.	844399	Parts and accessories of printers, copying machines and facsimile machines, n.e.s. (excluding of printing machinery used for printing by means of plates, cylinders and other printing components of heading 8442)	-3,09,594
23.	870421	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705)	28,61,324
24.	740811	Wire of refined copper, with a maximum cross-sectional dimension of > 6 mm	-3,40,068
25.	850440	Static converters	-2,93,356

Source: ITC Trade Map

If products with a positive BoT are excluded, of the top 25 products imported by South Africa, there are 20 products that exhibit a negative BoT and, hence, are target for exports by Indian businesses. The table below highlights the product categories that are either already top export items for India, or, those that have the potential for exports going forward, considering imports' CAGR, India's rank as a source country for South Africa, India's ranking globally and potential thereof. In some instances, there is potential in spite of a de-growth in import demand from the perspective of garnering a larger share of the import pie of that product category.

TABLE 4: PRODUCTS WITH MOST POTENTIAL FOR INDIA'S EXPORTS TO SOUTH AFRICA

S. No.	HS CODES	NEGATIVE BALANCE OF TRADE IN 2019 (in US\$ '000)	IMPORTS CAGR (%)	INDIA'S RANK AS EXPORT SOURCE
1.	270900	-88,39,373	3%	2
2.	271012	-15,38,466	-1%	2
3.	851762	-13,51,735	15%	3
4.	300490	-10,70,509	1%	1
5.	851712	-10,60,357	-14%	11
6.	490700	-11,30,248	238%	-
7.	870322	-10,49,361	-1%	1
8.	847130	-7,58,446	-1%	14
9.	847150	-5,67,833	18%	24
10.	880240	-5,01,147	8%	-
11.	281820	-5,01,839	3%	10
12.	330210	-3,99,306	5%	13
13.	100630	-3,81,173	0%	2
14.	851770	-3,75,925	2%	6
15.	100199	-3,51,481	-5%	-
16.	901890	-3,13,540	4%	13
17.	843149	-1,57,127	1%	16
18.	844399	-3,09,594	-5%	36
19.	740811	-3,40,068	5%	12
20.	850440	-2,93,356	-1%	2

Source: ITC Trade Map, MFS Analysis

From the analysis above, there are 11 products — 271012, 851762, 300490, 870322, 281820, 330210, 100630, 851770, 901890, 843149 and 850440 — that have export potential for the South African market. Some of these product categories, as said before, have exhibited negative imports' CAGR for the period under consideration, or, have a preferential tariff regime where imports from India lose out; however, India is either already a strong exporter of these categories to South Africa, or, has the potential given its global exports. It is for Indian industry to explore these options and focus on specific export projects to derive and cultivate a market.

4. National Tariff Lines

Each product category contains several sub-categories that are defined at the national tariff line (NTL), which can start at the 8-digit level and go on to 12 digits. The table below lists the NTLs,

where available, for South Africa's top imports. This listing is included to provide greater insight into the micro-composition of South Africa's imports and to enable customizations at the factory level.

TABLE 5: NATIONAL TARIFF LINES

HS CODE 271012: Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "ASTM D 86 method" (excluding containing biodiesel)			
S. No.	NTL CODE	DESCRIPTION	IMPORTS IN 2019 (in US\$)
1.	27101201	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): aviation spirit, as defined in additional note 1(a)	14 million
2.	27101202	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): petrol, as defined in additional note 1(b)	727 million
3.	27101207	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): aviation kerosene, as defined in additional note 1(d)	231 million
4.	27101230	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): distillate fuel, as defined in additional note 1(g)	3,075 million
5.	27101235	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): residual fuel oils, as defined in additional note 1(h)	57 million
6.	27101239	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): specified aliphatic hydrocarbons solvents, as defined in additional note 1(ij), unmarked	1.6 million
7.	27101240	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): white spirits, as defined in additional note 1(k)	3,62,000
8.	27101245	Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): mixed alkylenes	3,40,000

9.	27101247	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): lubricating grease	11 million
10.	27101249	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): prepared lubricating oils, in containers holding less than 5 litres	2.9 million
11.	27101252	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): other prepared lubricating oils	26 million
12.	27101255	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): base oils for prepared lubricating oil, manufactured by the refining of used lubricating oil or other used oil	2 million
13.	27101257	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): other base oils for prepared lubricating oil	179 million
14.	27101260	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): transformer oil and cable oil	11 million
15.	27101280	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): hydraulic transmission fluids	3.1 million
16.	27101290	Light oils and preparations, of petroleum or bituminous minerals which \geq 90% by volume "incl. losses" distil at 210°C "astm d 86 method" (excluding containing biodiesel): other	89.5 million

HS CODE 851762: Machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus (excluding telephone sets, telephones for cellular networks or for other wireless networks)

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	85176210	Machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus (excluding telephone sets, telephones for cellular networks or for other wireless networks): videophones	3.8 million
2.	85176220	Machines for the reception, conversion and transmission or regeneration of voice, images or	613 million

		other data, incl. switching and routing apparatus (excluding telephone sets, telephones for cellular networks or for other wireless networks): apparatus designed for use when carried in the hand or on the person	
3.	85176290	Machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus (excluding telephone sets, telephones for cellular networks or for other wireless networks): other	818 million

HS CODE 300490: Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes, put up in measured doses "incl. those in the form of transdermal administration" or in forms or packings for retail sale (excluding medicaments containing antibiotics, medicaments containing hormones or steroids used as hormones, but not containing antibiotics, medicaments containing alkaloids or derivatives thereof but not containing hormones or antibiotics and medicaments containing provitamins, vitamins or derivatives thereof used as vitamins)

