



the dtic Performance Report

Presentation to the Portfolio
Committee on Trade, Industry and
Competition

Q2 & Q3 Quarter Report
2025/26 Accounting Period

03 March 2026



the dtic

Department
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

the dtic - together, growing the economy

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Presentation Overview

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Presentation Overview

1. The Department has packaged the Q2 & Q3 performance briefing using a results- and outcomes-based approach.
2. The presentation provides a high-level summary of performance trends.
3. Focus is placed on key achievements, progress, and challenges recorded during the reporting period with respect to:
 - Planned outputs
 - Resources applied
 - Developmental outcomes achieved.
4. Detailed performance information (targets, indicators, milestones, variances) is provided in Annexure B & C for reference.

Global & Domestic Overview

- ❑ The outlook for global growth has been revised downward due to erratic US trade policies. The constantly changing US tariff regime is causing significant uncertainty, increasing volatility in various financial markets.
- ❑ The U. S. economy is expected to grow by 2.2% in 2026 due to supportive fiscal policy and a lower policy rate, alongside a reduction in the effects of higher trade barriers.
- ❑ In the Euro Area (Eurozone), growth is expected to remain steady at 0.9% in 2026 and at 1.2% in 2027. The euro area benefits less from the recent technology-driven investment boost.
- ❑ Lingering effects of the persistent rise in energy prices after Russia's invasion of Ukraine will continue to drag on manufacturing, with additional pressure from the real appreciation of the euro relative to currencies of countries exporting similar products.
- ❑ In Japan, growth is projected to moderate from 1.3% in 2025 to 0.8% in 2026 and 2027, respectively.

Real GDP: WB Economic Prospects Jan'26 projections

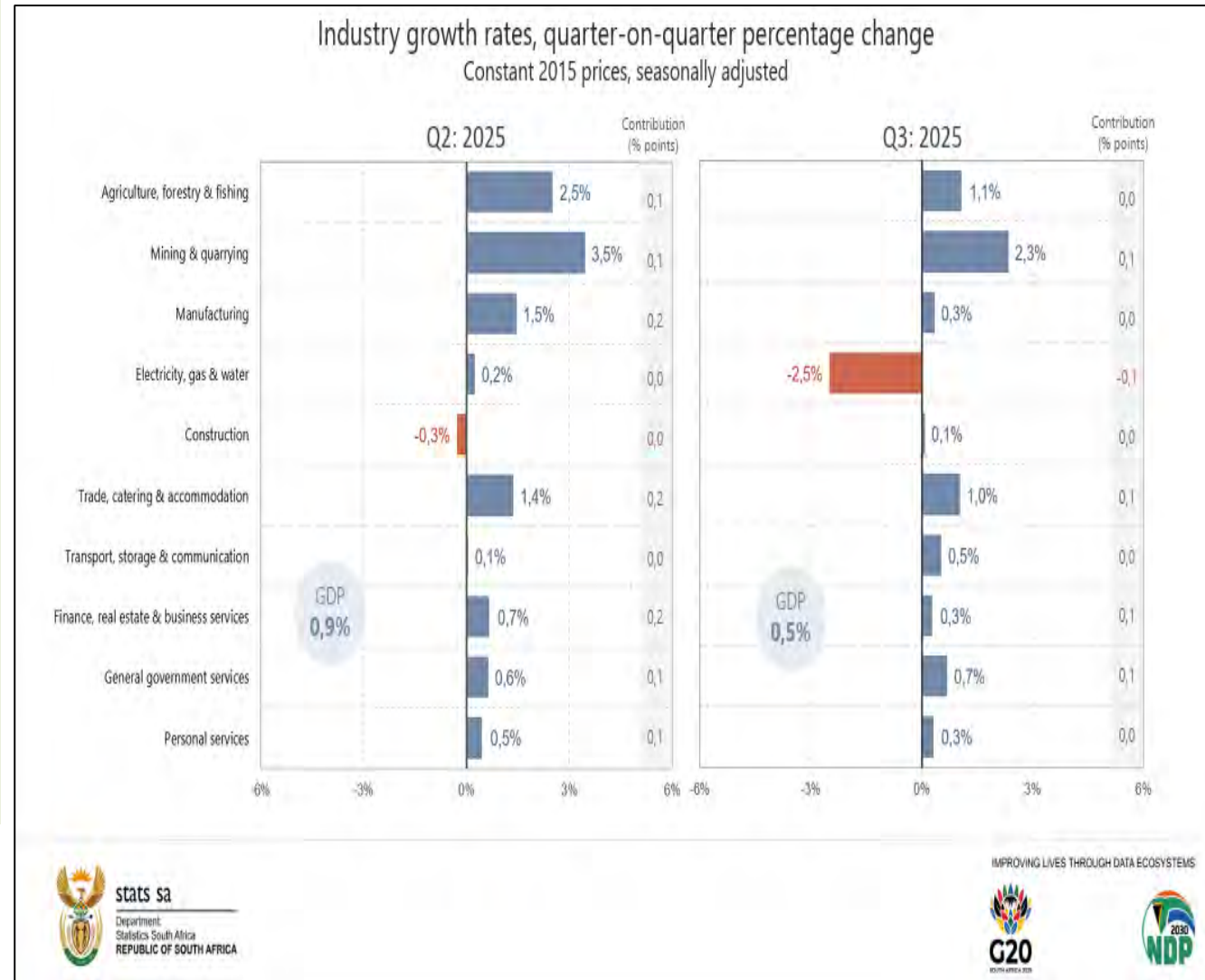
(Percent change from previous year unless indicated otherwise)

