



## South Africa & Western Cape, Sanitary Market Trade, 2021

31/05/2021

## 1. INTRODUCTION

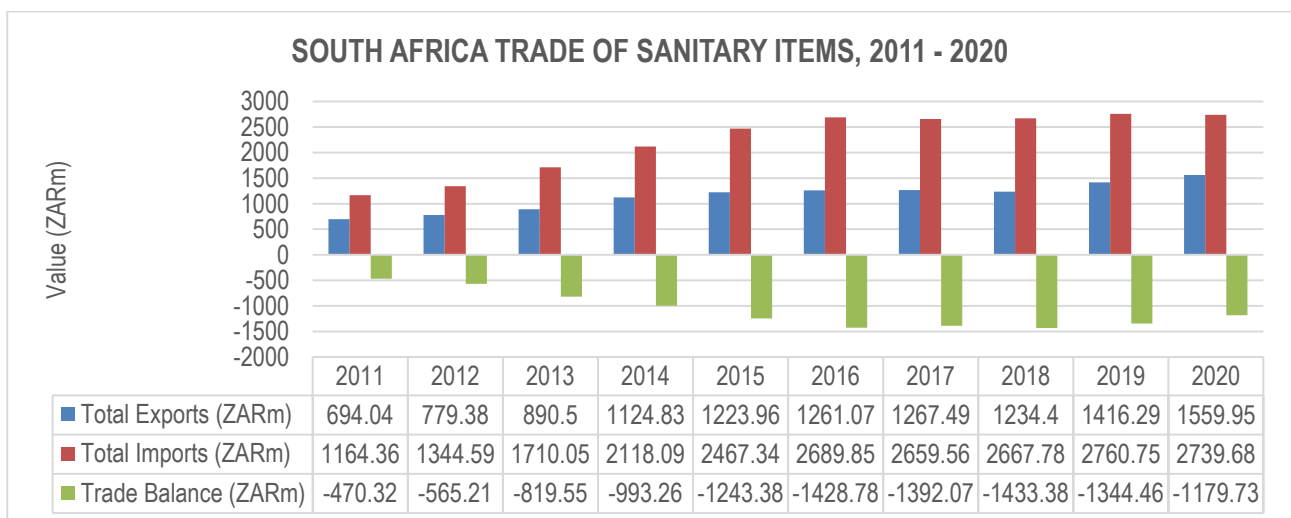
The following report provides a brief analysis of the trade patterns within the sanitary products industry in South Africa, as well as in the Western Cape. In particular, the report restricts its analysis to the following seven product categories which henceforth, will be referred to as sanitary products:

- HST391990: - Self-adhesive plates, sheets, film, foil, tape, strip and other flat shapes, of plastics, whether or not in rolls – (Other).
- HST392220: - Baths, shower-baths, sinks, wash-basins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware, of plastics – ( Lavatory seats and covers).
- HST392290: - Baths, shower-baths, sinks, wash-basins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware, of plastics – (Other).
- HST392321: Articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics HST392321 – (Of polymers of ethylene).
- HST481920: Cartons, boxes, cases, bags and other packing containers, of paper, paperboard, cellulose wadding or webs of cellulose fibres; box files, letter trays, and similar articles, of paper or paperboard of a kind used in offices, shops or the like - (Folding cartons, boxes and cases, of non-corrugated paper or paperboard).
- HST482110: Paper or paperboard labels of all kinds, whether or not printed – (Printed).
- HST732490: Sanitary ware and parts thereof, of iron or steel – (Other, including parts).

## 2. SOUTH AFRICA - TRADE

### 2.1 OVERALL TRADE

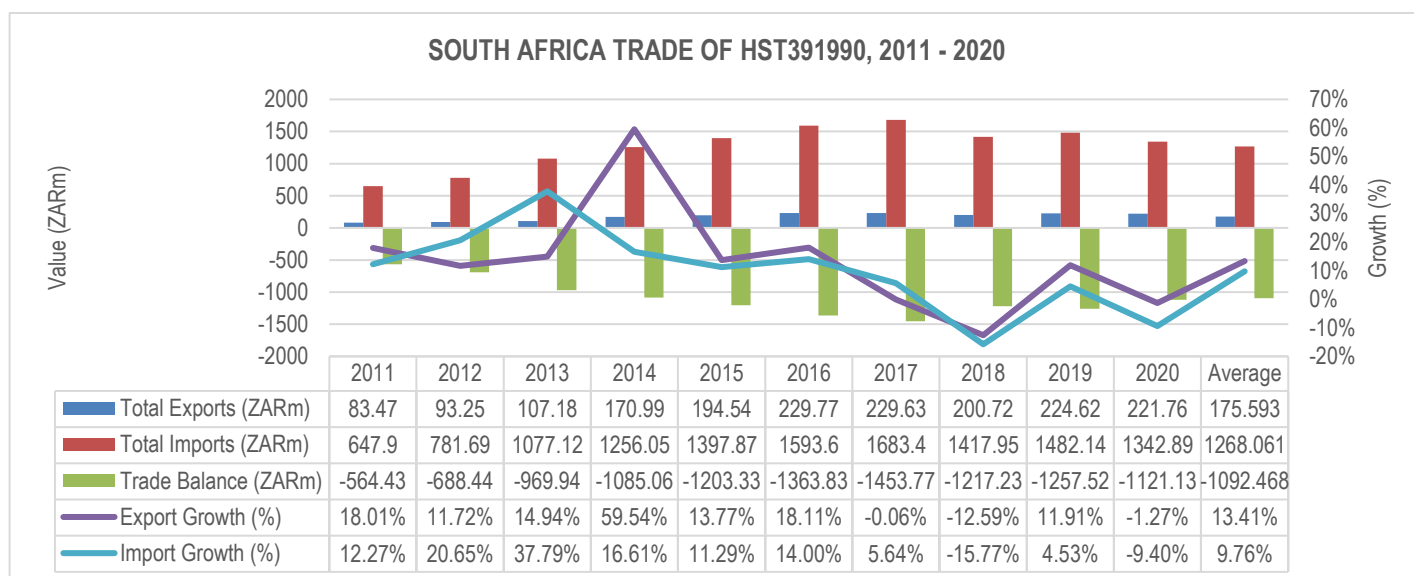
The graph below shows the combined aggregate trade flows of the above product categories as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was a net importer of sanitary products for the period 2011 to 2020. Total exports of sanitary products, albeit rising over the period, was nearly half that of sanitary product imports into South Africa over the period analysed. Moreover, total exports rose from ZAR694.04m in 2011 to ZAR1559.95m by 2020. Similarly, import costs of sanitary products more than doubled over the period, from ZAR1164.36m in 2011 to ZAR2739.68m in 2020. The net effect being a widening of the trade deficit, from ZAR470.32m in 2011 to ZAR1179.73m by 2020.



Source: Quantec, 2021

## 2.2 SOUTH AFRICA TRADE OF HS391990: - OTHER (Self-adhesive plates, sheets, film, foil, tape, strip and other flat shapes, of plastics, whether or not in rolls)

The graph below shows the trade flows of HS391990 as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was a net importer of HS391990 from the period 2011 to 2020. Total exports of HS391990, albeit rising over the period, was roughly a seventh of that of imports of product HS391990 into South Africa over the period. Moreover, total exports rose from ZAR83.47m in 2011 to ZAR221.76m by 2020. Similarly, import costs of product HS391990 more than doubled over the period, from ZAR647.90m in 2011 to ZAR1342.89m in 2020. The net effect being a wideing of the trade deficit, from ZAR564.43m in 2011 to ZAR1121.13m by 2020. Furthermore, exports of HS391990 increased at an average rate of 13.41% per annum over the period, while imports of HS391990 experienced an average annual growth rate of 9.76% from 2011 to 2020.



Source: Quantec, 2021

3

The table below shows South Africa's top import and export markets of product HS391990. From the table, it is clear that the United Kingdom was the top export market with a value of ZAR35.33m in 2020. Botswana, with exports totalling ZAR34.75m, followed in a close second position, and Namibia trailed in third place with exports reaching ZAR32.27m in 2020. Furthermore, Germany was the top market for South African imports of product HS391990, with imports of ZAR352.12m in 2020. Following closely in second place was China (ZAR227.97m), with the United States in third place, with imports reaching ZAR116.37m in 2020.

China was the highest growing destination market for South African exports of HS391990, reporting an average annual growth in exports of 1337.61% from 2011 to 2020. The United Kingdom was the second highest growth market (254.04%), followed by Lesotho which lagged far behind in third place, reaching an average growth of 28.34% per annum from 2011 to 2020. In contrast, Luxembourg was South Africa's highest growing import market, reporting an average annual rate of 3079.09% per annum from 2011 to 2020. Poland followed in second position, reaching an average rate of 45.54% per annum, while imports of HS391990 from India grew at 27.30% per annum from 2011 to 2020.

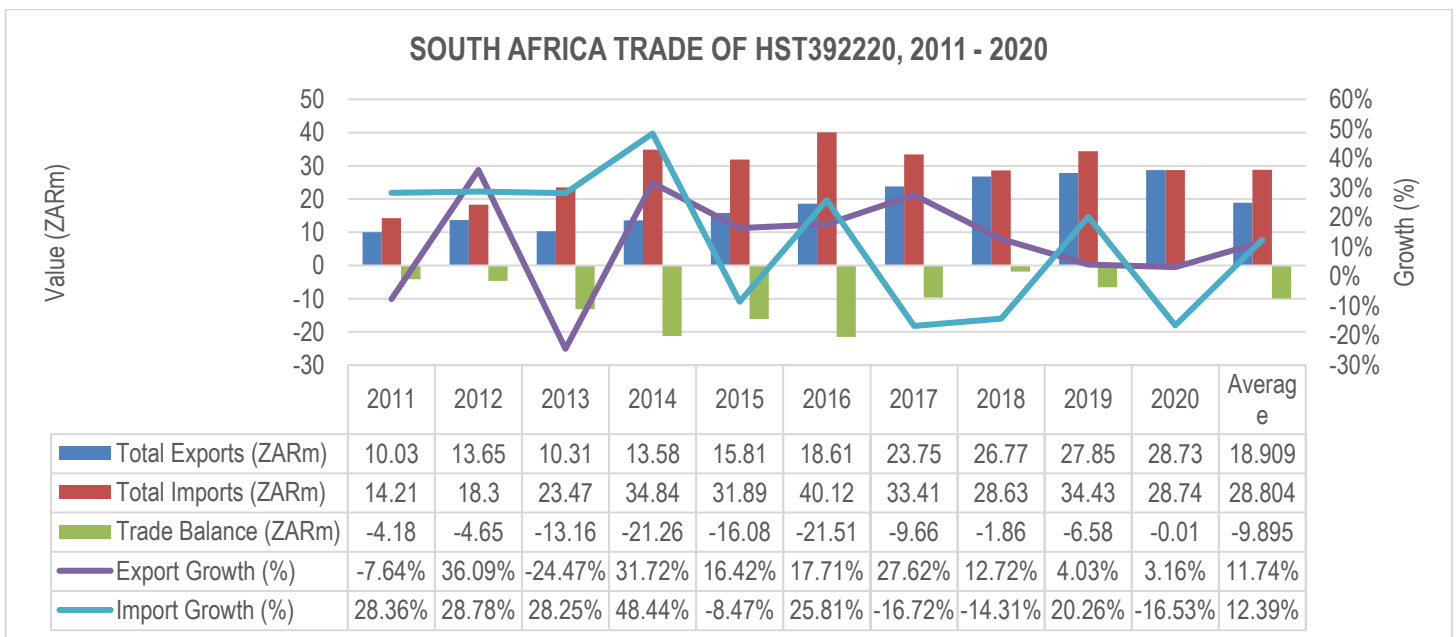
TOP SA EXPORT MARKETS: HS391990				TOP SA IMPORT MARKETS: HS391990			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	United Kingdom	35.33	254.04%	1	Germany	352.12	13.15%
2	Botswana	34.75	18.24%	2	China	227.97	12.85%
3	Namibia	32.27	15.37%	3	United States	116.37	4.79%
4	Zimbabwe	27.50	16.54%	4	Italy	97.29	12.60%
5	Zambia	15.56	9.08%	5	Belgium	65.11	9.75%
6	Mozambique	14.28	4.07%	6	India	62.40	27.30%
7	Swaziland	13.36	26.40%	7	Poland	53.18	45.54%
8	China	12.06	1337.61%	8	France	50.90	20.07%