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	30049010	Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes, put up in measured doses "incl. those in the form of transdermal administration" or in forms or packings for retail sale (excluding medicaments containing antibiotics, medicaments containing hormones or steroids used as hormones, but not containing antibiotics, medicaments containing alkaloids or derivatives thereof but not containing hormones or antibiotics and medicaments containing provitamins, vitamins or derivatives thereof used as vitamins): in aerosol containers	9 million
2.	30049090	Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes, put up in measured doses "incl. those in the form of transdermal administration" or in forms or packings for retail sale (excluding medicaments containing antibiotics, medicaments containing hormones or steroids used as hormones, but not containing antibiotics, medicaments containing alkaloids or derivatives thereof but not containing hormones or antibiotics and medicaments containing provitamins, vitamins or derivatives thereof used as vitamins): other	1,375 million

HS CODE 851712: Telephones for cellular networks "mobile telephones" or for other wireless networks

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	85171210	Telephones for cellular networks "mobile telephones" or for other wireless networks: designed for use when carried in the hand or on the person	1,119 million

2.	85171290	Telephones for cellular networks "mobile telephones" or for other wireless networks: other	13.3 million
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HS CODE 490700: Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	49070010	Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title: postage stamps, revenue stamps and banknotes	1,121 million
2.	49070090	Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title: other	2,58,000

HS CODE 847130: Data-processing machines, automatic, portable, weighing <= 10 kg, consisting of at least a central processing unit, a keyboard and a display (excluding peripheral units)

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	84713010	Data-processing machines, automatic, portable, weighing <= 10 kg, consisting of at least a central processing unit, a keyboard and a display (excluding peripheral units): with a screen size exceeding 45 cm	1.7 million
2.	84713090	Data-processing machines, automatic, portable, weighing <= 10 kg, consisting of at least a central processing unit, a keyboard and a display (excluding peripheral units): other	585 million

HS CODE 870321: Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	87032123	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10): vehicles of the open body tubular frame type, with an engine capacity not exceeding 250 cm ³ and a vehicle mass not exceeding 250 kg	3,52,000
2.	87032160	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station	5.3 million

		wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10): vehicles with motorcycle-type handlebars and hand-operated controls	
3.	87032175	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10): other, with a vehicle mass exceeding 250 kg but not exceeding 800 kg	1 million
4.	87032190	Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm ³ (excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10): other	492 million

HS CODE 851770: Parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus for the transmission or reception of voice, images or other data, n.e.s.

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	85177010	Parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus for the transmission or reception of voice, images or other data, n.e.s: for telephone sets	4.2 million
2.	85177090	Parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus for the transmission or reception of voice, images or other data, n.e.s: other	395 million

HS CODE 843149: Parts of machinery of heading 8426, 8429 and 8430, n.e.s.

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	84314960	Parts of machinery of heading 8426, 8429 and 8430, n.e.s: radiators	3.8 million
2.	84314990	Parts of machinery of heading 8426, 8429 and 8430, n.e.s: other	383 million

HS CODE 870421: Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705)

<u>S. No.</u>	<u>NTL CODE</u>	<u>DESCRIPTION</u>	<u>IMPORTS IN 2019 (in US\$)</u>
1.	87042110	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston	51,000

		engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705): shuttle cars for use in underground mines; low construction flame-proof vehicles, equipped with control mechanisms both in the front and at the rear, for use in underground mines	
2.	87042140	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705): off-the-road logging trucks	2,11,000
3.	87042170	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705): other, of a vehicle mass not exceeding 600 kg	4,65,000
4.	87042177	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705): other, with a vehicle mass exceeding 600kg but not exceeding 1100 kg	1.1 million
5.	87042181	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705): other, double-cab, of a vehicle mass not exceeding 2 000 kg or a g.v.m. not exceeding 3 500 kg, or of a mass not exceeding 1 600 kg or a g.v.m. not exceeding 3 500 kg per chassis fitted with a cab	156 million
6.	87042183	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705): other (excluding double-cab), of a vehicle mass not exceeding 2 000 kg or a g.v.m. not exceeding 3 500	104 million

		kg, or of a mass not exceeding 1 600 kg or a g.v.m. not exceeding 3 500 kg per chassis fitted with a cab	
7.	87042190	Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t (excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705): other	81 million

Source: ITC Trade Map

5. Trade Barriers

South Africa imposes non-tariff measures such as export subsidies, safeguards, tariff-rate quotas, anti-dumping, sanitary and phytosanitary measures and technical barriers to trade, in addition to licensing, Customs facilitation and price controls. Select imports to South Africa that are subject to sanitary and phytosanitary barriers include live animals and their meat; animal-derived products, such as meat and meat products; beef; maize seeds and grains, etc. In addition, select product imports subject to safeguards include certain flat-rolled products of iron, non-alloy steel or other alloy steel, threaded fasteners of iron or steel, etc., while those subject to export subsidies includes acids, oilseeds, milk powder, wheat and wheat products, other edible preparations, etc.

Anti-dumping measures are imposed on imports of products such as cement, garden picks, spades, shovels, rakes, forks, stainless steel sinks, float and flat glass, wire ropes, frozen chicken meat, garlic, unframed mirrors, wheelbarrows, polyethylene terephthalate (PET), gypsum plasterboard, PVC rigid, soda ash, etc. Imports of products such as barley, cheese, coffee, cotton, dried beans, eggs, vegetable preparations, etc., are subject to tariff-rate quotas, while TBTs are imposed on liquor products, pre-packaged foodstuffs, ice-cream and frozen desserts, etc.

A total of 227 barriers to trade are imposed by South Africa; these are all either in-force or initiated and are shown in a consolidated manner in the table below.