	2023	2024	2025e	2026f	2027f
World	2.8	2.8	2.7	2.6	2.7
Advanced economies	1.6	1.7	1.7	1.6	1.6
United States	2.9	2.8	2.1	2.2	1.9
Euro area	0.5	0.9	1.4	0.9	1.2
Japan	0.7	-0.2	1.3	0.8	0.8
Emerging market and developing economies	4.4	4.3	4.2	4.0	4.1
East Asia and Pacific	5.2	5.0	4.8	4.4	4.3
China	5.4	5.0	4.9	4.4	4.2
Indonesia	5.0	5.0	5.0	5.0	5.2
Thailand	2.0	2.5	2.0	1.8	2.5
Europe and Central Asia	3.6	3.6	2.4	2.4	2.7
Russian Federation	4.1	4.3	0.9	0.8	1.0
Türkiye	5.0	3.3	3.5	3.7	4.4
Poland	0.2	3.0	3.3	3.2	2.9
Latin America and the Caribbean	2.4	2.4	2.2	2.3	2.6
Brazil	3.2	3.4	2.3	2.0	2.3
Mexico	3.4	1.4	0.2	1.3	1.8
Argentina	-1.9	-1.3	4.6	4.0	4.0
Middle East, North Africa, Afghanistan and Pakistan	2.1	2.6	3.1	3.6	3.9
Saudi Arabia	0.5	2.7	3.8	4.3	4.4
Iran, Islamic Rep. ²	5.3	3.7	-1.1	-1.5	0.6
Egypt, Arab Rep. ²	3.8	2.4	4.4	4.3	4.8
South Asia	8.0	6.3	7.1	6.2	6.5
India ²	9.2	6.5	7.2	6.5	6.6
Bangladesh ²	5.8	4.2	3.7	4.6	6.1
Sri Lanka	-2.3	5.0	4.6	3.5	3.1
Sub-Saharan Africa	3.0	3.7	4.0	4.3	4.5
Nigeria	3.3	4.1	4.2	4.4	4.4
South Africa	0.7	0.6	1.3	1.4	1.5

South Africa has been singled out by the US for some of the harshest tariff threats and has been barred from receiving USAID/PEPFAR aid.

SA Economy Grows Leisurely

- ❑ The economy enjoyed steady supply of electricity in 2025 as well as efficiency gains in logistics. However, slower growth in the economy was recorded at 0.5%, lower than 0.9% in the previous quarter.
- ❑ GFCF rebounded in 2025 Q3, growing by 1.6%, following three consecutive quarters of contraction driven by public corporations (3.5%) and general government (6.6%).
- ❑ Private-sector fixed investment slowed from 3% to 0.1% in 2025 Q3.
- ❑ Public sector investment performance by contrast, benefitted from the rollout of some of the projects announced in 2024.
- ❑ The outlook for the economy seems to be moderate in the medium term, with the Reserve Bank forecasting 1.4% GDP growth in 2026, followed by 1.9% in 2027 and 2028, respectively.