9	Lesotho	5.62	28.34%	9	United Kingdom	50.85	11.80%
10	Malawi	5.13	13.18%	10	Luxembourg	38.85	3079.09%

Source: Quantec, 2021

### 2.3 SOUTH AFRICA TRADE OF HST392220: - Baths, shower-baths, sinks, wash-basins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware, of plastics – ( Lavatory seats and covers).

The graph below shows the trade flows of HS392220 as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was a net importer of HS392220 for the period 2011 to 2020. Total exports of HS392220 was roughly half of its import counterpart up to 2016. However, exports grew at a much faster rate than imports of HS392220 from 2017 to where the value of the two nearly equalised 2020. Moreover, total exports nearly tripled over the period, from ZAR10.03m in 2011 to ZAR28.73m by 2020. Similarly, import costs of product HS392220 grew from ZAR14.21m in 2011 to ZAR28.74m in 2020. The net effect being a narrowing of the trade deficit, from ZAR4.18m in 2011 to ZAR0.01m by 2020. Furthermore, exports of HS392220 increased at an average rate of 11.74% per annum over the period, while imports of HS392220 experienced an average annual growth rate of 12.39% from 2011 to 2020.



Source: Quantec, 2021

The table below shows South Africa's top import and export markets of product HS392220. From the table, it is clear that Namibia was the top export market with a value reaching ZAR12.92m in 2020. Egypt, with exports totalling ZAR3.61m, followed in a distant second position, and Swaziland trailed in third place with total exports of reaching ZAR2.57m in 2020. Furthermore, China was the top market for South African imports of product HS392220, with imports of ZAR16.68m in 2020. Following in second place was Germany (ZAR3.74m) and Italy in close third, with imports reaching ZAR3.45m in 2020.

The United Kingdom was the highest growing destination market for South African exports of HS392220, reporting an average annual growth in exports of 464.88% over the period 2011 to 2020. Ghana was the second highest export growth market (93.31%), followed by Malawi which lagged far behind in third place, reaching an average growth of 68.66% per annum from 2011 to 2020. In contrast, the United States was South Africa's highest growing import market, reporting an average annual rate of 40.49% per annum from 2011 to 2020. Italy followed in second position, reaching an average rate of 35.81% per annum, while imports of HS392220 from Slovakia grew at 23.79% per annum from 2011 to 2020.

TOP SA EXPORT MARKETS: HS392220				TOP SA IMPORT MARKETS: HS392220			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Namibia	12.92	42.70%	1	China	16.68	16.86%
2	Egypt	3.61	-	2	Germany	3.74	19.01%
3	Swaziland	2.57	13.14%	3	Italy	3.45	35.81%
4	Botswana	2.23	8.50%	4	Hong Kong	0.84	-
5	Lesotho	1.72	16.99%	5	Slovakia	0.77	23.79%
6	Zimbabwe	1.20	20.32%	6	Austria	0.71	18.93%
7	Zambia	1.01	16.73%	7	Turkey	0.55	11.25%
8	United Kingdom	0.85	464.88%	8	United Kingdom	0.45	15.28%
9	Malawi	0.81	68.66%	9	Czech Republic	0.35	-
10	Ghana	0.54	93.31%	10	United States	0.30	40.49%

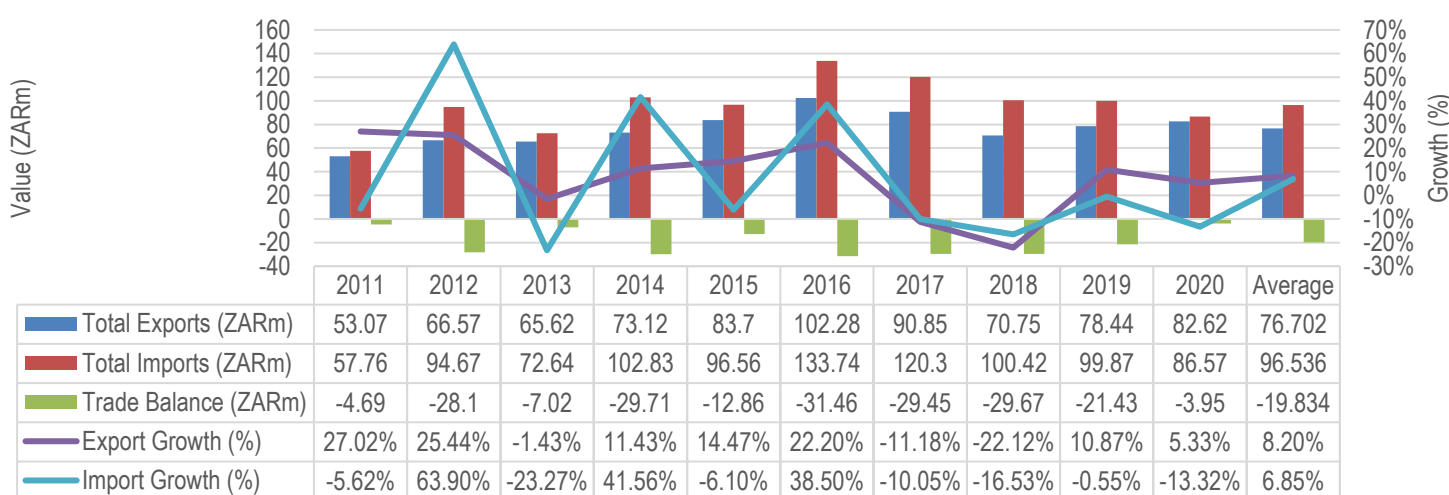
Source: Quantec, 2021

## 2.4 SOUTH AFRICA TRADE OF HST392290: - Baths, shower-baths, sinks, wash-basins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware, of plastics – (Other).

The graph below shows the trade flows of HS392290 as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was a net importer of HS392290 for the period 2011 to 2020 as exports lagged imports throughout the period under review. Overall, total exports increased over the period, from ZAR53.07m in 2011 to ZAR82.62m by 2020. Similarly, import costs of product HS392290 grew from ZAR57.76m in 2011 to ZAR86.57m in 2020. The net effect being a modest narrowing of the trade deficit, from ZAR4.69m in 2011 to ZAR3.95m by 2020. Furthermore, exports of HS392290 increased at an average rate of 8.20% per annum over the period, while imports of HS392290 experienced an average annual growth rate of 6.85% from 2011 to 2020.

5

SOUTH AFRICA TRADE OF HST392290, 2011 - 2020



Source: Quantec, 2021

The table below shows South Africa's top import and export markets of product HS392290. From the table, it is clear that Namibia was the top export market with a value reaching ZAR22.02m in 2020. Botswana, with exports totalling ZAR21.17m, followed in a close second position and Zimbabwe trailed in third place with total exports of reaching ZAR6.30m in 2020. Furthermore, Germany was the top market for South African imports of product HS392290, with imports of ZAR39.24m in 2020. Following in second place was China (ZAR21.75m), and Italy in third position, with imports reaching ZAR5.70m in 2020.

Kenya was the highest growing destination market for South African exports of HS392290, reporting an average annual growth in exports of 177.09% from 2011 to 2020. Mauritius was the second highest export growth market (101.30%), followed by Lesotho which lagged far behind in third place, reaching an average growth of 30.05% per annum from 2011 to 2020. In contrast, India was South Africa's highest growing import market, reporting an average annual rate of 1015.52% per annum from 2011 to 2020. The United Kingdom followed in second position reaching an average rate of 70.98% per annum, while imports of HS392290 from Taiwan followed in third, which grew at 57.14% per annum from 2011 to 2020.

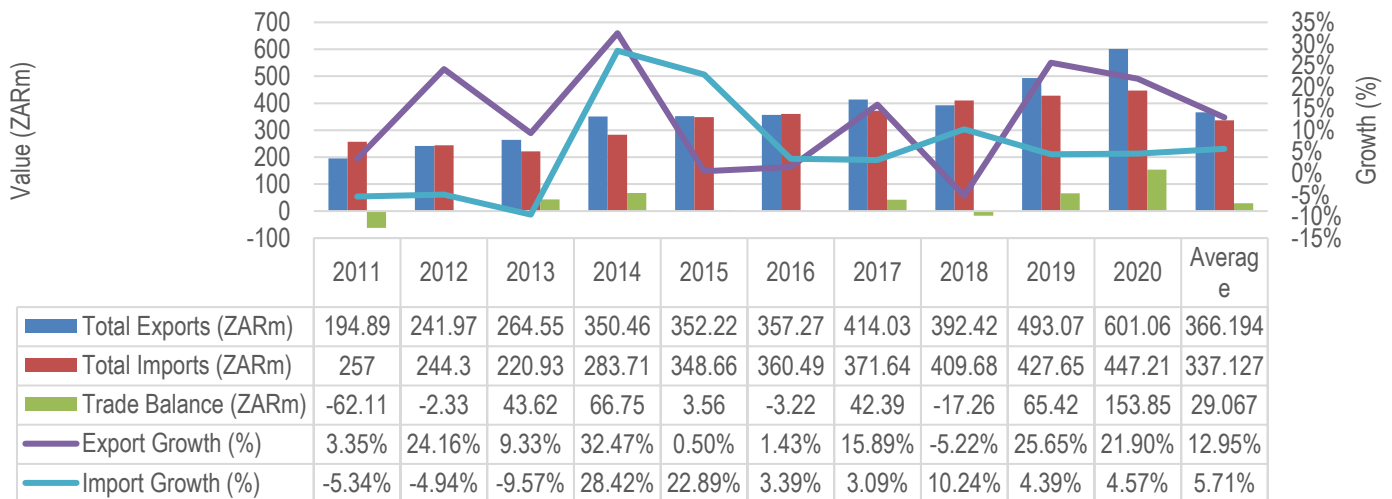
TOP SA EXPORT MARKETS: HS392290				TOP SA IMPORT MARKETS: HS392290			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Namibia	22.02	15.65%	1	Germany	39.24	9.55%
2	Botswana	21.17	13.57%	2	China	21.75	18.62%
3	Zimbabwe	6.30	7.39%	3	Italy	5.70	21.87%
4	Mozambique	5.83	25.46%	4	United Kingdom	5.67	70.98%
5	Zambia	5.41	14.84%	5	France	4.19	31.09%
6	Swaziland	3.94	11.13%	6	Netherlands	1.46	24.82%
7	Malawi	3.51	9.65%	7	Taiwan	1.43	57.14%
8	Lesotho	3.16	30.05%	8	United States	1.38	-4.36%
9	Mauritius	2.07	101.30%	9	Poland	1.31	31.75%
10	Kenya	1.55	177.09%	10	India	1.19	1015.52%

Source: Quantec, 2021

## 2.5 SOUTH AFRICA TRADE OF HST392321: - Articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics HST392321 – (Of polymers of ethylene).

