



Report on the South African Customs Union (SACU) Dairy Intra Trade exports from South Africa to the BeLN* countries for 2024

** Botswana, eSwatini, Lesotho, Namibia*

Synopsis:

- On a mass basis, the total intra dairy exports to the BeLN countries has decreased by 8.58% between 2020 and 2024. However, although intra dairy exports in 2024 is lower than in 2020, the decreasing trend reversed in 2024, with intra dairy exports 2.40% higher than in 2023. The mass of intra dairy exports for buttermilk powder and yoghurt between 2023 and 2024 is stable with a slight increase of 5.88%, whey and whey powder intra dairy exports increased significantly (with 63.15%) while the intra dairy exports for milk concentrate and butter, butter spreads and butter oil decreased significantly with 30.57% and 21.93% respectively.
- The average free-on-board (F.O.B.) price for sales to the BeLN countries in 2024 decreased for two of the six tariff headings. The tariff headings where prices increased were milk concentrated (04.02), buttermilk powder and yoghurt (04.03), butter, butter spreads and butter oil (04.05), and cheese and curd (04.06). The average free-on-board (F.O.B.) price for sales to the BeLN countries during 2023 compared to 2024 for milk, concentrated (04.02) increased the most, with 44.80% while the price for milk and cream, unsweetened (04.01) decreased the most.
- The total value of the sales has increased by 29.00% over the period between 2020 and 2024. The total value of sales between 2023 and 2024 increased with 11.17%, the value of sales for concentrated milk (04.02) moved sideways, butter, butter spreads and butter oil (04.05) decreased (14.18%) while whey and whey powder (04.04) increased the most with 50.23%.



This report was compiled by the Economic Desk of the MPO as part of the Economies and Markets project of MilkSA. A market economy is dependent on available information, evenly distributed between role players that enables the “invisible hand” to optimally distribute production factors. The objective of MilkSA and the Economic Desk of the MPO is to provide market signals and market trends to the dairy industry, organised agriculture, and policymakers, to enhance the functioning of the value chain – with a strong scientific approach.

The Economic Desk of the MPO produces several reports some as part of the Economies and Markets project of MilkSA and others as an independent market contributor focusing on supply and demand variables and dynamics, both within an international and domestic ambit. These reports embody the Industry Information Project of the MPO.

The outputs and deliberations of the Desk should assist role players in the value chain to better prepare for market developments and empower role players to engage at a higher level. While the Milk Producers’ Organisation and Milk SA cannot and will not try to predict the future in any detail, the possible general impact and/or possible outcomes of specific changes or trends will be discussed in this document. This information should not be regarded as financial advice. While this report is compiled from sources that are deemed reliable, MilkSA and the MPO cannot take responsibility for any decisions based on the information in this report.

Background

1. Typically, 75% of the combined categories, namely sales to BeLN countries together with exports, manifests as sales to the BeLN countries every year.
2. The source of the document is the South African Revue Services.
3. The report is produced quarterly with a once-off calendar year amalgamation of all the quarters.

Section 1: Intra Dairy Exports from South Africa to the BeLN countries

This section will analyse intra dairy exports per tariff heading on an annual basis.

Table 1: The mass (kg) of intra dairy exports for the period 2020 to 2024, per tariff heading is compared.

Tariff Heading	Description	2020	2021	2022	2023	2024
04.01	Milk and cream, unsweetened	66 554 489	70 823 703	66 615 733	67 875 272	78 587 741
04.02	Milk, concentrated	46 168 799	41 751 506	36 556 346	34 806 486	24 165 861
04.03	Buttermilk powder, yoghurt	26 065 989	24 485 179	23 431 712	20 085 206	21 266 900
04.04	Whey, whey powder, etc	3 931 149	3344211	3 067 708	2 538 149	4 141 066
04.05	Butter, butter spreads and butter oil	1 189 318	1543004	1 828 965	2 025 637	1 581 391
04.06	Cheese and curd	5 739 180	5 682 357	6 838 854	6 278 434	7 072 458
	Total	149 648 924	147 907 621	138 339 318	133 609 184	136 815 417

Table 2: The average F.O.B. (ZAR) price of intra dairy exports for the period 2020 to 2024, per tariff heading is compared.

Tariff Heading	Description	2020	2021	2022	2023	2024
04.01	Milk and cream, unsweetened	8.71	9.43	10.10	11.77	11.42
04.02	Milk, concentrated	11.19	12.44	11.72	12.21	17.68
04.03	Buttermilk powder, yoghurt	14.84	15.38	16.58	19.66	22.36
04.04	Whey, whey powder, etc	8.96	8.90	11.08	13.34	13.02
04.05	Butter, butter spreads and butter oil	56.16	47.94	49.36	52.12	57.30
04.06	Cheese and curd	58.75	63.69	63.02	75.25	75.65

Table 3: Value of sales (R) to BeLN countries per tariff heading: The value of the sales for the period 2020 to 2024 is compared.