TABLE 6: TRADE BARRIERS IMPOSED BY SOUTH AFRICA AS OF DECEMBER 31, 2019

S. No.	TRADE BARRIER	PARTNER AFFECTED	NUMBER OF MEASURES	HS CODES IMPACTED
1.	Export subsidies	All members	62	0201, 0202, 0203, 0204, 020610, 020620, 020630, 020640, 0207, 021010, 021020, 021090, 0401, 0402, 0403, 0404, 0405, 0406, 0407, 0409, 0500, 0601, 0602, 0603, 0604, 0701, 0702, 0703, 0704, 0705, 0706, 0707, 0708, 0709, 0710, 0711, 0712, 0713, 0714, 0801, 0803, 0804, 0805, 0806, 0810, 0811, 0813, 0814,

				0901, 0902, 0904, 0905, 0907, 0909, 0910, 1001, 1003, 1004, 1007, 110220, 110290, 1101, 110311, 110312, 110313, 10321, 110329, 110411, 110412, 11041910, 110421, 110422, 110423, 11042910, 11071010, 11071020, 11071030, 11071040, 11072030, 11072040, 11072010, 11072020, 1109, 1201, 1203, 1204, 1205, 1206, 1207, 1209, 1300, 1501, 1502, 1503, 1504, 1505, 1506, 1510, 1516, 1517, 1519, 1520, 1601, 1602, 1603, 1701, 1702, 1703, 1704, 1800 1902, 1903, 1905, 2006, 2008, 2100, 2201, 2202, 2203, 2204, 2205, 2207, 2208, 2209, 2301, 230210, 230230, 2309, 2401, 2402, 2403, 3501, 3502, 3503, 3504, 3505, 4101, 4102, 4103, 4301, 5001, 5002, 5101, 5103 5201, 5202, 5203
2.	Safeguards	All members	3	720810, 720825, 720826, 720827, 720836, 720837, 720838, 720839, 720840, 720851, 720852, 729853, 720854, 720890, 721114, 721119, 722530, 722540, 722599, 722691, 722699, 73181539, 73181541, 73181542, 73181630
3.	Tariff-rate quotas	All members	53	0201, 0202, 0203, 0204, 0206, 0207, 0401, 0402, 0403, 0404, 0405, 040510, 040520, 04052000, 040590, 0406, 0407, 0408, 0701, 070521, 070529, 0708, 0710, 0712, 071320, 071331, 071332, 071333, 071339, 071340, 071390, 07141010, 07142010, 07149010, 080620, 0813, 0901, 0902 1001, 1002, 1003, 1004, 1005, 1007, 1008, 1101, 1102, 1103, 1104, 1107, 1108, 1201, 1202, 1204, 1205, 1206, 120921, 12122010, 1507, 1508, 1510, 1511, 1512, 1513, 1514, 1515 1701, 1702, 1703, 180690

				1901, 190110, 190120, 190190, 1902, 1903, 19042010, 2008, 20081100, 20081900, 20082000, 20083000, 20084000, 20085000, 20086000, 20087000, 20088000, 20089100, 20089200, 20089910, 20089920, 20089930, 20089940, 20089950, 20089990, 2106, 21061000, 21069010, 210690910, 210690915, 210690917, 210690920, 210690923, 210690925, 210690930, 210690935, 210690940, 210690945, 210690950, 210690955, 210690960, 210690990 2204, 2205, 2206, 2207, 2208, 22082000, 22083000, 22084000, 22085000, 22086000, 22087000, 22089000, 2209, 2303, 2304, 2305, 2306, 2401, 33021011, 33021012, 5201
4.	Sanitary and phytosanitary	All members	59	01, 0102, 0103, 0105, 0106, 02, 0201, 0202, 0203, 02031, 020311, 020312, 020319, 02032, 020321, 020322, 020329, 020622, 020641, 020680, 0207, 020734, 0208, 03, 0401, 0407, 0408, 05, 06, 0902, 10, 1001, 1002, 1003, 1004, 1005, 1006, 1007, 1008, 1201, 1202, 1205, 1206, 16, 2007, 200811, 2105, 22, 2201, 2202, 23, 4415, 90110 etc.
5.	Anti-dumping	Bilateral	34	02071, 02071490, 070320, 07129090, 20041090, 252329, 283620, 320740, 392049, 390760, 680911, 700490, 700529, 700991, 7009910, 731210, 732410, 82011010, 82013003, 82013090, 82019020, 871680
6.	Sanitary and phytosanitary	Bilateral	5	01, 0102, 0104, 0105, 01063, 02, 0207, 04, 0407
7.	Technical barriers to trade, specific trade concerns	Bilateral	10	0401, 0402, 0403, 0404, 0405, 0406, 08, 15, 1704, 1806, 1902, 1904, 1905, 190510, 190520, 19053, 190540, 190590, 2009, 2201, 2202, 3303, 3304, 3305, 3306, 3307, 3401, 3402, 3918,

				3924, 4419, 4803, 4818, 5007, 5111, 5112, 5113, 5208, 5209, 5210, 5211, 5212, 5309, 5311, 5407, 5408, 57, 5801, 5802, 5804, 5805, 5809, 5810, 60, 61, 62, 63, 6401, 6402, 6403, 6404, 6405, 6802, 6904, 6907, 6908, 6911, 6912, 7013, 7615, 8215, 8528, 8711, 8712, 91, 9403, 9404, 9503, 96
8.	Sanitary and phytosanitary, specific trade concern	Bilateral	1	0105, 0207

Source: WTO

The specific trade barriers relevant for India are the anti-dumping measures imposed on the imports of float and flat glass (HS Codes 700490 and 700529), polyethylene terephthalate (PET) (HS Codes 070320 and 07129090) and unframed glass mirrors (HS Code 700991). Further, it may be noted from the table above that there are non-tariff measures imposed by South Africa on imports of certain products that figure in the list of the top 25 products as identified in Section 2 of this report — these include HS Code 33021011 (food preparations) and HS Code 33021012 (wines and spirits).

6. Concluding Analysis

An analysis of the top 25 product imports by South Africa clearly reveals that its import basket is balanced with products such as fossil fuel products, electronics, motor vehicles, machinery and equipment, pharmaceuticals, aircraft, aluminium, copper, and food and agri products.

Additionally, unlike other countries profiled so far, the country's import profile has displayed some unique characteristics with substantial imports witnessed in product categories such as printing industry products, diamonds, and essential oils and perfumes. This is evidenced by the fact that 'unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title' figure in the top 25 imports of South Africa.