The graph below shows the trade flows of HS392321 as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was both a net importer and exporter of HS392321 in particular years for the period 2011 to 2020. Albeit that South Africa reported a trade deficit of ZAR62.11m in 2011, exports grew at faster rate than imports over the period, resulting in a trade surplus of ZAR153.85m by 2020. Overall, total exports increased significantly over the period, from ZAR194.89m in 2011 to ZAR601.06m by 2020. Similarly, import costs of product HS392321 grew from ZAR257m in 2011 to ZAR447.21m in 2020. Furthermore, exports of HS392321 increased at an average rate of 12.95% per annum over the period, while imports of HS392321 experienced an average annual growth rate of 5.71% from 2011 to 2020.

### SOUTH AFRICA TRADE OF HST392321, 2011 - 2020



Source: Quantec, 2021

Further, the table below shows South Africa's top import and export markets of product HS392321. From the table, it is clear that the United States was the top export market with a value of ZAR252.72m in 2020. Namibia, with exports totalling ZAR90.39m, followed in second position, and Swaziland trailed in third place with total exports of ZAR47.45m in 2020. Furthermore, China was the top market for South African imports of product HS392321, with imports of ZAR120.66m in 2020. Following in second place was Turkey (ZAR39.99m), and Swaziland in close third, with imports reaching ZAR34.04m in 2020.

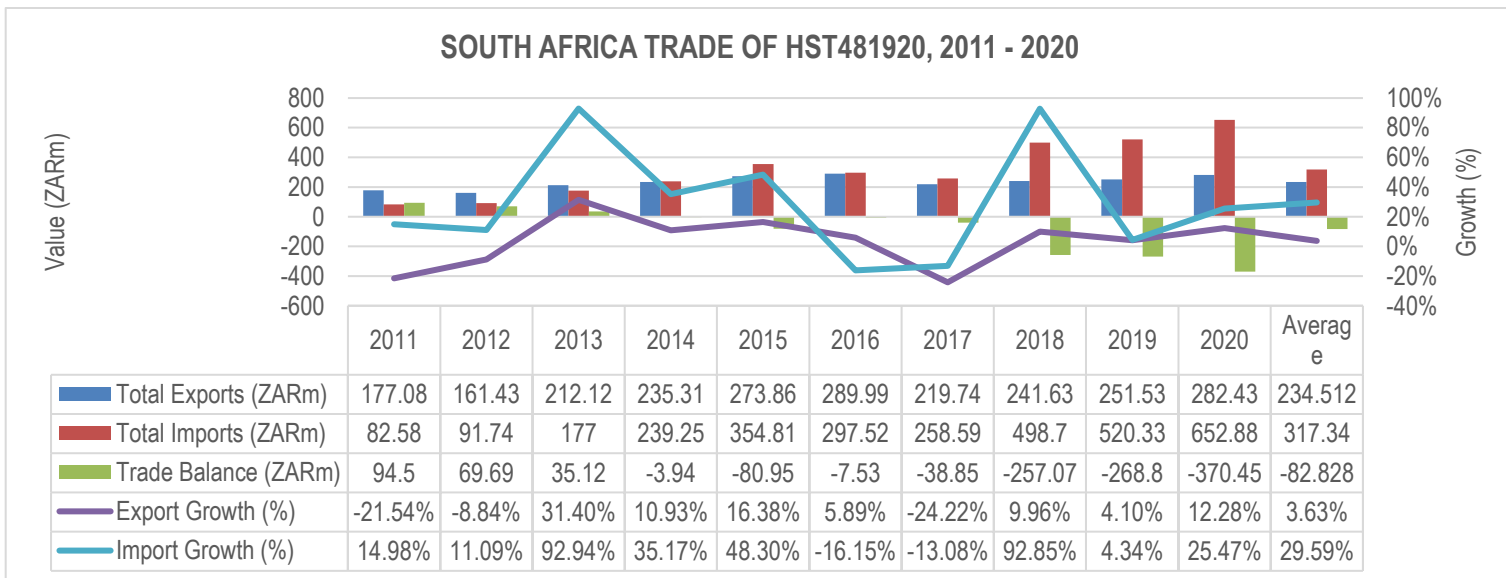
The Netherlands was the highest growing destination market for South African exports of HS392321, reporting an average annual growth in exports of 491.99% from 2011 to 2020. The United States was the second highest export growth market (85.99%), followed by Australia which lagged far behind in third place, reaching an average growth of 64.49% per annum from 2011 to 2020. In contrast, Germany was South Africa's highest growing import market, reporting an average annual rate of 119.97% per annum from 2011 to 2020. France followed in second position reaching an average rate of 110.70% per annum, while imports of HS392321 from Korea followed in third, growing at 85.18% per annum from 2011 to 2020.

TOP SA EXPORT MARKETS: HS392321				TOP SA IMPORT MARKETS: HS392321			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	United States	252.72	85.99%	1	China	120.66	13.33%
2	Namibia	90.39	12.41%	2	Turkey	39.99	20.44%
3	Swaziland	47.45	2.05%	3	Swaziland	34.03	-1.08%
4	Mozambique	32.60	18.00%	4	Thailand	28.83	6.80%
5	Australia	26.30	64.49%	5	United Kingdom	24.14	16.11%
6	Botswana	25.45	6.17%	6	France	21.73	110.70%
7	Lesotho	21.95	1.99%	7	Israel	21.64	28.39%
8	Zimbabwe	21.65	4.49%	8	Germany	17.91	119.97%
9	Zambia	20.10	16.04%	9	Korea	15.18	85.18%
10	Netherlands	9.86	491.99%	10	Vietnam	12.91	-

Source: Quantec, 2021

**2.6 SOUTH AFRICA TRADE OF HST481920:** - Cartons, boxes, cases, bags and other packing containers, of paper, paperboard, cellulose wadding or webs of cellulose fibres; box files, letter trays, and similar articles, of paper or paperboard of a kind used in offices, shops or the like - (Folding cartons, boxes and cases, of non-corrugated paper or paperboard).

The graph below shows the trade flows of HS481920 as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was net exporter of HS481920 from 2011 to 2013, but became a net importer from 2014 as imports exceeded exports. Moreover imports grew at a much faster rate than exports over the period, widening the trade deficit gap from ZAR3.94m in 2014 to ZAR370.45m by 2020. Overall, exports more than doubled over the period reviewed, from ZAR177.08m in 2011 to ZAR282.43m in 2020. Similarly, import costs of product HS481920 increased significantly from ZAR82.58m in 2011 to ZAR652.88m in 2020. Furthermore, exports of HS481920 increased at an meager average rate of 3.63% per annum over the period, while imports of HS481920 experienced an average annual growth rate of 29.59% from 2011 to 2020.



Source: Quantec, 2021

The table below shows South Africa's top import and export markets of product HS481920. From the table, it is clear that Zimbabwe was the top export market with a value reaching ZAR80m in 2020. Namibia with exports totalling ZAR72.38m followed in a close second position and Zambia trailed in third place with total exports of reaching ZAR41.79m in 2020. Furthermore, Germany was the top market for South African imports of product HS481920, with imports of ZAR515.55m in 2020. Following in second place was China (ZAR44.81m), and India in close third, with imports reaching ZAR34.47m in 2020.

Moreover, the United Arab Emirates was the highest growing destination market for South African exports of HS481920, reporting an average annual growth in exports of 1811.11% from 2011 to 2020. Lesotho was the second highest export growth market (38.88%), followed by Zambia which lagged far behind in third place, reaching an average growth of 25.32% per annum from 2011 to 2020. In contrast, the Netherlands was South Africa's highest growing import market, reporting an average annual rate of 1336.72% per annum from 2011 to 2020. Korea followed in second position reaching an average rate of 1221.32% per annum, while imports of HS481920 from Belgium followed in third which grew at 285.45% per annum from 2011 to 2020.

TOP SA EXPORT MARKETS: HS481920				TOP SA IMPORT MARKETS: HS481920			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Zimbabwe	80.00	6.83%	1	Germany	515.55	43.63%
2	Namibia	72.48	14.38%	2	China	44.81	17.80%
3	Zambia	41.79	25.32%	3	India	34.47	65.03%
4	Madagascar	22.32	17.35%	4	Netherlands	20.70	1336.72%