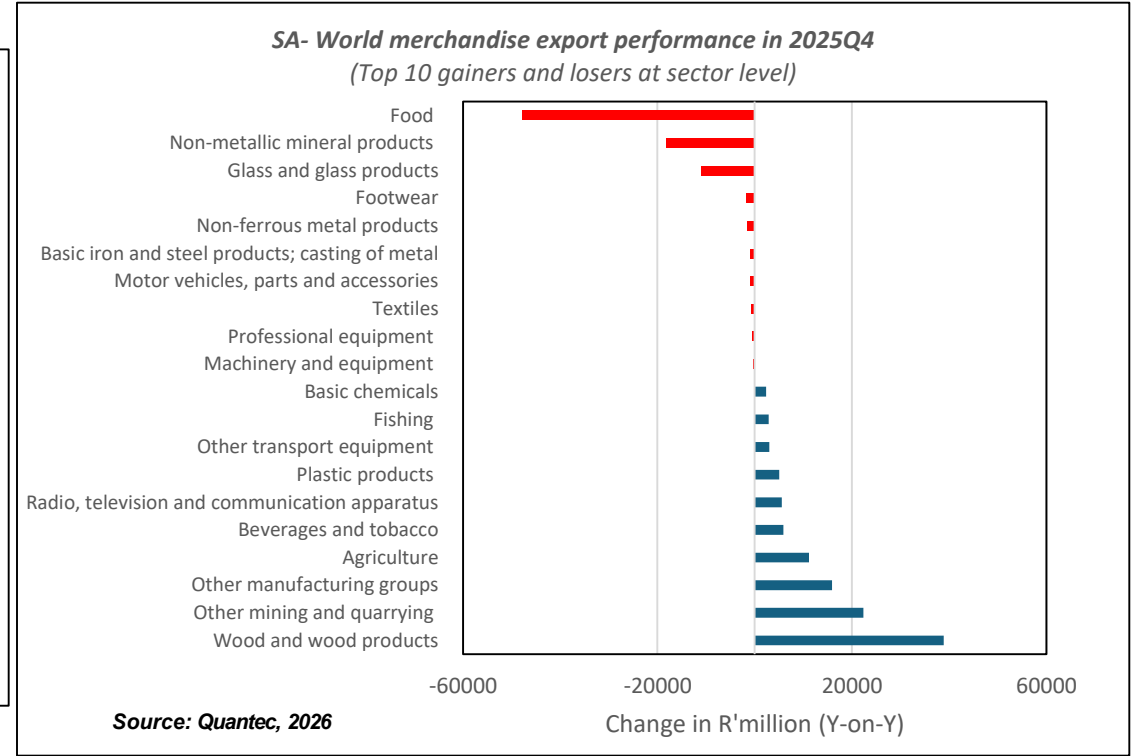
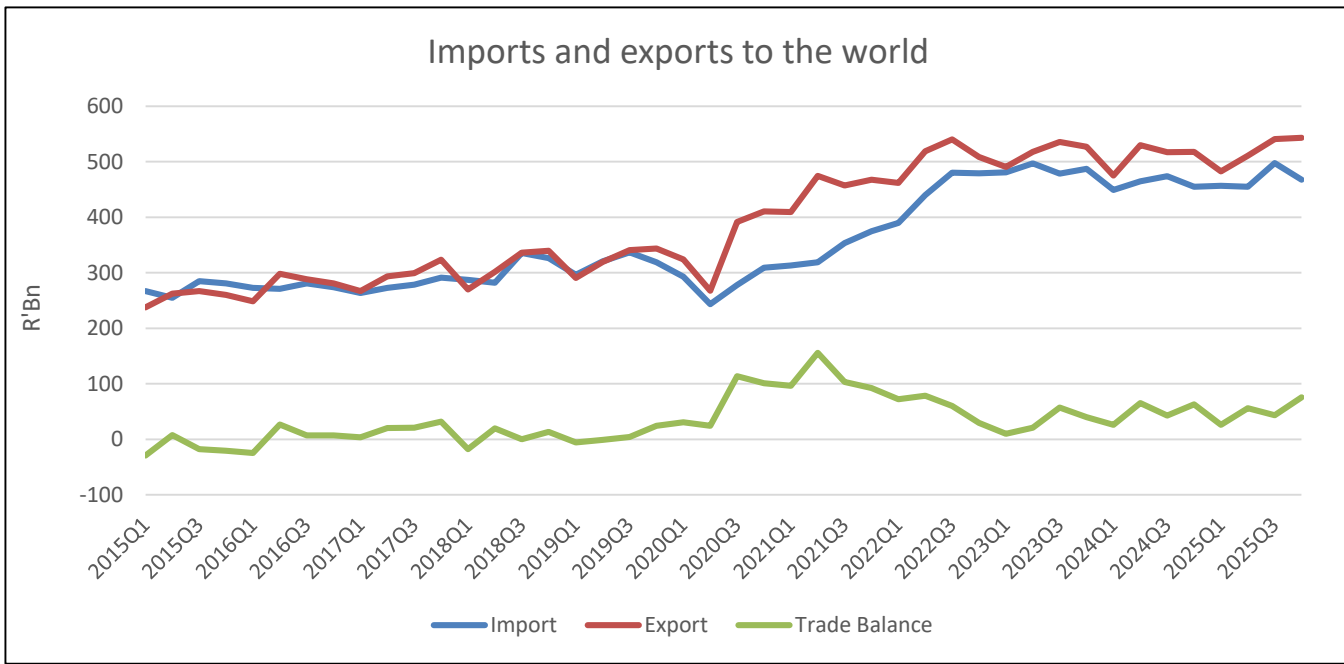
SA Trade Still Holding Up