It is worthwhile to mention that when compared to Egypt, South Africa is not as tariff-heavy with tariffs levied on imports of only nine products out of the top 25 product imports. Also, South Africa, too, offers substantial leeway on tariffs for free-trade partners, viz., African countries and European Community (EC) countries; between its African and the EC free-trade partners, the leeway by way of preferential tariffs is significantly higher for the former through groupings like the Southern African Customs Union (SACU) and Southern Africa Development Community (SADC).

The trends analysis of South Africa's top 25 imports over the period 2015 to 2019 suggests a low imports' or negative imports' CAGR for some important product categories, pointing towards a lukewarm or negligible growth in imports of these. For instance, the imports of the product category HS Code 270900 (petroleum oils and oils obtained from bituminous minerals, crude) grew at a low CAGR of 3% during 2015–19. Further, it does not hold any export potential for India as India is itself a net importer of crude oil with no exports of this product category.

Similarly, if we examine an electronics sector product, HS Code 851712 (telephones for cellular networks 'mobile telephones' or for other wireless networks) has displayed a highly negative imports' CAGR of -14% for the period 2015–19. Despite India being ranked at no. 11 for South Africa, the export values for 2015–19 are paltry, thus holding no prospects for increasing exports. Another example is that of the product category with HS Code 847130 (data-processing machines, automatic, portable, weighing ≤ 10 kg, consisting of at least a central processing unit, a keyboard and a display, excluding peripheral units) which exhibited negative imports CAGR of -1%; India is ranked at 14th position but exports are almost inconsequential at US\$ 0.3 million in 2019, up from US\$ 8,000 in 2015. Also, globally, India is ranked low at 38 and, therefore, though there is no preferential tariff, India's current exports are too minuscule to indicate potential.

The product category with HS Code 870421 (motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine 'diesel or semi-diesel engine' of a gross vehicle weight ≤ 5 t, excluding dumpers for off-highway use of subheading 870410 and special purpose motor vehicles of heading 8705) has recorded negative imports CAGR of -6%. Although India was ranked as the 10th-largest source country, exports declined substantially in 2019. India's low global ranking of 21 coupled with free-trade partners getting preferential tariffs render no export potential for this product category.

On the other hand, the analysis undertaken for South Africa's top 25 imports indicates substantial import demand for some non-essential products such as documents of title, diamonds and perfumes. For instance, the product category with HS Code 710231 (non-industrial diamonds unworked or simply sawn, cleaved or bruted, excluding industrial diamonds) has displayed strong double-digit imports CAGR of 10%. Although India is not a source country for South Africa, India is ranked high at no. 7 as a source country globally and, therefore, there appears to be potential and capacity for this product although Indian industry has not ventured into the South African market so far.

Another case in point is the product category with HS Code 851762 (machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus, excluding telephone sets, telephones for cellular networks or for other wireless networks), which displayed a strong imports' CAGR of 15% — despite a low global ranking of 28 in exports of this product, India is ranked quite high at no. 3 as a source country of this product category for South Africa. Thus, overall, there exist good prospects for increasing exports of this product to South Africa.

There are certain product categories where South Africa has preferential tariffs for trade partners. One such product is HS Code 870321 (motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity $\leq 1.000 \text{ cm}^3$, excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 870310), which had an imports' CAGR of 6%. In this case, South Africa levies an average MFN tariff of 10% and much-reduced preferential tariffs for trade partner countries. In spite of that, India is still ranked no. 1 for South Africa and globally at no. 9, indicating a very strong comparative advantage for Indian exports of this product category to South Africa.

Certain product categories such as HS Code 281820 (aluminium oxide, excluding artificial corundum), with an imports' CAGR of 3%, for which the value of India's exports is low, but India's global ranking is high, in the top 10 source countries. Thus, although India's exports of this product category to South Africa are low currently, there scope for increasing exports because of positive imports CAGR, good global ranking and no preferential tariffs.

The top 25 imports analysis for South Africa shows that there exist certain product categories whose imports, despite having witnessed a low or negative imports CAGR or, preferential tariffs, still hold potential for Indian exporters. One such product category is HS Code 271012 (light oils and preparations, of petroleum or bituminous minerals which $\geq 90\%$ by volume 'incl. losses' distil at 210°C 'ASTM D 86 method', excluding containing biodiesel) whose imports have registered a negative imports CAGR of -1%. The average MFN tariff of 5% is levied on this product with preferential tariffs for free-trade partners SACU and SADC. Although preferential tariff is also applicable for EC countries, there is not much difference between the average MFN tariff and the preferential tariff for EC countries. Despite imports from India being subjected to the MFN tariff, India is still ranked high at no. 2 as a source country for this product. Hence, there is scope for India to garner a larger share of South Africa's imports of this category owing to global ranking of 6, country ranking of 2 and demonstrated strength even in the face of preferential tariffs.

While this report analyses the import profile in detail, it would be prudent to undertake a deep-dive into each potential product for export by studying the historical and current market trends; policies and regulations; market share of companies; price trends; infrastructure; logistics; market drivers of sectoral/product growth; assessment of the growth potential of specific product(s)/services; identification of external business environment challenges; and, an analysis of sectoral developments, evolving policy and regulatory landscape, changing consumer preferences, technology trends, etc., to assess the viability of exporting products that appear to have a steady export demand and market.