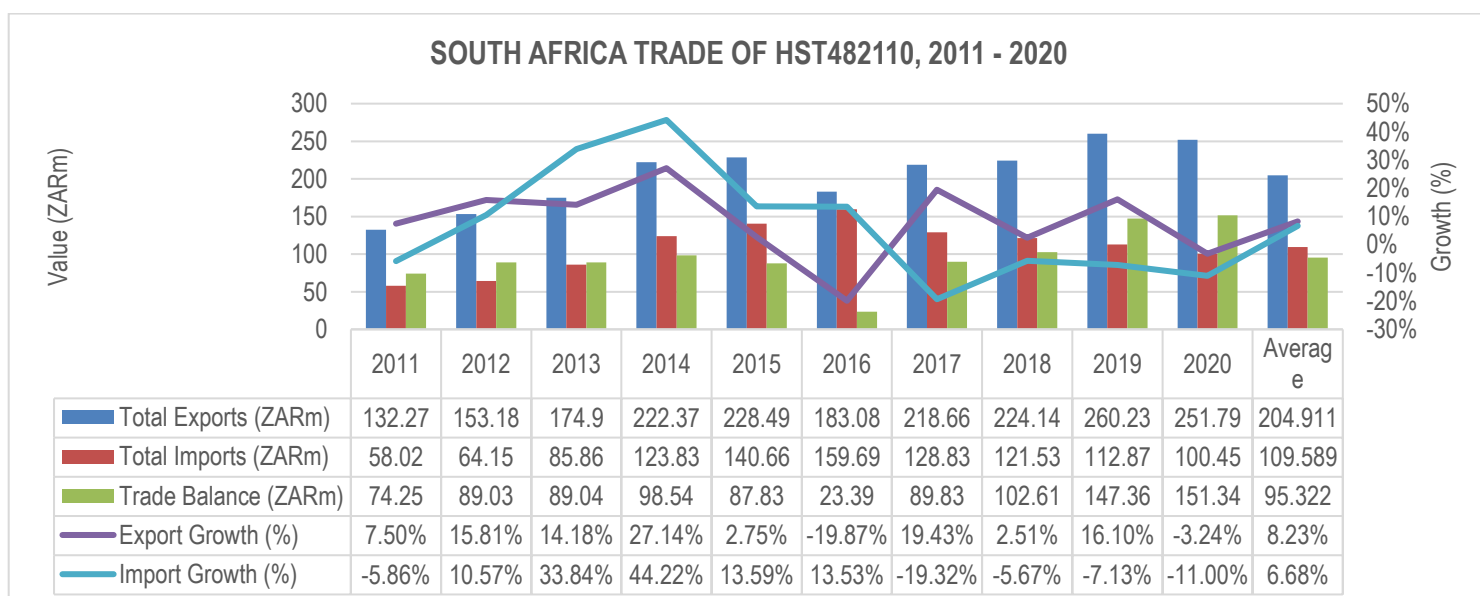


5	Botswana	19.54	15.40%	5	Korea	5.91	1221.32%
6	Swaziland	9.25	16.49%	6	Italy	5.81	95.31%
7	Mozambique	9.17	16.39%	7	Jordan	5.23	-
8	Malawi	6.16	0.74%	8	Denmark	4.78	155.73%
9	Lesotho	5.01	38.88%	9	Belgium	1.97	285.45%
10	United Arab Emirates	3.56	1811.11%	10	Switzerland	1.79	226.48%

Source: Quantec, 2021

## 2.7 SOUTH AFRICA TRADE OF HST482110: - Paper or paperboard labels of all kinds, whether or not printed – (Printed).

The graph below shows the trade flows of HS482110 as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was net exporter of HS482110 from 2011 to 2020 as exports exceeded imports – with the trade surplus widening from ZAR74.25m in 2011 to ZAR151.34m by 2020. Overall, exports increased from ZAR132.27m in 2011 to ZAR251.79m in 2020. Similarly, imports nearly doubled over the period, from ZAR58.02m in 2011 to ZAR100.45m in 2020. Furthermore, exports of HS482110 increased at an average rate of 8.23% per annum over the period, while imports of HS482110 experienced an average annual growth rate of 6.68% from 2011 to 2020.



Source: Quantec, 2021

The table below shows South Africa's top import and export markets of product HS482110. From the table, it is clear that Mozambique was the top export market with a value of ZAR93.44m in 2020. Namibia, with exports totalling ZAR41.44m, followed in second position and Zambia trailed in third place with total exports of reaching ZAR25.12m in 2020. Furthermore, Germany was the top market for South African imports of product HS482110, with imports of ZAR37.33m in 2020. Following in second place was Greece (ZAR21.80m), and China in third place, with imports reaching ZAR13.51m in 2020.

Moreover, Nigeria was the highest growing destination market for South African exports of HS482110, reporting an average annual growth in exports of 357.04% from 2011 to 2020. Mozambique was the second highest export growth market (23.14%), followed by Namibia which lagged in third place, reaching an average growth of 20.59% per annum from 2011 to 2020. In contrast, Belgium was South Africa's highest growing import market, reporting an average annual rate of 91.47% per annum from 2011 to 2020. The United Arab Emirates followed in second position reaching an average rate of 73.69% per annum, while imports of HS482110 from Spain followed in third, which grew at 62.46% per annum from 2011 to 2020.

TOP SA EXPORT MARKETS: HS482110				TOP SA IMPORT MARKETS: HS482110			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Mozambique	93.44	23.14%	1	Germany	37.33	18.83%
2	Namibia	41.44	20.59%	2	Greece	21.80	-
3	Zambia	25.12	11.17%	3	China	13.51	16.15%
4	Nigeria	17.56	357.04%	4	United States	6.78	31.07%
5	Swaziland	17.05	3.11%	5	Belgium	3.23	91.47%
6	Botswana	16.09	5.90%	6	United Kingdom	2.00	14.30%
7	Lesotho	14.45	5.62%	7	Spain	1.99	62.46%
8	Zimbabwe	8.92	15.90%	8	United Arab Emirates	1.94	73.69%
9	Malawi	4.75	12.58%	9	Japan	1.46	28.26%
10	Angola	3.31	4.28%	10	Denmark	1.39	41.93%

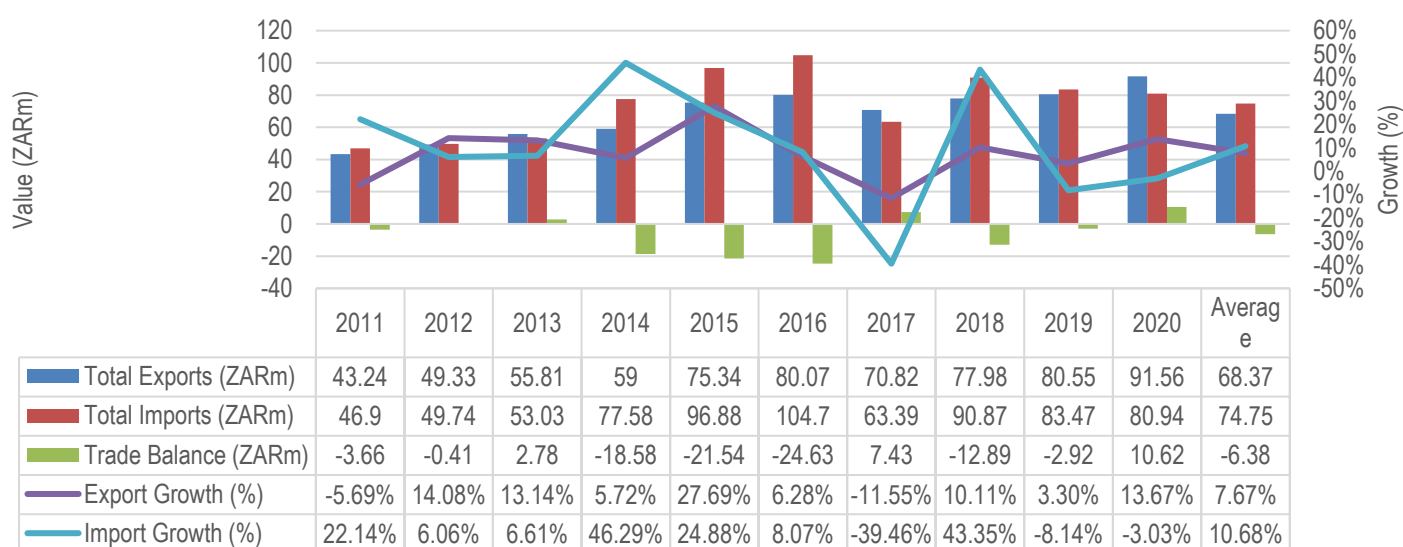
Source: Quantec, 2021

## 2.8 SOUTH AFRICA TRADE OF HST732490: - Sanitary ware and parts thereof, of iron or steel – (Other, including parts).

The graph below shows the trade flows of HS732490 as it relates to the South African market from 2011 to 2020. From the graph it is evident that South Africa was net importer of HS732490 for most of the period under review, besides for in 2013, 2017 and 2020 where it had a trade surplus of HS732490. Overall, exports increased from ZAR43.24m in 2011 to ZAR91.56m in 2020. Similarly, imports nearly doubled over the period, from ZAR46.90m in 2011 to ZAR80.94m in 2020. Furthermore, exports of HS732490 increased at an average rate of 7.67% per annum over the period, while imports of HS732490 experienced a higher average annual growth rate than growth in exports of 10.68% from 2011 to 2020.

10

SOUTH AFRICA TRADE OF HST732490, 2011 - 2020



Source: Quantec, 2021

The table below shows South Africa's top import and export markets of product HS732490. From the table, it is clear that Botswana was the top export market with a value of ZAR14.53m in 2020. Namibia, with exports totalling ZAR13.10m, followed in a close second position and Zambia trailed in third place with total exports of reaching ZAR9.56m in 2020. Furthermore, China was the top market for

South African imports of product HS732490, with imports of ZAR60.36m in 2020. Following in second place was United Arab Emirates (ZAR5.44m) and Italy in close third, with imports reaching ZAR3.12m in 2020.

Germany was the highest growing destination market for South African exports of HS732490, reporting an average annual growth in exports of 194.98% from 2011 to 2020. Australia was the second highest export growth market (57.39%), followed by New Zealand which lagged close behind in third place, reaching an average growth of 54.94% per annum from 2011 to 2020. In contrast, Poland was South Africa's highest growing import market, reporting an average annual rate of 654.41% per annum from 2011 to 2020. Portugal followed in second position reaching an average rate of 190.02% per annum, while imports of HS732490 from the United Arab Emirates followed in third position at 136.16% per annum from 2011 to 2020.

TOP SA EXPORT MARKETS: HS732490				TOP SA IMPORT MARKETS: HS732490			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Botswana	14.53	5.64%	1	China	60.36	13.79%
2	Namibia	13.10	13.45%	2	United Arab Emirates	5.44	136.16%
3	Zambia	9.56	22.24%	3	Italy	3.12	26.88%
4	Zimbabwe	8.88	20.80%	4	Portugal	2.99	190.02%
5	New Zealand	8.16	54.94%	5	Austria	1.72	10.38%
6	Mozambique	7.94	15.71%	6	Germany	1.15	13.98%
7	Germany	5.23	194.98%	7	Canada	1.07	-
8	United Arab Emirates	3.52	42.66%	8	Taiwan	0.82	9.49%
9	Australia	2.79	57.39%	9	Poland	0.74	654.41%
10	Cameroon	1.72	-	10	United Kingdom	0.67	21.03%

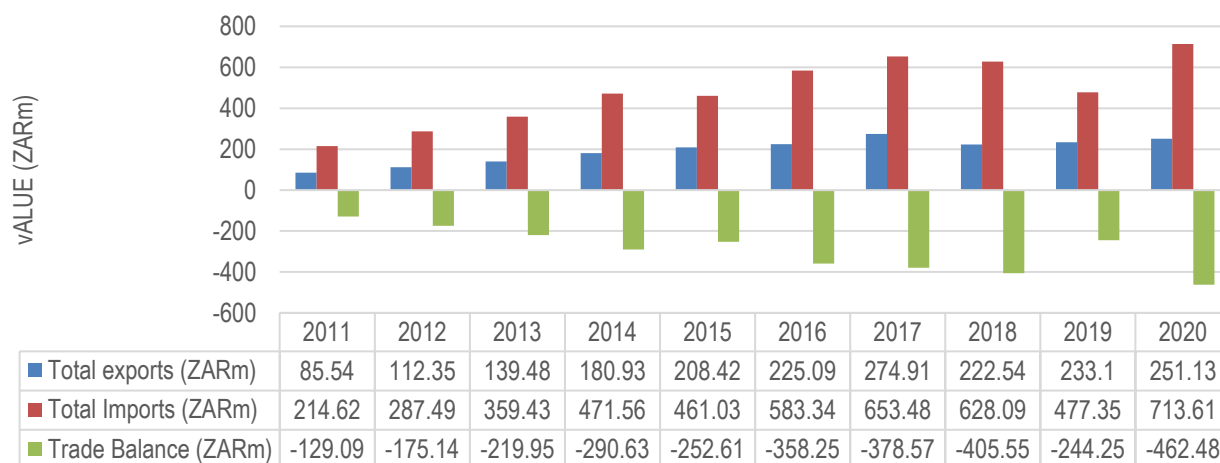
Source: Quantec, 2021

### 3. WESTERN CAPE – TRADE

#### 3.1 OVERALL TRADE

The graph below shows the combined aggregate trade flows of the above product categories as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net importer of sanitary products from the period 2011 to 2020. Total exports of sanitary products, albeit rising over the period, was less than half that of sanitary product imports into Western Cape over the period. Moreover, total exports tripled from ZAR85.54m in 2011 to ZAR251.13m by 2020. Similarly, import costs of sanitary products more than tripled over the period, from ZAR214.62m in 2011 to ZAR713.61m in 2020. The net effect being a wideing of the trade deficit, from ZAR129.09m in 2011 to ZAR462.48m by 2020.