Exports have held up well

- ❑ Currently trade surplus is sitting at R75bn, an improvement from the previous quarter recording R43bn.
- ❑ The manufactured exports are struggling due to the hike in US tariffs but could improve with the extension of AGOA for another year.

Impact of trade tension is sector-specific

- ❑ The 2025 Q4 data gives a high-level sense of the sectoral impacts we may be facing.
- ❑ Food exports show the highest decline in the quarter, followed by the non-metallic mineral products subsector.
- ❑ However, the wood and wood products as well as the other mining and quarrying showed the greatest resilience.



Source: Quantec, 2026

Source: Quantec, 2026

the dtic Vacancies as at Q3

Head Count 31 December 2025

Branch	Total approved structure	Total funded posts	Filled	Funded Vacant posts	Unfunded Vacant posts	Total Vacancy rate %	Unfunded vacancy rate %	Additional Filled
ADMIN	471	399	349	50	72	13%	15%	9
CCRB	71	68	57	11	3	16%	4%	1
CPEP	27	20	13	7	7	35%	26%	1
EDPOI	142	116	89	27	26	23%	18%	4
ERC	49	38	32	6	11	16%	22%	1
ICG	142	118	101	17	24	14%	17%	3
IFB	195	170	158	12	25	7%	13%	3
IIAFA	59	53	40	13	6	25%	10%	5
SIDET	104	87	66	21	17	24%	16%	4
TPNC	96	94	76	18	2	19%	2%	1
the dtic Total	1356	1163	981	182	193	16%	14%	32

Strengthening Entity Oversight and Governance – Chief Operations Officer / DDG: Departmental Operations

- Post established to enhance operational oversight, strengthen internal coordination, and support the DG in managing a broad span of control.
- Approved and funded in the organisational structure – critical for coherent planning, reporting, and governance across the department and its entities.
- The organisational structure is under review; a draft macro-structure has been developed and is under internal consultation.
- In the proposed structure, the Operations role is recommended to be located in the Office of the Director-General.
- **Benchmarking: (i) Department of Health** – COO post (vacant and unfunded); (ii) *DPSA* – previously reflected a COO post on its website, but confirmed not to have one (outdated structure); (iii) Health COO functions include Policy Coordination, Integrated Planning, Health Information Management, Research, and Monitoring & Evaluation.
- **Not supported by DPSA but remains critical to the Department’s structure and operations.**

the dtic Vacancies as at Q3

Vacancy Management Update (as at 31 December 2025)

- **375 total vacancies** across the department
 - **182 prioritised and funded**
 - **193 unfunded** (to be activated as funding becomes available)
- Recruitment of **182 key posts** initiated in **five batches** – at various stages of the process.
- Batches 1 -3 :
 - 90 % Advertised (68 of 76)
 - 78 % Shortlisted (59 of 76)
 - 61 % Interviewed (46 of 76)
 - 40% Completed (30 of 76)
- Batches 4-5:
 - Approval granted on 29 December 2025 for Batch 4 (48 permanent posts and 12 contract posts) and Batch 5 (57 posts) priority posts to be filled. JE and recruitment processes to be initiated.