ANNEXURE 1

LIST OF IMPORTERS OF HS CODE 270900 (Petroleum oils and oils obtained from bituminous minerals, crude)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Multisol South Africa (Pty) Ltd	Carl Marcel Blomme (Director)	+27 219507880; https://multisolgroup.com

ANNEXURE 2

LIST OF IMPORTERS OF HS CODE 271012 (Light oils and preparations, of petroleum or bituminous minerals which >= 90% by volume "incl. losses" distil at 210°C "ASTM D 86 method", excluding containing biodiesel)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Easigas (Pty) Ltd	Frederic Emile Royer (Director)	+27 113897700; http://www.easigas.com/

ANNEXURE 3

LIST OF IMPORTERS OF HS CODE 851762 (Machines for the reception, conversion and transmission or regeneration of voice, images or other data, incl. switching and routing apparatus, excluding telephone sets, telephones for cellular networks or for other wireless networks)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Broadcast & Installation Engineering (Pty) Ltd	Becker Gunthar (MD)	+27 11 452 4963; http://www.broadcast.za.net/
2.	Acer Africa (Pty) Ltd	Emmanuel Pierre Marie Fromont (Director)	+27 112336100; https://www.acer.com/ac/en/ZA/
3.	E'n I Electrical- Instrumentation Engineering and Contractors	Louis Fredrick Jacobus Meiring (Director)	+27 117922803
4.	Phoenix Contact (Pty) Ltd	Gisbert Gottfried Ernst Karl Hodde (Director)	+27 118018200; https://www.phoenixcontact.com/
5.	Schneider Electric South Africa (Pty) Ltd	Bongani Mbongeni Twala (Director)	+27 112546400; https://www.se.com/za/en/
6.	Abb South Africa (Pty) Ltd	Andreas Erwin Fritz Krause (Director)	+27 102025000; https://new.abb.com/africa
7.	Aggreko Energy Rental South Africa (Pty) Ltd	Andrew Kenneth Obrien (Director)	+27 113578900; https://www.aggreko.com/en-za
8.	Electrolink (Pty) Ltd - Ebv Electrolink	Christian Siegfried Helmut Meier (Director)	+27 214021940
9.	General Electric South Africa (Pty) Ltd	Lwazi Sikwebu (Director)	+27 112370000; https://www.ge.com/africa/content/south-africa

10.	Honeywell Southern Africa (Pty) Ltd	Leoni Gertruida Strachan (Director)	+27 116958000; https://www.honeywell.com/en-us/global/en-za
11.	Rockwell Automation (Pty) Ltd	Barry Norton Elliott (Director)	+27 116549700; https://www.rockwellautomation.com

ANNEXURE 4

LIST OF IMPORTERS OF HS CODE 300490 (Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes, put up in measured doses "incl. those in the form of transdermal administration" or in forms or packings for retail sale, excluding medicaments containing antibiotics, medicaments containing hormones or steroids used as hormones, but not containing antibiotics, medicaments containing alkaloids or derivatives thereof but not containing hormones or antibiotics and medicaments containing provitamins, vitamins or derivatives thereof used as vitamins)

S. No.	COMPANY NAME	CONTACT PERSON	CONTACT INFORMATION
1.	Aurobindo Pharma (Pty) Ltd	Phaneendra Prasad Gorla (Director)	+27 118679100
2.	Fresenius Kabi South Africa (Pty) Ltd	Albertha Magdalena Nel (Director)	+27 115450000; https://www.fresenius-kabi.com/za/
3.	Life Pharmacy Management Services (Pty) Ltd	Janette Lynne Joubert (Director)	+27 114900400
4.	Lundbeck (South Africa) (Pty) Ltd	Alberto Miguel Weder (Director)	+27 116991600; https://www.lundbeck.com/za
5.	Bristol-Myers Squibb (Pty) Ltd	Financial Waterford Financial Manag (Director)	+27 118085468; https://www.bms.com/
6.	Ceva Animal Health (Pty) Ltd	Carel Frederik Gangel (Director)	+27 113124088; https://www.ceva.co.za/
7.	Cipla-Medpro (Pty) Ltd	Jacques Bernard Van Staden (Director)	+27 219140520; https://www.cipla.co.za/
8.	Glaxosmithkline South Africa (Pty) Ltd	Andiswa Thandeka Ndoni (Director)	+27 117456000; https://www.gsk.com/en-gb
9.	Hartmann-Vitamed (Pty) Ltd	Erich Heinz Pampel (Director)	+27 117047420; https://www.hartmann.info/en-za
10.	Ingelheim Pharmaceuticals (Pty) Ltd	Andrew Halliday Eve (Director)	+27 113482400; https://www.boehringer-ingelheim.co.za/
11.	Kirsch Pharma South Africa (Pty) Ltd	Heinz Jurgen Kirsch (Director)	+27 113925171; https://www.kirschpharma.com/
12.	Medpro Pharmaceutica (Pty) Ltd - Cipla Medpro	Jacques Bernard Van Staden (Director)	+27 219140520; https://www.cipla.co.za/
13.	Modhomco (Pty) Ltd	Stefanus Johannes Blignaut (Director)	+27 126548921; https://modhomco.co.za/
14.	Novartis South Africa (Pty) Ltd	Carlos Dicken Alberto Garcia Iragorri (Director)	+27 119299111; https://www.novartis.co.za/
15.	Novo Nordisk (Pty) Ltd	Jean Paul Michel Digy (Director)	+27 112020500; https://www.novonordisk.com/
16.	Pierre Fabre South Africa (Pty) Ltd	Frederic Marie Duchesne (Director)	+27 118035140

17.	Ranbaxy (S A) (Pty) Ltd	Desmond William Brothers (Director)	+27 126432000; https://www.sunpharma.com/node/44465
18.	Smith and Nephew (Pty) Ltd	Chetty Amsavathie (Director)	+27 312428111
19.	Xixia Pharmaceuticals (Pty) Ltd	Kriantha Naidoo (Director)	+27 114511300
20.	Zedkem International (Pty) Ltd	Bodd Hermann Carl Zwiebler (Director)	+27 116221878
21.	Zentiva South Africa (Pty) Ltd	Grant Richard Pettitt (Director)	+27 112563700; https://www.zentiva.com/
22.	Zydus Healthcare S A (Pty) Ltd	Isabel Freda Olivier (Director)	+27 129910730
23.	Eli Lilly (S A) (Pty) Ltd	Andre Westerveld (Director)	+27 115109300; https://www.lilly.com/
24.	Pharma-Q (Pty) Ltd	Anthony Lesch (Director)	+27 112471600; http://www.pharmaq.co.za/
25.	Pfizer Laboratories (Pty) Ltd	Jennifer Campbell Power (Director)	+27 113206000; https://www.pfizer.co.za/
26.	Glenmark Pharmaceuticals South Africa (Pty) Ltd	Cherylann Maria Pinto (Director)	+27 115643900; http://www.glenmarkpharma.com
27.	Equico Importers CC	Dubsky D (Director)	+27 41 992 2508; https://greatimports.co.za/
28.	Stapol (Pty) Ltd	Shellard David (Director)	+27 41 484 3396; http://www.stapol.co.za/