### WESTERN CAPE TRADE OF SANITARY ITEMS, 2011 - 2020



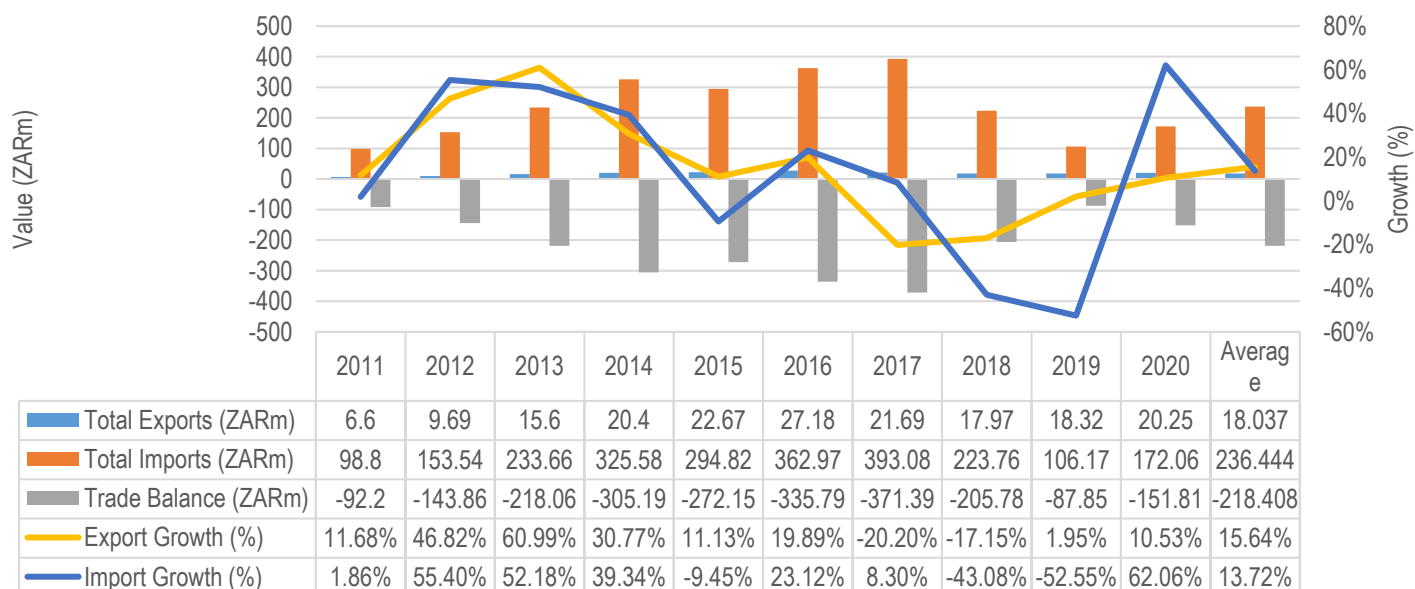
Source: Quantec, 2021

### 3.2 WESTERN CAPE TRADE OF HS391990: - OTHER (Self-adhesive plates, sheets, film, foil, tape, strip and other flat shapes, of plastics, whether or not in rolls)

The graph below shows the trade flows of HS391990 as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net importer of HS391990 for the period 2011 to 2020, with exports proving to be negligible when compared to import costs of HS391990. Moreover, total exports more than tripled over the period, from ZAR6.6m in 2011 to ZAR20.25m by 2020. Similarly, import costs of product HS391990 increased over the period, from ZAR98.8m in 2011 to ZAR172.06m in 2020. The net effect being a slight widening of the trade deficit, from ZAR92.2m in 2011 to ZAR151.81m by 2020. Furthermore, exports of HS391990 increased at an average rate of 15.64% per annum over the period, while imports of HS391990 experienced an average annual growth rate of 13.72% from 2011 to 2020.

12

### WESTERN CAPE TRADE OF HS391990, 2011 - 2020



Source: Quantec, 2021

The table below shows Western Cape's top import and export markets of product HS391990. From the table, it is clear that Namibia was the top export market with a value reaching ZAR7.00m in 2020. Botswana, with exports totalling ZAR4.07m, followed in second position and Angola trailed in third place with total exports reaching ZAR1.84m in 2020. Furthermore, Germany was the top market for

Western Cape imports of product HS391990, with imports of ZAR81.14m in 2020. Following in second place was China (ZAR26.67m), and Singapore in third, with imports reaching ZAR18.21m in 2020.

Moreover, Zimbabwe was the highest growing destination market for Western Cape exports of HS391990, reporting an average annual growth in exports of 95.41% from 2011 to 2020. Botswana was the second highest growth market (73.03%), followed by Swaziland in third place, reaching an average growth of 70.23% per annum from 2011 to 2020. In contrast, Italy was the Western Cape's fastest growing import market, reporting an average annual rate of 158.36% per annum from 2011 to 2020. France followed in second position, reaching an average rate of 49.89% per annum, while imports of HS391990 from Japan grew at 31.65% per annum from 2011 to 2020.

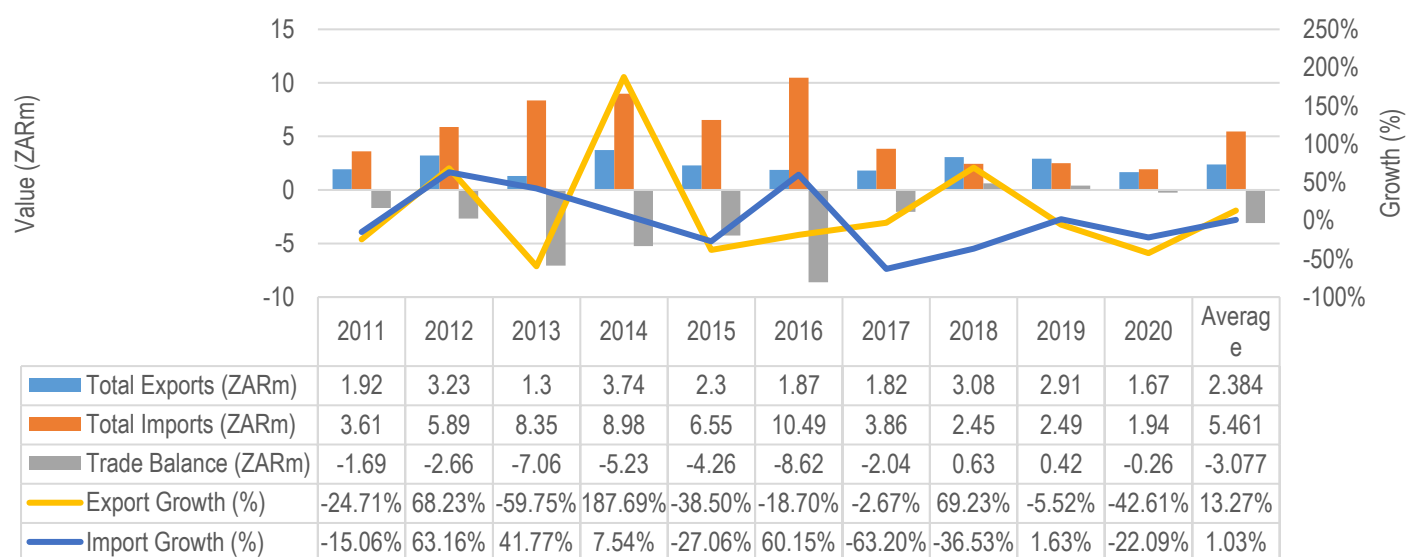
TOP WC EXPORT MARKETS: HS391990				TOP WC IMPORT MARKETS: HS391990			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Namibia	7.00	15.09%	1	Germany	81.14	23.94%
2	Botswana	4.07	73.03%	2	China	26.67	17.07%
3	Angola	1.84	43.93%	3	Singapore	18.21	-
4	Zambia	1.34	15.17%	4	United States	17.94	10.26%
5	Malawi	1.05	24.62%	5	France	7.43	49.89%
6	Mozambique	0.90	19.71%	6	Italy	5.44	158.36%
7	Zimbabwe	0.73	95.41%	7	United Kingdom	4.44	1.14%
8	Germany	0.47	-	8	Spain	2.34	29.92%
9	Swaziland	0.42	70.23%	9	Japan	2.19	31.65%
10	Saudi Arabia	0.40	-	10	Belgium	2.10	1.86%

Source: Quantec, 2021

### 3.3 WESTERN CAPE TRADE OF HST392220: - Baths, shower-baths, sinks, wash-basins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware, of plastics – ( **Lavatory seats and covers**).

The graph below shows the trade flows of HS392220 as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net importer of HS392220 for most of the period 2011 to 2020, besides in 2018 and 2019 where it experienced a trade surplus of ZAR0.63m and ZAR0.42m, respectively. Total exports of HS392220, albeit rising over the period, was less than half that of imports of product HS392220 into the Western Cape in the former half of the 10-year reviewed period. Moreover, total exports decreased slightly in value, from ZAR1.92m in 2011 to ZAR1.67m by 2020. Albeit rising sharply toward the middle of the 10-year period analysed, overall import costs of product HS392220 declined over the period, from ZAR3.61m in 2011 to ZAR1.94m in 2020. The net effect being a narrowing of the trade deficit, from ZAR1.69m in 2011 to ZAR0.26m by 2020. Furthermore, exports of HS392220 increased at an average rate of 13.27% per annum over the period, while imports of HS392220 experienced an average annual growth rate of 1.03% from 2011 to 2020.

