GAIN ALIGNMENT

IMPLEMENTATION OF GAIN STRATEGY

GAIN

ALIGNMENT

Regulatory Bottlenecks and Pharmaceuticals

Priority Action	Target	Responsible Branch	Progress Update	APP Output Indicator
Identify and remove obstacles that delay infrastructure and address regulatory bottlenecks through an Omnibus Bill	September 2026	Regulation	The Patents Act, Designs Act, the Copyright Act, Investment Act and the Minerals and Petroleum Resources Development Act are targeted since they they will address the ease of doing business, reduce red tape and improve the ranking of SA in the World Bank Ease of Doing Business rankings.	Number of Final Omnibus Bills tabled
Implement immediate steps to prevent further job losses and deindustrialisation in the steel, ferro-chrome, Cement, auto and **pharmaceutical** sectors		Sectors	**Pharmaceuticals:** interventions- Engagement with companies affected, establishment of an inter-departmental committee for the development of a roadmap. Draft Roadmap, currently being finalized.	Not in the APP

Steel Sector Interventions

Priority Action	Timeframe	Responsible Branch	Progress Update	APP Output Indicator
Implement immediate steps to prevent further job losses and deindustrialisation in the **steel**, ferro-chrome, Cement, auto and pharmaceutical sectors	December 2025	Sectors	**Steel:** Engagement with companies affected, establishment of an inter-departmental committee for the development of a roadmap. Draft Roadmap, currently being finalized. To date over 10 trade measures reports ranging from safeguards, tariff investigations, rebates and antidumping have been processed, some in implementation and others are under consideration to support the steel industry. Work is underway with International Trade Administration Commission (ITAC) to enhance trade remedies and address circumvention weaknesses. This include implementation of the global steel tariff review as well as the introduction of an import surveillance system for high-risk products already identified and application of import controls under section 6 of the ITA Act. The Department is engaging with partner organisations including the Industrial Development Corporation (IDC), Department of Electricity and Energy, Eskom, Department of Transport and Transnet to address the structural cost challenges confronting the sector.	Percentage reduction of inputs costs (electricity pricing) to address structural constraints in the steel industry Percentage reduction of inputs costs (iron ore) to address structural constraints in the steel industry

Autos and Cement Sector Interventions

Priority Action	Timeframe	Responsible Branch	Progress Update	APP Output Indicator
Implement immediate steps to prevent further job losses and deindustrialisation in the steel, ferro-chrome, Cement, **auto** and pharmaceutical sectors	December 2025	Sectors	**Autos:** Immediate and short-term policy interventions such as the ad valorem tax structure review are being developed through the SAAM 2035 Review to support industry sustainability and employment.	Percentage increase in import tariffs on LCV's Percentage increase of production in the local manufacturing of vehicles through the review of ad valorem tax
Implement immediate steps to prevent further job losses and deindustrialisation in the steel, ferro-chrome, **Cement**, auto and pharmaceutical sectors	December 2025	Sectors	**Cement:** Cement designation proposal prepared and submitted Accounting Officer Proposed local content thresholds (inception report) developed and consulted with key stakeholders	Percentage increase in capacity utilisation in the cement industry

Focused Industrial Policy Strategy

Priority Action	Timeframe	Responsible Branch	Progress Update	APP Output Indicator
Focused industrial policy strategy that consolidates existing sectors and pursues new growth sectors by providing enablers for growth and reducing barriers to investment	February 2026	Sectors	The revised Industrial Development Strategy (IDS) was approved by Cabinet on 12 May 2026. Implementation of interventions are on-going. President will chair the Implementation Committee, and an Inter Ministerial Committee is in the process of being established.	Percentage (%) increase in domestic manufacturing growth

Sector Masterplans: Sugar, Hemp and Cannabis

Priority Action	Timeframe	Responsible Branch	Progress Update	APP Output Indicator
Implementation of sector masterplans in labour-intensive sectors such as Green Economy (SAREM and JETIP), Digital and Tech, Social Economy (ECD), **Cannabis and Hemp**, Oceans Economy, Pharmaceuticals and Global Business Services	Ongoing	Sectors and Exports	**Sugar:** Phase 2 of the Sugarcane Value Chain Master Plan was signed on 10 April 2026, with governance structures established, implementation task teams operationalised, stakeholder engagements underway, and local procurement and market-retention measures continuing to support sector competitiveness, transformation and sustainability. The liquidation of Tongaat Hulett was successfully averted,	Percentage increase in the local sugar procurement by domestic buyers
			Hemp & Cannabis: The dtic has commenced drafting an overarching cannabis bill to establish a single, coherent regulatory framework, while the Draft Cannabis Commercial Policy is in its final stages and undergoing further refinement. During Q1, hemp exports reached 2,466.29 kg (valued at R4.05 million) and cannabis exports 940.06 kg (valued at R3.78 million), with key export markets including Australia, Switzerland and Namibia, alongside processing machinery exports valued at R1.09 billion.	Increase the export growth of the Cannabis Industry by 12% per annum Rand value of South African cannabis exports