ANNEXURE 5

LIST OF IMPORTERS OF HS CODE 851712 (Telephones for cellular networks "mobile telephones" or for other wireless networks)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Tech Ring South Africa CC	McConaghy John (MD)	+27 11 784 3088; http://www.techring.co.za/
2.	Tellumat (Pty) Ltd	Andrew Farnell Connold (Director)	+27 217102911; https://tellumat.com/

ANNEXURE 6

LIST OF IMPORTERS OF HS CODE 490700 (Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; banknotes; cheque forms; stock, share or bond certificates and similar documents of title)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	M De Wet Promotions CC	De Wet H.C.M (Director)	+27 11 433 8808; http://www.mdewetpromotions.co.za/
2.	Sa Greetings Corporate (Pty) Ltd	Charlton John (Chairman)	+27 31 275 6700; http://www.sagreetings.co.za/

ANNEXURE 7

LIST OF IMPORTERS OF HS CODE 870322 (Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity > 1.000 cm³ but <= 1.500 cm³, excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

HS CODE 870323 (Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity > 1.500 cm³ but <= 3.000 cm³, excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

HS CODE 870332 (Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a cylinder capacity > 1.500 cm³ but <= 2.500 cm³, excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

HS CODE 870321 (Motor cars and other motor vehicles principally designed for the transport of persons, incl. station wagons and racing cars, with spark-ignition internal combustion reciprocating piston engine of a cylinder capacity <= 1.000 cm³, excluding vehicles for the transport of persons on snow and other specially designed vehicles of subheading 8703.10)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	General Motors South Africa (Pty) Ltd	Andrew Stephen Alexander (Director)	+27 414039111
2.	Grupo Antolin South Africa (Pty) Ltd	Ernesto Arribas Antolin (Director)	+27 419950700
3.	Sandown Motor Holdings (Pty) Ltd	Berly Delores Kerr (Director)	+27 218721531; https://www.sandown.co.za
4.	Scania South Africa (Pty) Ltd	Mohamed Yunus Abdool Kadir Hashimbhai (Director)	+27 116619600; https://www.scania.com/za/en
5.	Suzuki Auto South Africa (Pty) Ltd	Kinji Saito (Director)	+27 115741900; https://www.suzukiauto.co.za
6.	Toyota South Africa (Pty) Ltd	Andrew Philip Kirby (Director)	+27 118099111; https://www.toyota.co.za
7.	Volvo (Southern Africa) (Pty) Ltd	Ingrid Susanne Jannesson (Director)	+27 118425000; https://www.volvogroup.com/en-en
8.	Busmark 2000 (Pty) Ltd	Collins C H (Director)	+27 11 412 2927; https://www.busmark.co.za/
9.	Fiat Group Automobiles South Africa (Pty) Ltd	Alberto Ferrarotti (Director)	+27 102525000; https://www.fiat.co.za
10.	Ford Motor Company of Southern Africa (Manufacturing) (Pty)	Dhiren Krishnalal Vanmali (Director)	+27 128422911; https://www.ford.co.za/
11.	Subaru Southern Africa (Pty) Ltd	Hiroyoshi Yoshikawa (Director)	+27 116080116; https://www.subaru.co.za

ANNEXURE 8

LIST OF IMPORTERS OF HS CODE 847130 (Data-processing machines, automatic, portable, weighing <= 10 kg, consisting of at least a central processing unit, a keyboard and a display, excluding peripheral units)

HS CODE 847150 (Processing units for automatic data-processing machines, whether or not containing in the same housing one or two of the following types of unit: storage units, input units, output units, excluding those of heading 8471.41 or 8471.49 and excluding peripheral units)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Attachmate Group South Africa (Pty) Ltd	Graham Howard Norton (Director)	+27 113228300
2.	Dimension Data (Pty) Ltd	Andile Abner Ngcaba (Director)	+27 115750000; https://www.dimensiondata.com/en-gb
3.	Microsoft (S A) (Pty) Ltd	Benjamin Owen Orndorff (Director)	+27 113619000; https://www.microsoft.com/en-za
4.	Acer Africa (Pty) Ltd	Emmanuel Pierre Marie Fromont (Director)	+27 112336100; https://www.acer.com
5.	Dell Computer (Pty) Ltd	Janet Wright (Director)	+27 117097700
6.	Fujitsu Services (Pty) Ltd	Johannes Willem Burger (Director)	+27 112335911; https://www.fujitsu.com/za/
7.	IBM South Africa (Pty) Ltd	Hamilton Mmuagabo Hosiah Ratshefola (Director)	+27 113029111; https://www.ibm.com/za-en
8.	Lexmark International South Africa (Pty) Ltd	Claudio Angelo Cremonesi (Director)	+27 413732549; https://www.lexmark.com/en_za.html
9.	Pinnacle Micro (Pty) Ltd	Alexander Maxwell Stone (Director)	+27 112653000; https://www.pinnacle.co.za/
10.	Ricoh South Africa (Pty) Ltd	Henning Rudbech Pedersen (Director)	+27 117235140; https://www.ricoh.co.za/index.html

ANNEXURE 9

LIST OF IMPORTERS OF HS CODE 880240 (Aeroplanes and other powered aircraft of an of an unladen weight > 15,000 kg, excluding helicopters and dirigibles)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Aerotechnic (Pty) Ltd	Guyeu J. P (Chief Operating Officer)	+27 21 421 4575; https://www.aerotechnic-sa.com/