Filling of Key Posts (as at 31 December 2025)

- **Deputy Director-General (DDG) Posts:**
- Recruitment and selection processes concluded for the following DDG posts:
 - Spatial Industrial Development & Economic Transformation
 - Competition Policy & Economic Planning
 - Industrial Competitiveness & Growth
- Submitted to the MPSA for tabling in Cabinet in November 2025, however, this did not take place. DG to DG engagements are underway.
- **DDG: Departmental Operations** – not supported by DPSA but remains **critical to the Department's structure and operations.**

Filling of Foreign Economic Offices: The department has identified strategic as well as priority foreign offices to be capacitated: Strategic Offices: USA (New York); UAE; Ghana; Ethiopia; Egypt; *Geneva x 3 posts. Priority Offices: Nigeria; Brazil; France; Japan. **12 posts advertised, shortlisted and interviews conducted as at 31 December 2025.**

Culture project: The appointment of a service provider concluded. **Project initiation underway.**

Entities' Executive Vacancies

No	Entity	Positions
1	CIPC	<ul style="list-style-type: none"> Executive Manager: Business Regulation and Reputation
2	CompCom	<ul style="list-style-type: none"> Deputy Commissioners x2 Divisional Manager: Advocacy Divisional Manager: Market Inquiry
3	ECIC	<ul style="list-style-type: none"> Chief Executive Officer Chief Operating Officer
4	IDC	<ul style="list-style-type: none"> Chief Operating Officer Divisional Executive: Mining, Metals Infrastructure & Energy (MMIE)
5	ITAC	<ul style="list-style-type: none"> Deputy Chief Commissioner
6	NCC	<ul style="list-style-type: none"> Commissioner
7	NCR	<ul style="list-style-type: none"> Chief Executive Officer Deputy Chief Executive Officer
8	NCT	<ul style="list-style-type: none"> Strategic Oversight Executive Chief Operating Officer Chief Governance Officer
9	NEF	<ul style="list-style-type: none"> Divisional Executive: Venture Capital & Corporate Finance
10	NGB	<ul style="list-style-type: none"> Chief Executive Officer
11	NLC	<ul style="list-style-type: none"> Company Secretary
12	NMISA	<ul style="list-style-type: none"> CEO appointed and organisational review in progress
13	NRCS	<ul style="list-style-type: none"> Chief Executive Officer (CEO) Deputy Chief Executive Officer
14	SABS	<ul style="list-style-type: none"> Chief Executive Officer (CEO)
15	SANAS	<ul style="list-style-type: none"> Chief Executive Officer (CEO)
16	TRP	<ul style="list-style-type: none"> Executive Director

Q3 Entity Board and CEO Appointments

Members of the Board of the Industrial Development Corporation (IDC):

1. Ms Tryphosa Ramano
2. Mr Andre Thomas Kriel
3. Ms Busi Mabuza
4. Mr Brain Dames
5. Adv. Thandi Orleyn

Member of the Board of the Export Credit Insurance Corporation (ECIC):

1. Ms Xoliswa Daku

The total number of Board appointment from Q1 to date is 64.

CEO of the National Metrology Institute of South Africa (NMISA):

1. Dr Mbulelo Nokwequ

Overview of the dtic Q2 & Q3 Performance

71 Number of indicators for the 2025/2026

30 Number of Indicators with Q2 targets

21 Number of targets achieved in Q2 (21 out of 30)

70% % Achievement for Q2

95% % Budget Achievement against Q2 budget allocation

71 Number of indicators for the 2025/2026

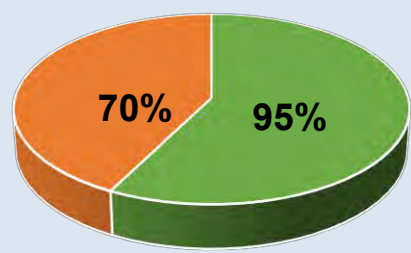
34 Number of Indicators with Q3 targets

13 Number of targets achieved in Q3 (13 out of 34)

40% % Achievement for Q3

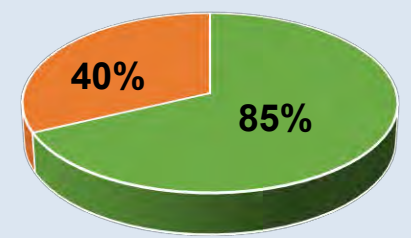
85% % Budget Achievement against Q3 budget allocation