Tariff Heading	Description	2020	2021	2022	2023	2024
04.01	Milk and cream, unsweetened	579 725 965	668 091 377	672 117 035	798 756 998	897 397 423
04.02	Milk, concentrated	516 673 459	519 369 791	428 575 283	425 154 074	427 292 982
04.03	Buttermilk powder, yoghurt	386 763 857	376 697 270	388 505 485	394 821 730	475 565 848
04.04	Whey, whey powder, etc	35 223 617	29751505	33 986 987	33 864 663	53 924 220
04.05	Butter, butter spreads and butter oil	66 791 496	73973055	90 285 157	105 584 690	90 608 572
04.06	Cheese and curd	337 148 833	361 924 141	431 006 606	472 458 472	535 037 796
	Total	1 922 327 227	2 037 792 891	2 044 476 553	2 230 640 627	2 479 826 841

- On a mass basis, the total intra dairy exports to the BeLN countries has decreased by 8.58% between 2020 and 2024. However, although intra dairy exports in 2024 is lower than in 2020, the decreasing trend reversed in 2024, with intra dairy exports 2.40% higher than in 2023.
- The average free-on-board (F.O.B.) price for sales to the BeLN countries in 2024 decreased for two of the six tariff headings. The tariff headings where prices increased were milk concentrated (04.02), buttermilk powder and yoghurt (04.03), butter, butter spreads and butter oil (04.05), and cheese and curd (04.06). .
- The total value of the sales has increased by 29.00% over the period between 2020 and 2024.

Table 4: The mass (kg) of intra dairy exports for the period 2024, per tariff heading, is compared to 2023.

Tariff Heading	Description	2024	2023	% change
04.01	Milk and cream, unsweetened	78 587 741	67 875 272	15.78
04.02	Milk, concentrated	24 165 861	34 806 486	-30.57
04.03	Buttermilk powder, yoghurt	21 266 900	20 085 206	5.88
04.04	Whey, whey powder, etc	4 141 066	2 538 149	63.15
04.05	Butter, butter spreads and butter oil	1 581 391	2 025 637	-21.93
04.06	Cheese and curd	7 072 458	6 278 434	12.65
	Total	136 815 417	133 609 184	2.40

- The mass of intra dairy exports for buttermilk powder and yoghurt between 2023 and 2024 is stable with a slight increase of 5.88%, whey and whey powder intra dairy exports increased significantly (with 63.15%) while the intra dairy exports for milk concentrate and butter, butter spreads and butter oil decreased significantly with 30.57% and 21.93% respectively.

Table 5: The average F.O.B. (ZAR) price for 2024, per tariff heading, is compared to 2023.

Tariff Heading	Description	2024	2023	% change
04.01	Milk and cream, unsweetened	11.42	11.77	-2.97
04.02	Milk, concentrated	17.68	12.21	44.80
04.03	Buttermilk powder, yoghurt	22.36	19.66	13.73
04.04	Whey, whey powder, etc	13.02	13.34	-2.40
04.05	Butter, butter spreads and butter oil	57.30	52.12	9.94
04.06	Cheese and curd	75.65	75.25	0.53.

- The average free-on-board (F.O.B.) price for sales to the BeLN countries during 2023 compared to 2024 for milk, concentrated (04.02) increased the most, with 44.80% while the price for milk and cream, unsweetened (04.01) decreased the most.

Table 6: Value of sales (R) to BeLN countries per tariff heading: The value of the sales for 2024, is compared to 2023.

Tariff Heading	Description	2024	2023	% change
04.01	Milk and cream, sweetened	897 397 423	798 756 998	12.35
04.02	Milk, concentrated	427 292 982	425 154 074	0.50
04.03	Buttermilk powder, yoghurt	475 565 848	394 821 730	20.45
04.04	Whey, whey powder, etc	53 924 220	33 864 663	59.23
04.05	Butter, butter spreads and butter oil	90 608 572	105 584 690	-14.18
04.06	Cheese and curd	535 037 796	472 458 472	13.25
	Total	2 479 826 841	2 230 640 627	11.17

- The total value of sales between 2023 and 2024 increased with 11.17%, the value of sales for concentrated milk (04.02) moved sideways, butter, butter spreads and butter oil (04.05) decreased (14.18%) while whey and whey powder (04.04) increased the most with 59.23%.

Sections 2 to 7 will analyse sales per tariff heading to BeLN countries

Section 2: Sales of tariff heading 04.01 to the BeLN countries: Milk and cream, unsweetened.