ANNEXURE 10
LIST OF IMPORTERS OF HS CODE 281820 (Aluminium oxide, excluding artificial corundum)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Stapol (Pty) Ltd	Shellard David (Director)	+27 41 484 3396; http://www.stapol.co.za/
2.	Clariant Sasol Catalysts (Pty) Ltd	Alfred Christian (Director)	+27 169760700; https://www.clariant.com/en
3.	Dow Southern Africa (Pty) Ltd	Carsten Larsen (Director)	+27 115750808; https://africa.dow.com/en-us.html
4.	Glaxosmithkline South Africa (Pty) Ltd	Andiswa Thandeka Ndoni (Director)	+27 117456000; https://www.gsk.com/en-gb
5.	Henkel South Africa (Pty) Ltd	Carsten Michael Kern (Director)	+27 116172400; https://www.henkel.com
6.	Lanxess (Pty) Ltd	Benjamin Marais (Director)	+27 114574000; http://lanxess.co.za/
7.	Manuchar South Africa (Pty) Ltd	Mark Ria Cyriel Jacobs (Director)	+27 118942083; https://manuchar.co.za/
8.	Surtec Sa (Pty) Ltd	Chandler Stewart Smith (Director)	+27 123452215; https://www.surtec.com/en

ANNEXURE 11
LIST OF IMPORTERS OF HS CODE 710231 (Non-industrial diamonds unworked or simply sawn, cleaved or bruted, excluding industrial diamonds)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Best Beads CC	Milligan C (Director)	+27 21 671 6950
2.	Ukwasi Design CC	Hinds R (Chief Operating Officer)	+27 44 382 5412

ANNEXURE 12
LIST OF IMPORTERS OF HS CODE 330210 (Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, with a basis of one or more of these substances, of a kind used in the food and drink industries; other preparations based on odoriferous substances, of a kind used for the manufacture of beverages)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Dystar Boehme Africa (Pty) Ltd	Kadletz Klaus Walter (Director)	+27 333908100; https://www.dystar.com/
2.	Givaudan South Africa (Pty) Ltd	Anna Magdalena Johanna Joubert (Director)	+27 114068700; https://www.givaudan.com/

ANNEXURE 13

LIST OF IMPORTERS OF HS CODE 100630 (Semi-milled or wholly milled rice, whether or not polished or glazed)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Anglo American Farms Ltd	Donald Eric Tooth (Director)	+27 218471334
2.	Kellogg Company of South Africa (Pty) Ltd	Gerald Kanyi Mahinda (Director)	+27 112336600; https://www.kelloggs.co.za/en_ZA
3.	Prima Pasta and Biscuits (Pty) Ltd	Kosie Ferreira (Director)	+27 183323004

ANNEXURE 14

LIST OF IMPORTERS OF HS CODE 851770 (Parts of telephone sets, telephones for cellular networks or for other wireless networks and of other apparatus for the transmission or reception of voice, images or other data, n.e.s.)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Tech Ring South Africa CC	Mcconaghy John (Chief Operating Officer)	+27 11 784 3088; http://www.techring.co.za/
2.	Voice Logger South Africa (Pty) Ltd	Gericke W (MD/Chief Operating Officer)	+27 86 073 2673; https://www.voicelogger.co.za/

ANNEXURE 15

LIST OF IMPORTERS OF HS CODE 100199 (Wheat and meslin, excluding seed for sowing, and durum wheat)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Anglo American Farms Ltd	Donald Eric Tooth (Director)	+27 218471334
2.	Kellogg Company of South Africa (Pty) Ltd	Gerald Kanyi Mahinda (Director)	+27 112336600; https://www.kelloggs.co.za/en_ZA/
3.	Prima Pasta and Biscuits (Pty) Ltd	Kosie Ferreira (Director)	+27 183323004
4.	Gunnebo Industries (Pty) Ltd	Ake Mattias (Director)	+27 116146078; https://www.gunneboindustries.com

ANNEXURE 16
LIST OF IMPORTERS OF HS CODE 901890 (Instruments and appliances used in medical, surgical or veterinary sciences, n.e.s.)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Arthrocom (Pty) Ltd	Gordon Everil Froneman (Director)	+27 114520576
2.	B Braun Medical (Pty) Ltd	Annette Johanna Beller (Director)	+27 102223000; https://www.bbraun.co.za/en.html
3.	Beckman Coulter South Africa (Pty) Ltd	Barend Johannes Mynhardt (Director)	+27 115643000
4.	Biomerieux South Africa (Pty) Ltd	Alfredo Giangregorio (Director)	+27 112059700; https://www.biomerieux.co.za/
5.	Boston Scientific (South Africa) (Pty) Ltd	Daniel J Brennan (Director)	+27 118408600
6.	Clinisut (Pty) Ltd	Howard Frederick Oliver Vernon (Director)	+27 413739599; https://clinisut.com/
7.	Johnson And Johnson Medical (Pty) Ltd	Abeda Williams (Director)	+27 112651000; https://www.jnj.com/tag/south-africa
8.	LTC Tech South Africa (Pty) Ltd	Janet Sutherland (Director)	+27 114780411
9.	Medtronic (Africa) (Pty) Ltd	Majid A I Mohammad (Director)	+27 112609300; https://www.medtronic.com/za-en
10.	Wright Millners	Daniel Jonathan Millner (Director)	+27 215308800; http://www.millners.co.za
11.	Murex Biotech South Africa (Pty) Ltd	Gauta Phillip Mavundla (Director)	+27 117993200
12.	Teleflex Medical (Pty) Ltd	Gerard Daniel Mc Caffrey (Director)	+27 118074887; https://www.teleflex.com/south-africa/en
13.	Widex South Africa (Pty) Ltd	Jesper Funding Andersen (Director)	+27 873515105
14.	Akacia Medical (Pty) Ltd	Howard Frederick Oliver Vernon (Director)	+27 877401300; http://www.akaciamedical.co.za/
15.	Arjo Huntleigh South Africa (Pty) Ltd	Karen Louise Botma (Director)	+27 125272000
16.	Carl Zeiss (Pty) Ltd	Gail Helen Giordani (Director)	+27 118869510; https://www.zeiss.co.za
17.	Huntleigh Africa (Pty) Ltd - Hejsani Duncan Co Pty Ltd	Craig Alan Roddy (Director)	+27 125424680