### WESTERN CAPE TRADE OF HS392321, 2011 - 2020



Source: Quantec, 2021

The table below shows the Western Cape's top import and export markets of product HS392220. From the table, it is clear that the United Kingdom was the top export market with a value of ZAR0.85m in 2020. Namibia, with exports totalling ZAR0.48m, followed in second position, and Germany trailed in third place with total exports reaching ZAR0.20m in 2020. Furthermore, China was the top market for Western Cape imports of product HS392220, with imports of ZAR1.57m in 2020. Following closely in second place was Taiwan (ZAR0.20m), and Singapore in third, with imports reaching ZAR0.07m in 2020.

The United Kingdom was the highest growing destination market for Western Cape exports of HS392220, reporting an average annual growth in exports of 1029.28% from 2011 to 2020. Lesotho was the second highest growth market (303.40%), followed by Namibia which lagged far behind in third place, reaching an average growth of 68.15% per annum from 2011 to 2020. In contrast, the United States was the Western Cape's highest growing import market, reporting an average annual rate of 793.36% per annum from 2011 to 2020. Italy followed in second position, reaching an average rate of 33.75% per annum, while imports of HS392220 from China grew at 9.64% per annum from 2011 to 2020.

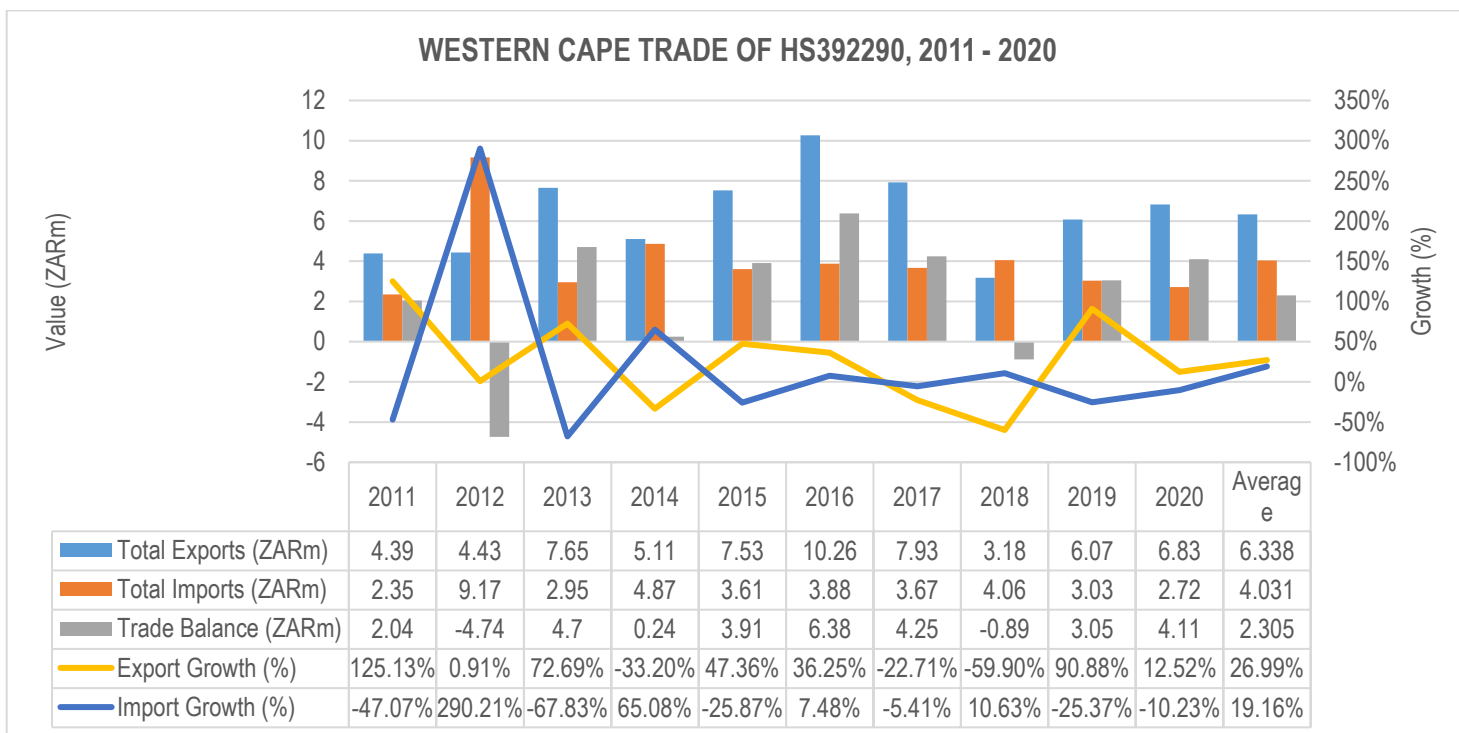
14

TOP WC EXPORT MARKETS: HS392220				TOP WC IMPORT MARKETS: HS392220			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	United Kingdom	0.85	1029.28%	1	China	1.57	9.64%
2	Namibia	0.48	68.15%	2	Italy	0.20	33.75%
3	Germany	0.20	-	3	Taiwan	0.07	-
4	Italy	0.05	-	4	Germany	0.05	-
5	Botswana	0.03	41.48%	5	Austria	0.01	-
6	Angola	0.02	-2.77%	6	Kenya	0.01	-
7	Zambia	0.01	1.73%	7	Netherlands	0.00	-
8	Nigeria	0.01	-	8	India	0.00	-
9	Lesotho	0.00	303.40%	9	United Kingdom	0.00	-
10	Kenya	0.00	-	10	United States	0.00	793.36%

Source: Quantec, 2021

### 3.4 WESTERN CAPE TRADE OF HST392290: - Baths, shower-baths, sinks, wash-basins, bidets, lavatory pans, seats and covers, flushing cisterns and similar sanitary ware, of plastics – (Other).

The graph below shows the trade flows of HS392290 as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net exporter of HS392290 for most of the period 2011 to 2020, besides in 2012 and 2018 where it experienced a trade deficit of ZAR4.74m and ZAR0.89m, respectively. Total exports of HS392290 far exceeded imports for most of the period analysed. Moreover, total exports rose from ZAR4.39m in 2011 to ZAR6.83m by 2020. Albeit from a lower base, import costs of product HS392290 increased slightly over the period, from ZAR2.35m in 2011 to ZAR2.72m in 2020. The net effect being a doubling of the trade surplus, from ZAR2.04m in 2011 to ZAR4.11m by 2020. Furthermore, exports of HS392290 increased at an average rate of 26.99% per annum over the period, while imports of HS392290 experienced an average annual growth rate of 19.16% from 2011 to 2020.



Source: Quantec, 2021

The table below shows the Western Cape's top import and export markets of product HS392290. From the table it is clear that United Kingdom was the top export market with a value of ZAR0.85m in 2020. Namibia, with exports totalling ZAR0.48m, followed in second position, and Germany trailed in third place with total exports reaching ZAR0.20m in 2020. Furthermore, China was the top market for Western Cape imports of product HS392290, with imports of ZAR1.57m in 2020. Following in second place was Taiwan (ZAR0.20m), and Singapore in third, with imports reaching ZAR0.07m in 2020.

The United Kingdom was the fastest growing destination market for Western Cape exports of HS392290, reporting an average annual growth in exports of 1029.28% from 2011 to 2020. Lesotho was the second highest growth market (303.40%), followed by Namibia which lagged far behind in third place, reaching an average growth of 68.15% per annum from 2011 to 2020. In contrast, the United States was the Western Cape's highest growing import market, reporting an average annual rate of 793.36% per annum from 2011 to 2020. Italy followed in second position, reaching an average rate of 33.75% per annum, while imports of HS392290 from China grew at 9.64% per annum from 2011 to 2020.

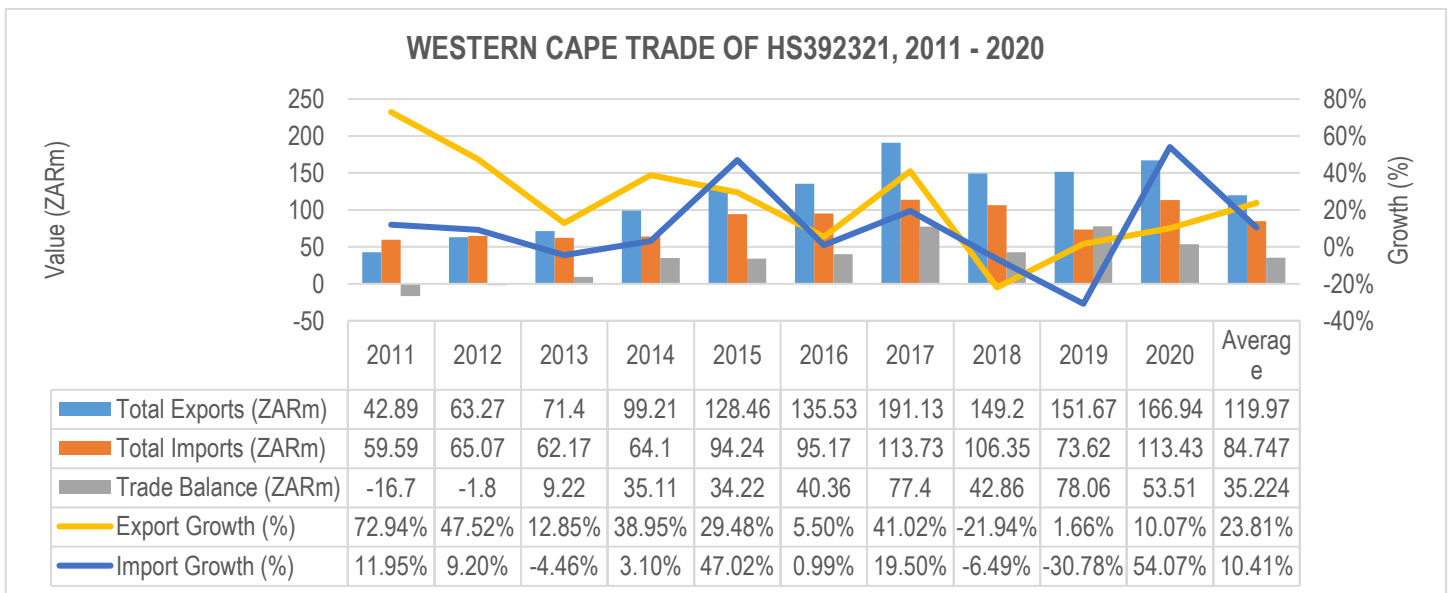
TOP WC EXPORT MARKETS: HS392290				TOP WC IMPORT MARKETS: HS392290			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Namibia	4.24	41.46%	1	China	1.65	46.79%

2	United Arab Emirates	1.06	-	2	Poland	0.36	-
3	Botswana	0.72	156.48%	3	Italy	0.18	26.08%
4	Kenya	0.11	-	4	Vietnam	0.16	-
5	Zimbabwe	0.10	180.08%	5	Turkey	0.12	-
6	Malawi	0.08	143.99%	6	Germany	0.06	130.92%
7	Lesotho	0.07	203.29%	7	Sweden	0.05	-
8	Mauritius	0.07	-	8	United Kingdom	0.04	498.43%
9	France	0.04	-	9	Taiwan	0.03	77.19%
10	Zambia	0.03	119.07%	10	Portugal	0.02	-

Source: Quantec, 2021

### 3.5 WESTERN CAPE TRADE OF HST392321: - Articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics HST392321 – (Of polymers of ethylene).