Table 7: Sales for tariff heading 0401: Milk and cream, unsweetened.

The mass (kg) of sales for 2024, is compared to 2023, on a per BeLN country basis.

Country	2024	2023	% change
Botswana	35 610 105	24 922 561	42.88
Eswatini	14 459 465	16 245 677	-10.99
Lesotho	11 264 233	11 063 513	1.81
Namibia	17 253 938	15 643 521	10.29
Total	78 587 741	67 875 272	15.78

Table 8: Average F.O.B. (ZAR) price for tariff heading 0401: The average F.O.B. price for sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	7.76	8.81	-11.92
Eswatini	11.41	10.62	7.44
Lesotho	19.34	16.82	14.98
Namibia	13.81	14.10	-2.06
Average	11.42	11.77	-2.97

Table 9: Value of sales (R) for tariff heading 0401: The value of sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	276 346 966	219 450 478	25.93
Eswatini	164 961 814	172 561 166	-4.40
Lesotho	217 894 613	186 130 569	17.07
Namibia	238 194 030	220 614 785	7.97
Total	897 397 423	798 756 998	12.35

- Between 2023 and 2024, only the mass of sales of milk and cream unsweetened (04.01) to Eswatini decreased with sales growth to Botswana increasing the most at 42.88%. Over the same period, the FOB price to Botswana decreased with 11.92% while the price to Lesotho increased the most at 14.98%. The value of sales to Botswana increased the most (25.93%), while the value of sales to Eswatini decreased with 4.40%.

Section 3: Sales of tariff heading 04.02 to the BeLN countries: Milk concentrated.

Table 10: Sales for tariff heading 0402: Milk, concentrated.

The mass (kg) of sales for 2024, is compared to 2023, on a per BeLN country basis.

Country	2024	2023	% change
Botswana	20 250 912	30 600 516	-33.82
Eswatini	1 062 225	976 446	8.78
Lesotho	392 931	448 244	-12.34
Namibia	2 459 794	2 781 280	-11.56
Total	24 165 861	34 806 486	-30.57

Table 11: Average F.O.B. (ZAR) price for tariff heading 0402: The average F.O.B. price for sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	8.79	7.61	15.51
Eswatini	80.46	73.11	10.05
Lesotho	91.85	62.26	47.53
Namibia	51.94	33.38	55.60
Average	17.68	12.21	44.80

Table 12: Value of sales (R) for tariff heading 0402: The value of sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	177 981 829	233 006 996	-23.62
Eswatini	85 466 343	71 392 334	19.71
Lesotho	36 090 019	27 907 266	29.32
Namibia	127 754 791	92 847 478	37.60
Total	427 292 982	425 154 074	0.50

- Between 2023 and 2024, only the mass of sales of concentrated milk (04.02) to Eswatini increased while negative sales growth to Botswana registered the most at 33.82%. The average sales growth came in at -30.57%. Over the same period, the FOB price to Namibia increased the most at 55.60% while the price to Eswatini increased the least at 10.05%. The value of sales to Botswana decreased the most (23.62%), while the value of sales to Namibia increased the most with 37.60%.

Section 4: Sales of tariff heading 04.03 to the BeLN countries: Buttermilk powder and yoghurt.

Table 13: Sales for tariff heading 0403: Buttermilk powder, yoghurt.

The mass (kg) of sales for 2024, is compared to 2023, on a per BeLN country basis.

Country	2024	2023	% change
Botswana	11 218 986	10 282 276	9.11
Eswatini	4 291 317	4 261 866	0.69
Lesotho	1 885 556	1 829 581	3.05
Namibia	3 871 041	3 711 484	4.30
Total	21 266 900	20 085 206	5.88

Table 14: Average F.O.B. (ZAR) price for tariff heading 0403: The average F.O.B. price for sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	21.42	19.57	9.45
Eswatini	20.12	17.88	15.53
Lesotho	29.96	18.41	62.74
Namibia	23.87	22.54	5.90
Average	22.36	19.66	13.73

Table 15: Value of sales (R) for tariff heading 0403: The value of sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	240 325 780	201 273 872	19.40
Eswatini	86 326 161	76 186 055	13.31
Lesotho	56 496 360	33 691 707	67.69
Namibia	92 417 547	83 670 096	10.45
Total	475 565 848	394 821 730	20.45

- Between 2023 and 2024, the mass of sales of buttermilk powder and yoghurt (04.03) increased to all the BeLN countries with the average sales growth at 5.88%. Over the same period, the FOB price to Lesotho increased the most with 62.74% while the price to Namibia increased the least at 5.90%. The value of sales to Lesotho increased the most (67.69%).

Section 5: Sales of tariff heading 04.04 to the BeLN countries: Whey and whey powder etc.