ANNEXURE 17

LIST OF IMPORTERS OF HS CODE 843149 (Parts of machinery of heading 8426, 8429 and 8430, n.e.s.)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Caterpillar (Africa) (Pty) Ltd	Olivia Scholastic Burutsa (Director)	+27 119615041; https://www.caterpillar.com/en
2.	Hitachi Construction Machinery Southern Africa Co Ltd	Ahmed Moosa (Director)	+27 118417700; https://www.hitachicm.com
3.	Longboat Ltd	Christina Goosen (Director)	+27 117679300
4.	Outotec (RSA) (Pty) Ltd	Adel El Hattab (Director)	+27 126490100; https://www.outotec.com/
5.	Saint-Gobain Weber South Africa (Pty) Ltd	David Anderson (Director)	+27 113455300; https://www.za.weber/

ANNEXURE 18

LIST OF IMPORTERS OF HS CODE 844399 (Parts and accessories of printers, copying machines and facsimile machines, n.e.s., excluding of printing machinery used for printing by means of plates, cylinders and other printing components of heading 8442)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	Acer Africa (Pty) Ltd	Emmanuel Pierre Marie Fromont (Director)	+27 112336100
2.	Lexmark International South Africa (Pty) Ltd	Claudio Angelo Cremonesi (Director)	+27 413732549; https://www.lexmark.com/en_za
3.	Pinnacle Micro (Pty) Ltd	Alexander Maxwell Stone (Director)	+27 112653000; https://www.pinnacle.co.za
4.	Ricoh South Africa (Pty) Ltd	Henning Rudbech Pedersen (Director)	+27 117235140; https://www.ricoh.co.za

ANNEXURE 19

LIST OF IMPORTERS OF HS CODE 870421 (Motor vehicles for the transport of goods, with compression-ignition internal combustion piston engine "diesel or semi-diesel engine" of a gross vehicle weight <= 5 t, excluding dumpers for off-highway use of subheading 8704.10 and special purpose motor vehicles of heading 8705)

<u>S. No.</u>	<u>COMPANY NAME</u>	<u>CONTACT PERSON</u>	<u>CONTACT INFORMATION</u>
1.	TFM Industries (Pty) Ltd	Van Der Merwe J (Chief Operating Officer)	+27 11 316 41611; http://ritamholdings.com
2.	UD Trucks	Schultz Roy (Managing Director)	+27 12 564 9500; http://www.udtrucks.com/

ANNEXURE 20
LIST OF IMPORTERS OF HS CODE 850440 (Static converters)

S. No.	COMPANY NAME	CONTACT PERSON	CONTACT INFORMATION
1.	E'n I Electrical- Instrumentation Engineering and Contractors	Louis Fredrick Jacobus Meiring (Director)	+27 117922803
2.	Lighting Up Kzn (Pty) Ltd	Alvin Naidoo (Director)	+27 333422054
3.	Phoenix Contact (Pty) Ltd	Gisbert Gottfried Ernst Karl Hodde (Director)	+27 118018200; https://www.phoenixcontact.com
4.	Schneider Electric South Africa (Pty) Ltd	Bongani Mbongeni Twala (Director)	+27 112546400; https://www.se.com/za/en/
5.	Avnet South Africa (Pty) Ltd	Hannes Taute (Director)	+27 113198600; https://www.avnet.com
6.	Hellermanntyton (Pty) Ltd	Claude Ronald Middleton (Director)	+27 118796600; https://www.hellermanntyton.co.za/
7.	Ifm Electronic (Pty) Ltd	Alwyn James Skelton	+27 123454449; https://www.ifm.com/za/en
8.	Mahle Behr South Africa (Pty) Ltd	Alexander Guy Holmes (Director)	+27 317197600; https://www.mahle.com/en
9.	Saab Grintek Defence (Pty) Ltd	Chantelle Rae Ah Sing (Director)	+27 126726000; https://saab.com
10.	Zf Hubco Forgings (Pty) Ltd	Andrea Moz (Director)	+27 118270220
11.	Abb South Africa (Pty) Ltd	Andreas Erwin Fritz Krause (Director)	+27 102025000; https://new.abb.com/africa
12.	Aggreko Energy Rental South Africa (Pty) Ltd	Andrew Kenneth Obrien (Director)	+27 113578900; https://www.aggreko.com/en-za
13.	Electrolink (Pty) Ltd	Christian Siegfried Helmut Meier (Director)	+27 214021940; https://www.ebg.co.za
14.	General Electric South Africa (Pty) Ltd	Lwazi Sikwebu (Director)	+27 112370000; https://www.ge.com
15.	Honeywell Southern Africa (Pty) Ltd	Leoni Gertruida Strachan (Director)	+27 116958000; https://www.honeywell.com/en-us/global/en-za
16.	Rockwell Automation (Pty) Ltd	Barry Norton Elliott (Director)	+27 116549700; https://www.rockwellautomation.com



Confederation of Indian Industry 125 Years: 1895-2020

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes.

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CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

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India is now set to become a US\$ 5 trillion economy in the next five years and Indian industry will remain the principal growth engine for achieving this target. With the theme for 2019-20 as 'Competitiveness of India Inc - India@75: Forging Ahead', CII will focus on five priority areas which would enable the country to stay on a solid growth track. These are - employment generation, rural-urban connect, energy security, environmental sustainability and governance.

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Confederation of Indian Industry

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