Sector Masterplans: Green Economy and Med Tech

Priority Action	Timeframe	Responsible Department	Progress Update	Impact
Implementation of sector masterplans in labour-intensive sectors such as **Green Economy (SAREM and JETIP**), Digital and Tech, Social Economy (ECD), Cannabis and Hemp, Oceans Economy, Pharmaceuticals and Global Business Services	Ongoing	Sectors and ISID	Master Plan is for the Med Tech industry 1. Market development – finalization of work related to understanding imports with the intention of matching capability for localization, domestic, procurement and exports, working on med tech specific marketing event/expo in 2027, export marketing at Global Health in Saudi Arabia, funding for exhibitions (WHX Africa) etc 2. RDI & data – development of a portal conceptualization of an innovation accelerator and med tech challenge 3. Regulatory – stand alone SAHPRA Bill, include Med tech, SAHPRA capacity 4. Skills development – med tech data development, mapping out skills framework	Rand value of funding and investment mobilised for industrial decarbonisation projects and programmes Percentage growth in the value of domestic renewable energy component manufacturing Development of an incentive package to attract one EV battery assembly manufacturer Number of renewable energy projects facilitated towards implementation through the resolution of regulatory constraints

Sector Masterplans: Digital and Tech

Priority Action	Timeframe	Responsible Department	Progress Update	Impact
Implementation of sector masterplans in labour-intensive sectors such as Green Economy (SAREM and JETIP), **Digital and Tech**, Social Economy (ECD), Cannabis and Hemp, Oceans Economy, Pharmaceuticals and Global Business Services	Ongoing	Incentives	Revised GBS Incentive guideline completed, awaiting budget allocation and final stakeholder engages for approval. Additional funding was allocated and used to settle outstanding GBS incentive claims for the 2024-25 FY. Annual Applications for the 2025-26 FY approved in Jun 2026. In line with the GBS Masterplan the partners (BPESA & Harambee) have completed the following studies; Whitepaper – AI's Impact on GBS, Handbook on employing youth with disabilities, to mention a few.	5 000 new jobs created through the digital economy programme (GBS)

Mergers and Acquisitions Approvals

Priority Action	Timeframe	Responsible Department	Progress Update	APP Output Indicator
Competition Commission to approve mergers and acquisitions within 3-6 months of applications being submitted (Phase 1 and 2)	March 2026	Competition and Transformation	The revised Merger Thresholds for notification has been implemented effective 1 May 2026 to improve ease of doing business in South Africa by reducing the proportion of Mergers and Acquisitions transactions that require notification. This aims to reduce compliance burden on business with a lower number of transactions requiring notification as well as shortening the turnaround times.	Not in the APP

Critical Minerals and Metals Strategy

Priority Action	Timeframe	Responsible Branch	Progress Update	APP Output Indicator
Implement the Critical Minerals and Metals Strategy to promote exploration, production and beneficiation of these minerals to boost investment and exports	March 2026	Sectors	• Implementation of the six pillars is progressing according to schedule, with financing successfully secured for 80% of the designated programmes. **Pillar 1: Geoscience Mapping and Exploration** **Programme 1.1: Increase geological mapping at 1:50 000 scale.** • The program began with a baseline of 5% and has progressed cumulatively to 16% • The Council for Geoscience (CGS) has made progress towards achieving the 3% geoscience mapping target. The fieldwork for data collection and processing, which typically spans one year, is currently progressing according to schedule. • Exploration activities for critical minerals is taking place in the following provinces; Northern Cape (NC), Limpopo (LP), KwaZulu-Natal (KZN), and Mpumalanga (MP) • R 22. 5 million has been spent of the R150 million has been budgeted for mapping programme for this financial year **Pillar 1: Geoscience Mapping and Exploration** **Programme 1.2: Expand JMEF to support critical minerals.** • R400 million initial capital secured through government and IDC partnership. • Anglo American pledged R600 million • 15 critical minerals projects supported across South Africa • R390 million successfully deployed to advance exploration activities. **Pillar 6: Regulatory & Policy Framework** Programme 6.1: Harmonise Mineral Licensing Regulations • The Department of Mineral Petroleum and Resources (DMPR) and the Department of Forestry, Fisheries and the Environment (DFFE) have established a collaborative framework to seamlessly integrate environmental law and mining law.	Percentage increase (%) of global market for value-added minerals

Critical Minerals Beneficiation

Priority Action	Timeframe	Responsible Branch	Progress Update	APP Output Indicator
Implement the Critical Minerals and Metals Strategy to promote exploration, production and beneficiation of these minerals to boost investment and exports	March 2026	Sectors	**Critical Minerals** • Interdepartmental Technical Working Group (TWG) on Beneficiation constituted to coordinate implementation . • TWG met 29 May 2026 at the IDC and finalised priority investment project list and beneficiation opportunities map. • Priority mineral value chains (including lithium, manganese, nickel, vanadium, rare earth elements and PGMs) identified for targeted interventions. • Work is underway to align policy instruments, financing mechanisms and infrastructure support with strategy objectives.	Percentage increase (%) of global market for value-added minerals