% Q2 Performance



■ Budget Performance
■ APP Indicators Achieved

% Q3 Performance

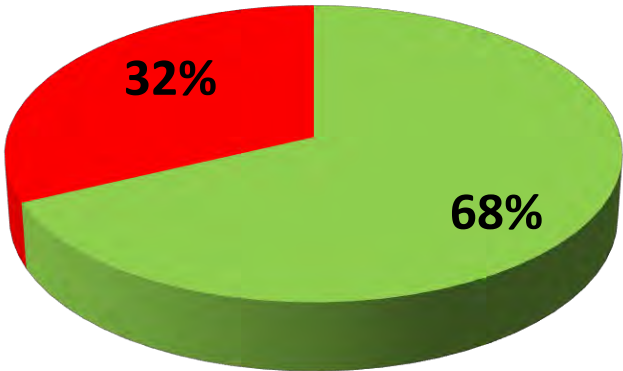


■ Budget Performance
■ APP Indicators Achieved

Programme	Total No of Indicators	Q2 Indicators with Targets	Number of targets achieved	Q3 Indicators with Targets	Number of targets achieved	Total Q2 Budget Allocation	Total Budget Spent (Q2)	Total Q3 Budget Allocation	Total Budget Spent (Q3)
1: Admin	8	3	2	2	0	234 483	220 090	220 451	217 140
2: Trade	11	0	0	6	1	26 660	40 194	46 834	52 772
3: Investment & Spatial	13	7	5	5	2	36 002	25 566	71 109	46 534
4: Sectors	9	9	8	9	7	451 841	288 738	223 702	354 020
5: Regulations	4	1	1	3	2	17 578	48 787	101 622	98 576
6: Incentives	6	3	2	2	0	1 680 412	1 124 422	1 372 795	937 479
7: Exports	6	0	0	0	0	51 970	46 104	58 351	36 866
8: Competition & Transformation	7	4	2	3	0	483 838	1 045 308	417 098	397 342
9: Economic research	7	3	1	4	1	12 087	12 476	8 587	10 635
Totals	71	30	21 (70%)	34	13 (40%)	2 994 871	2 851 686	2 520 549	2 151 364

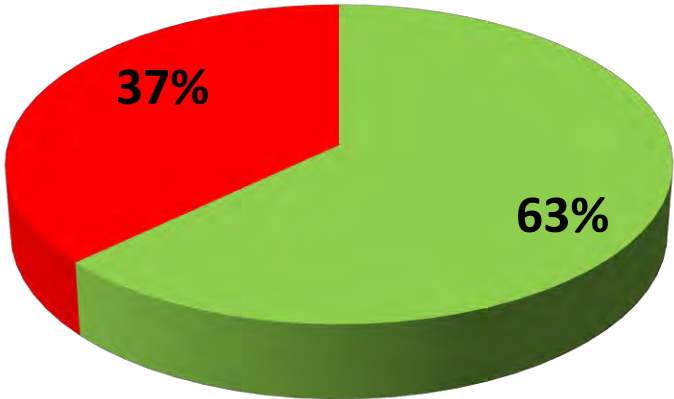
Overall Q2 & Q3 Entities' Performance

Q2 Entities' Performance



■ Achieved ■ Not Achieved

Q3 Entities' Performance



■ Achieved ■ Not Achieved

Q2 Entities' performance:
68% (13/19) entities achieved a minimum of 80% Performance in Q2

Q3 Entities' performance:
63% (12/19) entities achieved a minimum of 80% Performance in Q3

Summary of Entities' quarterly performance

No	Entity	Q1	Q2	Q3
1	Broad-Based Black Economic Empowerment (B-BBEE)	93%	71%	75%
2	Companies and Intellectual Property Commission (CIPC)	80%	85%	92%
3	Companies Tribunal	63%	88%	88%
4	Competition Commission (CompCom)	91%	76%	92%
5	Competition Tribunal	94%	85%	88%
6	Export Credit Insurance Corporation (ECIC)	50%	50%	50%
7	Industrial Development Corporation (IDC)	15%	31%	43%
8	International Trade Administration Commission (ITAC)	68%	68%	63%
9	National Metrology Institute of South Africa (NMISA)	83%	100%	100%
10	National Consumer Commission (NCC)	93%	88%	94%
11	National Consumer Tribunal (NCT)	100%	100%	100%
12	National Credit Regulator (NCR)	65%	93%	75%
13	National Empowerment Fund (NEF)	43%	43%	71%
14	National Gambling Board (NGB)	100%	100%	100%
15	National Lotteries Commission (NLC)	71%	80%	80%
16	National Regulator for Compulsory Specification (NRCS)	88%	88%	63%
17	South African Bureau of Standards (SABS)	71%	88%	80%
18	South African National Accreditation System (SANAS)	92%	92%	93%
19	Takeover Regulation Panel (TRP)	100%	83%	100%