The graph below shows the trade flows of HS392321 as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net exporter of HS392321 for most of the period 2011 to 2020, besides in 2011 and 2012 where it experienced a trade deficit of ZAR16.7m and ZAR1.8m, respectively. Total exports of HS392321 grew exponentially over the period, from ZAR42.89m in 2011 to ZAR166.94m by 2020. In comparison, import costs of product HS392321 increased similarly over the period, from ZAR59.59m in 2011 to ZAR113.43m in 2020. The net effect being a switch of the trade balance, from a deficit of ZAR16.7m in 2011 to a surplus of ZAR53.51m by 2020. Furthermore, exports of HS392321 grew at twice the rate of imports, where exports increased at an average rate of 23.81% per annum over the period, while imports of HS392321 experienced an average annual growth rate of 10.41% from 2011 to 2020.



Source: Quantec, 2021

The table below shows the Western Cape's top import and export markets for product HS392290. From the table, it is clear that Namibia was the top export market with a value of ZAR58.43m in 2020. Australia, with exports totalling ZAR25.67m, followed in second position, and the United States trailed in third place with total exports of reaching ZAR14.65m in 2020. Furthermore, China was the top market for Western Cape imports of product HS392290, with imports of ZAR73.08m in 2020. Following in a distant second place was Germany (ZAR11.16m), and the United Kingdom in third, with imports reaching ZAR8.23m in 2020.

Moreover, China was the highest growing destination market for Western Cape exports of HS392290, reporting an average annual growth in exports of 337.60% from 2011 to 2020. Swaziland was the second highest growth market (72.18%), followed by Australia in third place, reaching an average growth of 70.94% per annum from 2011 to 2020. In contrast, Kenya was the Western Cape's highest



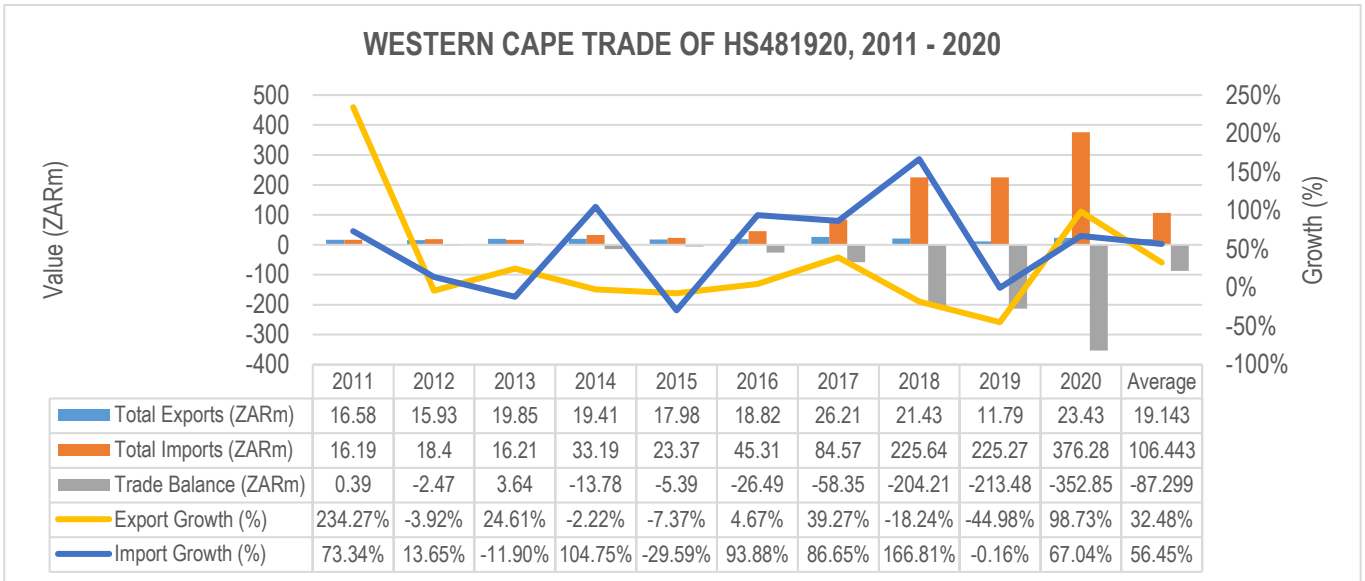
growing import market, reporting an average annual rate of 182273.68% per annum from 2011 to 2020, albeit that this was off a very low base. Spain followed in second position, reaching an average rate of 6970.73% per annum, while imports of HS392290 from the Netherlands grew at 1132.62% per annum from 2011 to 2020.

TOP WC EXPORT MARKETS: HS392321				TOP WC IMPORT MARKETS: HS392321			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Namibia	58.43	26.30%	1	China	73.08	15.23%
2	Australia	25.67	70.94%	2	Germany	11.16	251.57%
3	United States	14.65	18.82%	3	United Kingdom	8.23	119.82%
4	Netherlands	9.57	-	4	Spain	4.36	6970.73%
5	Mozambique	8.40	62.67%	5	Israel	3.42	223.14%
6	New Zealand	8.36	-	6	Brazil	2.93	-
7	China	7.21	337.60%	7	Netherlands	2.14	1132.62%
8	Swaziland	5.16	72.18%	8	United States	2.14	184.05%
9	Zambia	4.48	22.95%	9	Kenya	1.82	182273.69%
10	India	3.95	-	10	Vietnam	0.72	-

Source: Quantec, 2021

**3.6 WESTERN CAPE TRADE OF HST481920:** - Cartons, boxes, cases, bags and other packing containers, of paper, paperboard, cellulose wadding or webs of cellulose fibres; box files, letter trays, and similar articles, of paper or paperboard of a kind used in offices, shops or the like - (Folding cartons, boxes and cases, of non-corrugated paper or paperboard).

The graph below shows the trade flows of HS481920 as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net importer of HS481920 for most of the period 2011 to 2020, besides in 2011 and 2013 where it experienced a trade surplus of ZAR0.39m and ZAR3.64m, respectively. Total exports of HS481920, albeit rising at an average of ZAR19.14m per annum over the period, remained low and negligible compared to that of imports of product HS481920 into the Western Cape. Overall, total exports rose in value, from ZAR16.58m in 2011 to ZAR23.43m by 2020. Albeit beginning from roughly the same level as exports in 2011, imports increased sharply over the period, from ZAR16.19m in 2011 to ZAR376.28m in 2020. The net effect being a widening of the trade deficit, from a surplus of ZAR0.39m in 2011 to a deficit ZAR352.85m by 2020. Furthermore, exports of HS481920 increased at an average rate of 32.58% per annum over the period, while imports of HS481920 experienced an average annual growth rate of 56.45% from 2011 to 2020.



Source: Quantec, 2021

The table below shows the Western Cape's top import and export markets of product HS481920. From the table it is clear that Zimbabwe was the top export market with a value of ZAR12.72m in 2020. Namibia, with exports totalling ZAR3.60m, followed in a distant second position, while Mozambique trailed in third place with total exports of reaching ZAR2.51m in 2020. Furthermore, Germany was the top market for Western Cape imports of product HS481920, with imports of ZAR330.87m in 2020. Following in a distant second place was the Netherlands (ZAR20.42m), and China in third, with imports reaching ZAR14.30m in 2020.

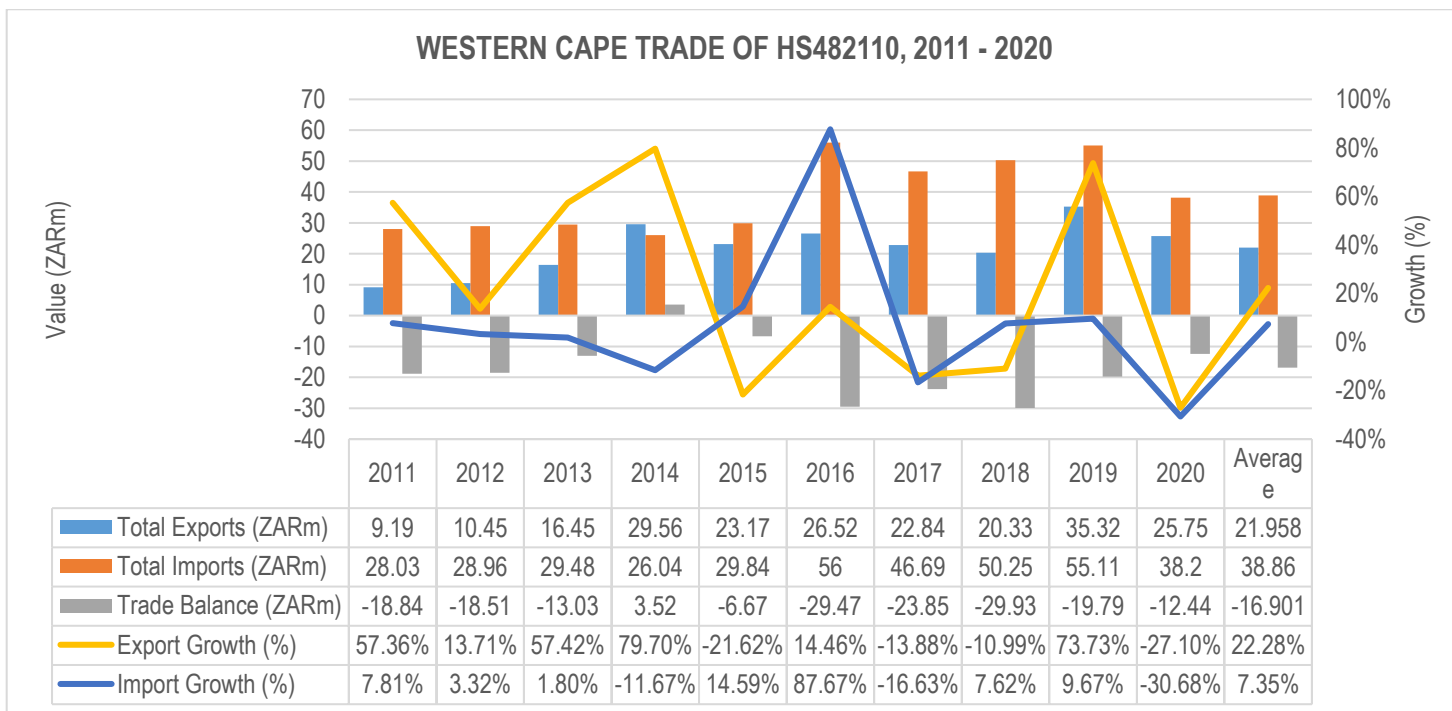
Zimbabwe was the highest growing destination market for the Western Cape's exports of HS481920, reporting an average annual growth in exports of 4374.57% from 2011 to 2020. Lesotho was the second highest growth market (463.22%), followed by Mozambique which lagged far behind in third place, reaching an average growth of 166.52% per annum from 2011 to 2020. In contrast, Turkey was the Western Cape's highest growing import market, reporting an average annual rate of 42146.05% per annum from 2011 to 2020, albeit of a low base. The Netherlands followed in second position, reaching an average rate of 12256.29% per annum, while imports of HS481920 from India grew at 1005.55% per annum from 2011 to 2020.