Special Economic Zones

Priority Action	Timeframe	Responsible Branch	Progress Update	APP Output Indicator
Targeting specific SEZs to accelerate industrial development and process minerals	2026/27	ISID and Incentives	1. Minister has designated the Fetakgomo-Tubatse Special Economic Zone in terms of sec 24(1) of the Special Economic Zones Act No. 16 of 2014 through a gazette issued on 22 May 2026 (Gazette Notice No.: 54718). The SEZ will focus on mining and agricultural inputs manufacturing, mineral and agricultural beneficiation, general manufacturing, renewable energy and logistics. It is in the Sekhukhune District in the Limpopo province covering a total of 1 000 hectares of land, an area with the world's largest deposits of platinum and chrome. The region is dominated by heavy industry and large-scale mining operations, creating a continuous demand for technical expertise, mining equipment and support services. 2.Heavy construction has commenced of Nyanza Light Metals complex within the Richards Bay Industrial Development Zone (RBIDZ). Instead of exporting raw minerals, this facility will process local resources into high-value titanium dioxide (TiO_2) pigment, reversing South Africa's current 100% reliance on importing this essential chemical commodity. The plant will also utilise process by-products to manufacture critical energy transition and technology materials, including Lithium Iron Phosphate (LFP) and fumed silica (SiO_2). By shifting up the value chain to advanced chemical manufacturing, this project anchors South Africa’s manufacturing self-reliance. This represents a R15 billion investment that will enable South Africa to shift away from being a purely extractive economy as it will establish localised mineral processing to unlock massive industrial value. Heavy construction has commenced at the 70-hectare site with final factory commissioning scheduled ahead of 2030. The investment will deliver significant impacts across multiple sectors: •The heavy infrastructure development phase is creating over 3,000 direct jobs at its peak. •Once fully operational, the plant will sustain up to 850 permanent, highly skilled positions, targeting local women and youth. •The deployment heavily prioritises local small, medium, and micro enterprises for secondary supply and service contracts	Number of Special Economic Zones designated to catalyse industrialisation, focusing on the New Industrial Policy Sectors Number of Special Economic Zones operationalised

Presidential Trade Task Team

Priority Action	Timeframe	Responsible Department	Progress Update	Impact
Coordinate the identification of new market opportunities across the globe by establishing a trade task team that reports directly into the Presidency comprising the Ministries of DTIC, Agriculture and Minerals	February 2026	Trade and Exports	**Input on the Establishment and Re-alignment of the Integrated Export Forum Task Team to the Presidency** 1. **Current Status & Existing Framework** the dtic has already operationalized a functional National Export Forum. • Composition: The current Forum acts as an intergovernmental collaborative platform comprising key national stakeholders—specifically the dtic and the Department of Agriculture, Department of Small Business, —alongside provincial economic department departments and Provincial Investment/Export Promotion Agencies (PIPAs). ▪ Mandate: It operates as a strategic and diagnostic mechanism to coordinate export promotion incentives, share trade information, deploy localized capacity-building programmes, and identify the specific needs of both emerging and experienced exporters to improve global competitiveness. • Reporting Cycle: Historically, the Forum meets on a quarterly basis and is structurally aligned to report directly to MINMEC (the meeting of the Minister and provincial Members of the Executive Councils). 2**. Progress on Strategic Re-Alignment & Elevation to the Presidency** In line with the directive to strengthen rapid-response mechanisms and elevate trade performance, operational efforts are actively underway to pivot the existing quarterly structure into a high-level Presidential Trade Task Team.	Number of trade barriers resolved in priority markets, including under existing trade agreements Number of economic interest strategies for key trading partners or regions implemented Rand value of South African manufactured exports to targeted markets in priority industrial policy sectors linked to trade agreement utilization Rand value of South African manufactured exports in priority industrial policy sectors linked to AfCFTA tariff utilization

Export Diversification and Trade Missions

Priority Action	Timeframe	Responsible Department	Progress Update	Impact
Develop and implement the necessary actions to access new technologies and new markets in response to tariff threats and the need to diversify exports	March 2026	Trade and Exports	Engagements ongoing with NEDLAC and Export Forum (comprising of Export Councils and Provincial Promotion Agencies) to identify non-tariffs barriers (NTBs) facing SA Exports in priority markets. This is in addition to the list of NTBs that the department is already working with partners to resolve.	Rand value of South African exports to targeted African markets by Black owned entities funded by dtic export support measures Number of economic interest strategies for key trading partners or regions implemented Number of trade barriers resolved in priority markets, including under existing trade agreements Number of Investment Framework Agreements concluded with priority trading partners
Review international trade infrastructure by re-purposing embassies into trade missions with clear targets for trade opportunities	June 2026	Exports	To advance economic diplomacy and the professionalization of the foreign service, **the dtic** is in the process of appointing Foreign Economic Representatives (FERs) and placing them in strategic and priority foreign offices to secure increased exports and investment. In this regard, following an interview process concluded in December 2025, FER designates have completed a training course with the final selection and placement of select FERs underway.	Already achieved