Table 16: Sales for tariff heading 0404: Whey, whey powder, etc.

The mass (kg) of sales for 2024, is compared to 2023, on a per BeLN country basis.

Country	2024	2023	% change
Botswana	318 404	325 941	-2.31
Eswatini	1 147 961	625 065	83.60
Lesotho	1 800 939	1 034 374	74.11
Namibia	873 762	552 769	58.07
Total	4 141 066	2 538 149	63.15

Table 17: Average F.O.B. (ZAR) price for tariff heading 0404: The average F.O.B. price for sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	22.79	23.15	-1.56
Eswatini	10.54	16.18	-34.86
Lesotho	14.80	10.68	38.58
Namibia	9.06	9.33	-2.89
Average	13.02	13.34	-2.40

Table 18: Value of sales (R) for tariff heading 0404: The value of sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	7 256 381	7 544 284	-3.82
Eswatini	12 103 578	10 115 685	19.65
Lesotho	26 645 373	11 047 014	141.20
Namibia	7 918 888	5 157 680	53.54
Total	53 924 220	33 864 663	59.23

- Between 2023 and 2024, the mass of sales of whey and whey powder (04.04) increased significantly to all the BeLN countries, except for Botswana where a decrease of 2.31% occurred. Over the same period, the FOB price to Lesotho increased the most with 38.58% while the price to Eswatini decreased the most at 34.86%. The value of sales to Lesotho increased the most (141.20%) with the average value of sales increasing with 59.23%.

Section 6: Sales of tariff heading 04.05 to the BeLN countries: Butter, butter spreads and butter oil.

Table 19: Sales for tariff heading 0405: Butter, butter spreads and butter oil.

The mass (kg) of sales for 2024, is compared to 2023, on a per BeLN country basis.

Country	2024	2023	% change
Botswana	517 411	529 617	-2.30
Eswatini	74 329	39 422	88.55
Lesotho	216 313	181 542	19.21
Namibia	773 338	1 275 057	-39.35
Total	1 581 391	2 025 637	-21.93

Table 20: Average F.O.B. (ZAR) price for tariff heading 0405: The average F.O.B. price for sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	55.29	53.49	3.37
Eswatini	40.56	71.45	-43.23
Lesotho	54.23	28.76	88.56
Namibia	61.11	54.28	12.58
Average	57.30	52.12	9.94

Table 21: Value of sales (R) for tariff heading 0405: The value of sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	28 608 018	28 330 957	0.98
Eswatini	3 014 600	2 816 807	7.02
Lesotho	11 729 624	5 221 826	124.63
Namibia	47 256 330	69 215 100	-31.73
Total	90 608 572	105 584 690	-14.18

- Between 2023 and 2024, the mass of sales of butter, butter spreads and butter oil (04.05) are a mixed bag of increased sales to Eswatini and Lesotho while sales to Botswana and Namibia reduced. Over the same period, the FOB price to Eswatini decreased with 43.23% with the rest registering increased prices with Lesotho increasing the most at 88.56%. The value of sales to Lesotho increasing the most (124.63%) with the average sales value reducing with 14.18%.

Section 7: Sales of tariff heading 04.06 to the BeLN countries: Cheese and curd.

Table 22: Sales for tariff heading 0406: Cheese and curd.

The mass (kg) of sales for 2024, is compared to 2023, on a per BeLN country basis.

Country	2024	2023	% change
Botswana	2 143 198	1 964 212	9.11
Eswatini	794 456	725 566	9.49
Lesotho	790 087	594 589	32.88
Namibia	3 344 717	2 994 068	11.71
Total	7 072 458	6 278 434	12.65

Table 23: Average F.O.B. (ZAR) price for tariff heading 0406: The average F.O.B. price for sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	69.77	67.31	3.65
Eswatini	81.60	79.84	2.20
Lesotho	39.78	45.19	-11.97
Namibia	86.48	85.32	1.36
Average	75.65	75.25	0.53

Table 24: Value of sales (R) for tariff heading 0406: The value of sales for 2024, is compared to 2023.

Country	2024	2023	% change
Botswana	149 524 508	132 212 215	13.09
Eswatini	64 829 852	57 926 181	11.92
Lesotho	31 433 033	26 870 892	16.98
Namibia	289 250 403	255 449 184	13.23
Total	535 037 796	472 458 472	13.25

- Between 2023 and 2024, the mass of sales of cheese and curd (04.06) increased to all the BeLN countries with the average mass of sales increasing by 12.65%. Sales to Lesotho increase the most with 32.88%. Over the same period, the FOB price to Lesotho decreased the with 11.97% while the price to the other countries increased. The average value of sales to the BeLN countries increased by 13.25%.

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