



Agro-processing & Agribusiness Sector Report

This is where African
agriculture goes industrial



South Africa



EXECUTIVE SUMMARY

Africa's Agro-industrial Powerhouse

SOUTH AFRICA IS THE WORLD'S SECOND-LARGEST CITRUS EXPORTER, a top-five global table grape supplier, and Africa's leading wine producer. But this is more than fruit and vines — it's a modern, industrial agrifood economy.

WITH OVER R190 BILLION IN ANNUAL EXPORTS and a trade surplus of US\$6.5-7 billion, South Africa offers investors the infrastructure, IP, and innovation to build competitive, climate-resilient value chains — from processing and logistics to food tech and agri-biotech.

SOUTH AFRICA HAS MORE GREENHOUSES, cold-chain corridors, and export-compliant producers than any other African country. Major markets — from the Gulf to the EU, UK, China, and North America — already source from here.

AND THE GROWTH CONTINUES: record harvests, growing animal protein exports, fast-rising table grape demand, and a fertile pipeline of agro-industrial SEZs like Musina-Makhado, Maluti-A-Phofung, and the Fruit & Veg Corridor.



EXECUTIVE SUMMARY

Sector Highlights

906,000+

JOBS IN AGRI-FOOD VALUE
CHAINS

R60B

CITRUS
EXPORTS

R10.3B

WINE
EXPORTS

R4.9B

RED MEAT
EXPORTS

77.8M

CARTONS OF TABLE GRAPES
HARVESTED (2024/25)

70%+

OF EXPORTS ARE
VALUE-ADDED

US\$600M+

DEDICATED AGRO-INDUSTRIAL
ZONES WITH INCENTIVES





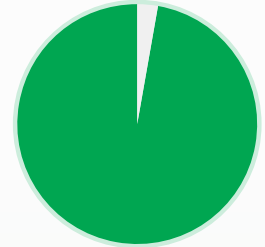
FULL SECTOR BRIEF

The Big Picture

South Africa is Africa's agro-industrial leader: the world's #2 citrus exporter, #5 in table grapes, and Africa's top wine producer. Agriculture contributes 2.8% of GDP directly—but 12–15% when you count the full supply chain from farm to fork.

The sector employs 906,000 people and generated record exports of US\$13.7 billion in 2024, up 3% year-on-year. In 2025, exports are running 10% higher, driven by surging fruit and nut volumes. The trade surplus stands at US\$5.1 billion.

What makes this compelling? Two investment stories in one: reliable cash flows from premium export chains serving 100+ countries, plus growth upside from 260 agri-tech startups boosting farm productivity by up to 30%.



2,8%

SECTOR CONTRIBUTION
TO GDP

260

AGRI-TECH
STARTUPS

US\$13.7B

EXPORTS IN 2024



FULL SECTOR BRIEF

Export Powerhouse

South Africa ships citrus worth R60 billion annually, wine at R10.3 billion, and red meat at approximately R4–5 billion. The 2024/25 table grape harvest hit a record 77.8 million cartons, reaching buyers across Europe, the UK, China, and the Gulf states. Citrus exports to Russia alone doubled.

Behind these numbers: world-class cold-chain infrastructure, rigorous quality controls, and geographic diversity—14 climate zones let South African farmers supply Northern Hemisphere markets during their off-season.

INVESTMENT OPPORTUNITY

Fund packhouses, refrigerated storage, and transport networks linking smallholder farms to export markets. Citrus alone moved R60 billion through these systems in 2024.





FULL SECTOR BRIEF

Innovation at Scale

Around 260 agri-tech startups are deploying sensors, drones, analytics, and farm-financing platforms. Adoption has passed 60%, lifting yields by up to 30% while cutting input costs. South African agribusinesses report a 67% innovation rate—the highest in Africa.

On the frontier, Newform Foods opened Africa's first cultivated-protein facility in 2025. Indigenous crops like rooibos (protected geographic indication) and sorghum are scaling sustainably for export.

INVESTMENT OPPORTUNITY

Back sensor networks, drone mapping, and farm-finance apps. Early-stage startups are securing Series A funding and winning customers across Southern Africa.





FULL SECTOR BRIEF

Who's Investing

Global players are expanding: PepsiCo invested R746 million in new snack lines in 2024 and pledged US\$100 million more in 2025.

Heineken's integration with Distell creates a continental beverage champion tapping into the African Continental Free Trade Area (a 1.4-billion-consumer market). Kerry Group built a R650-million ingredient facility. Local processors are adding packhouses and cold stores to handle surging export demand.

INVESTMENT OPPORTUNITY

Scale fast-charge corridors and depot charging for commercial fleets. Proof of concept exists; investor capital can accelerate national rollout linked to AfCFTA logistics hubs.





LOOKING AHEAD

Investment Opportunities

- 1 COLD-CHAIN LOGISTICS**
Fund packhouses, refrigerated storage, and transport networks linking smallholder farms to export markets.
Citrus alone moved R40 billion through these systems in 2024.
- 2 AGRI-TECH PLATFORMS**
Back sensor networks, drone mapping, and farm-finance apps.
Early-stage startups are securing Series A funding and winning customers across Southern Africa.
- 3 FRONTIER FOODS**
Invest in cultivated meat and indigenous-crop processing.
The protein transition and sustainability premium create new export categories.
- 4 CHARGING INFRASTRUCTURE**
Scale fast-charge corridors and depot charging for commercial fleets.
Proof of concept exists; investor capital can accelerate national rollout linked to AfCFTA logistics hubs.
- 5 AGRI-FINTECH**
Deploy credit scoring, weather insurance, and input financing for 906,000 workers and thousands of smallholders. Agri-finance grew 8% annually from 2022–24.



LOOKING AHEAD

Challenges & Fixes

- ✓ **DROUGHT STRESS AND WATER SCARCITY** are managed through precision irrigation and climate modeling.
- ✓ **PORT CONGESTION** is easing via private terminal investment and logistics reforms.
- ✓ **POWER CUTS** from load-shedding are mitigated by on-site generation.
- ✓ **COMPETITION** from Latin America and Asia is countered with premium branding and compliance leadership.
- ✓ **GOVERNMENT SUPPORT** includes the Agriculture Master Plan, processing incentives, and R10.56 billion in research funding (2024/25).
- ✓ **THE INDUSTRIAL DEVELOPMENT CORPORATION AND DEVELOPMENT BANK** finance infrastructure; the continental free-trade pact removes cross-border barriers.



IN SUMMARY

The Bottom Line

South Africa combines scale (US\$13.7B exports), innovation (260 tech startups), and access (100+ export markets).

For investors, it's a dual play: harvest steady returns from mature export chains and capture growth as technology lifts productivity across the value chain.

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