TOP WC EXPORT MARKETS: HS481920				TOP WC IMPORT MARKETS: HS481920			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Zimbabwe	12.72	4374.57%	1	Germany	330.87	158.87%
2	Namibia	3.60	41.87%	2	Netherlands	20.42	12256.29%
3	Mozambique	2.51	166.52%	3	China	14.30	30.97%
4	Lesotho	0.86	463.22%	4	Denmark	4.77	-
5	Mali	0.83	-	5	Italy	2.26	202.09%
6	Botswana	0.63	25.16%	6	Turkey	0.80	42146.05%
7	Zambia	0.53	59.06%	7	Vietnam	0.65	-
8	United Arab Emirates	0.45	-	8	India	0.60	1005.55%
9	Angola	0.27	42.39%	9	Namibia	0.51	-
10	Malawi	0.19	37.02%	10	United States	0.21	-2.82%

Source: Quantec, 2021

**3.7 WESTERN CAPE TRADE OF HST482110: - Paper or paperboard labels of all kinds, whether or not printed – (Printed).**

The graph below shows the trade flows of HS482110 as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net importer of HS482110 for most of the period 2011 to 2020, besides in 2014 where it experienced a trade surplus of ZAR3.52m. Total exports of HS482110, albeit rising at an average of ZAR21.95m per annum over the period, remained at nearly half of imports of the period analysed. Overall, total exports rose in value, from ZAR9.19m in 2011 to ZAR25.75m by 2020. In contrast, imports increased steadily over the period, from ZAR28.03m in 2011 to ZAR38.2m in 2020. Furthermore, exports of HS482110 increased at an average rate of 22.28% per annum over the period, while imports of HS482110 experienced an average annual growth rate of 7.35% from 2011 to 2020. The net effect being a narrowing of the trade deficit, from a deficit of ZAR18.84m in 2011 to a deficit ZAR12.44m by 2020.



Source: Quantec, 2021

Further, the table below shows the Western Cape's top import and export markets of product HS482110. From the table it is clear that Zambia was the top export market with a value of ZAR5.88m in 2020. Nigeria, with exports totalling ZAR4.38m, followed in second position, while Namibia trailed in third place with total exports of reaching ZAR4m in 2020. Furthermore, Germany was the top market for Western Cape imports of product HS482110, with imports of ZAR25.66m in 2020. Following in a distant second place was China (ZAR5.33m), and Greece in third place, with imports reaching ZAR2.94m in 2020.

Moreover, Nigeria was the highest growing destination market for Western Cape exports of HS482110, reporting an average annual growth in exports of 125.12% from 2011 to 2020. Swaziland was the second highest growth market (112.81%), followed by Zambia in third place, reaching an average growth of 79.80% per annum from 2011 to 2020. In contrast, Belgium was the Western Cape's highest growing import market, reporting an average annual rate of 1014.78% per annum from 2011 to 2020. Canada followed in second position, reaching an average rate of 143.39% per annum, while imports of HS482110 from France grew at 30.63% per annum from 2011 to 2020.

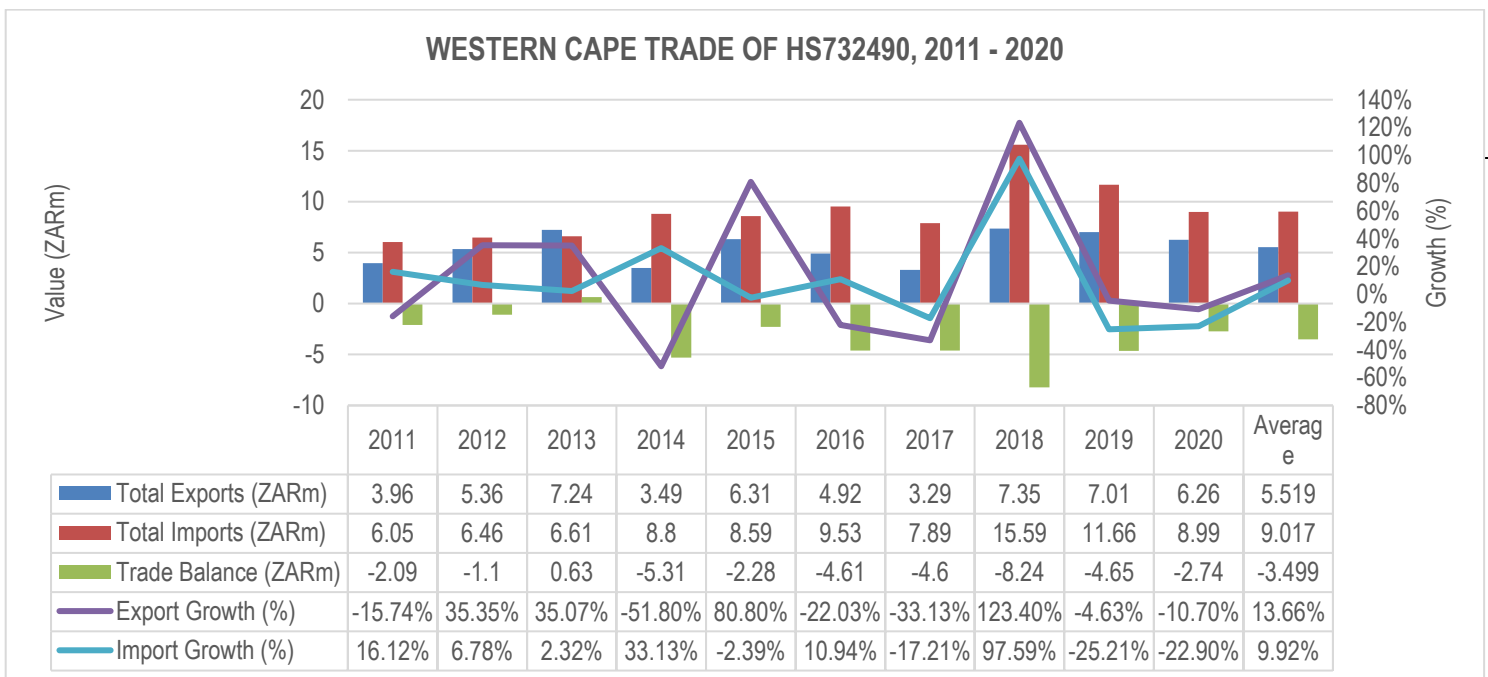
TOP WC EXPORT MARKETS: HS482110				TOP WC IMPORT MARKETS: HS482110			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Zambia	5.88	79.80%	1	Germany	25.66	16.49%
2	Nigeria	4.38	125.12%	2	China	5.33	19.76%
3	Namibia	4.00	43.85%	3	Greece	2.94	-
4	Angola	2.49	42.96%	4	Japan	0.56	-

5	Lesotho	1.65	38.90%	5	Canada	0.54	143.39%
6	Swaziland	1.45	112.81%	6	Belgium	0.51	1014.78%
7	Botswana	1.33	14.38%	7	United Kingdom	0.49	32.17%
8	Malawi	0.94	44.07%	8	United States	0.33	20.94%
9	Mauritius	0.87	37.06%	9	Denmark	0.26	-
10	Madagascar	0.81	34.36%	10	France	0.25	30.63%

Source: Quantec, 2021

### 3.8 WESTERN CAPE TRADE OF HST732490: - Sanitary ware and parts thereof, of iron or steel – (Other, including parts).

The graph below shows the trade flows of HS732490 as it relates to the Western Cape market from 2011 to 2020. From the graph it is evident that the Western Cape was a net importer of HS732490 for most of the period 2011 to 2020, besides in 2013 where it experienced a trade surplus of ZAR0.63m. Total exports of HS732490, albeit rising at an average of ZAR2.52m per annum over the period, remained at nearly half of imports of the period. Overall, total exports rose in value, from ZAR3.96m in 2011 to ZAR6.26m by 2020. In contrast, imports increased steadily over the period, from ZAR6.05m in 2011 to ZAR8.99m in 2020. Furthermore, exports of HS732490 increased at an average rate of 13.66% per annum over the period, while imports of HS732490 experienced an average annual growth rate of 9.92% from 2011 to 2020. The net effect being a slight widening of the trade deficit, from a deficit of ZAR2.09m in 2011 to a deficit ZAR2.74m by 2020



Source: Quantec, 2021

The table below shows the Western Cape's top import and export markets of product HS732490. From the table it is clear that Namibia was the top export market with a value of ZAR3.16m in 2020. Botswana, with exports totalling ZAR0.82m, followed in a distant second position, while Angola trailed in third place with total exports of reaching ZAR0.76m in 2020. Furthermore, China was the top market for Western Cape imports of product HS732490, with imports of ZAR7.54m in 2020. Following in a distant second place was Italy (ZAR0.42m), and Germany in third, with imports reaching ZAR0.39m in 2020.

Angola was the highest growing destination market for Western Cape exports of HS732490, reporting an average annual growth in exports of 272.70% from 2011 to 2020. Zimbabwe was the second highest growth market (258.05%), followed by Namibia which lagged far behind in third place, reaching an average growth of 101.63% per annum from 2011 to 2020. In contrast, Denmark was the Western Cape's highest growing import market, reporting an average annual rate of 936.10% per annum from 2011 to 2020. Spain

followed in second position, reaching an average rate of 225.33% per annum, while imports of HS732490 from Italy grew at 80.99% per annum from 2011 to 2020.

TOP WC EXPORT MARKETS: HS732490				TOP WC IMPORT MARKETS: HS732490			
RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)	RANK	COUNTRY	VALUE (ZARm), 2020	Ave growth (2011 - 2020)
1	Namibia	3.16	101.63%	1	China	7.54	10.15%
2	Botswana	0.82	85.33%	2	Italy	0.42	80.99%
3	Angola	0.76	272.70%	3	Germany	0.39	79.96%
4	Zimbabwe	0.34	258.05%	4	Netherlands	0.34	-
5	Nigeria	0.22	-	5	Australia	0.13	-
6	United States	0.15	-	6	United Kingdom	0.06	1.21%
7	United Kingdom	0.13	-	7	Brazil	0.04	-
8	Australia	0.12	-	8	Spain	0.04	225.33%
9	Tanzania	0.11	-	9	United States	0.01	-
10	Netherlands	0.10	-	10	Denmark	0.01	936.10%

Source: Quantec, 2021

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