12 - Achieved 80% and above of Q3 targets

7 - Achieved Below 80% of Q3 targets

(2) Trade: AfCFTA, Market Access & Industrialisation, SACU, Global & Multilateral leadership, Trade and Strategic trade relations and market diversification

Implementation of the AfCFTA

- Protocol on Women and Youth in Trade and Protocol on Competition approved
- Resolved outstanding AfCFTA rules of origin for autos and clothing and textiles.
- South African exports under AfCFTA preferences reached approximately R2.2 billion (Jan 2024 – Dec 2025).

Market Access and industrialisation

- Secured EU derogation on Electric Vehicle rules of origin, enabling South African EV and hybrid exports.
- Concluded the Clean Trade and Investment Partnership (CTIP) with the EU, unlocking approximately €12 billion for decarbonisation and industrial projects.
- Deployed two major trade instruments, including tariff reviews and inclusion of EVs and critical minerals under the Automotive Production and Development Programme.

SACU and regional integration

- South Africa has assumed the Chairship of SACU from the 14th of July 2025 to the 15th of July 2026.
- SACU agreed to prioritise negotiations with the US, China, and India, safeguarding a regional market representing 10% of global trade.
- Advanced regional value chain development in automotive and critical minerals through SACU decisions and planned auto pacts with Algeria and Egypt.

Global and multilateral leadership

- Successfully advanced all four South African trade priorities under the G20 Presidency, culminating in the adoption of the Trade Ministerial Statement.
- Led Africa Group efforts at the WTO, with three reform proposals submitted on policy space, special and differential treatment, and agricultural reform.

USA Framework Package

Maintained active engagement with the United States on reciprocal trade arrangements and AGOA renewal, despite shifts in US trade policy.

SACU offer to the US approved. Attributions to the Agreement on Reciprocal Tariffs with the US, as well as the mock tariff offer finalised and submitted to the USA.

Strategic trade relations and market diversification

- Implemented six Economic Interest Strategies with key partners (Saudi Arabia, UAE, France, Russia, Türkiye, India). These trade and investment packages aim to diversify exports to these markets and increase investment from these countries into South Africa.
- Concluded negotiations with China on the Comprehensive Africa–China Economic Partnership Agreement (CAEPA), with signature expected in February/March 2026.

G20 TRADE AND INVESTMENT OUTCOMES



The following **four priorities** were identified under South Africa's G20 Presidency:

- Trade and inclusive growth
- Responsive trade and investment agenda to address the challenge of global commons
- G20 framework on green industrialisation and investments
- WTO Reform

All four priority outcomes under South Africa's G20 Presidency were achieved.

South Africa successfully shaped the G20 agenda on inclusive growth, green industrialisation, and WTO reform.

The G20 Trade Ministerial Statement reflects South Africa's leadership and consensus-building role.



EU Clean Trade and Investment Partnership

Memorandum of Understanding (MoU) on Clean Trade and Investment Partnership Agreement between SA and the EU was signed on 20 November 2025.

This partnership will support the development of value chains that are more environmentally sustainable. It will make South Africa and the EU more competitive in a low-carbon global economy by improving conditions for investment in the extraction and local beneficiation of rare minerals, renewable energy, low carbon hydrogen and clean technology.

This partnership will improve cooperation between South Africa and the EU on some of the regulatory issues that constrain greater levels of trade. This work should enable South African companies to export products like sustainable fuel and electric and hybrid vehicles to the EU.

(3) Special Economic Zones (SEZ):

1. The final stage of development for the Coega Green Ammonia Project commenced on 7 July 2025 with the release of the request for proposals (RfPs). The proposal seeks the development \$5.8bn plant at the Coega SEZ. A final investment decision is expected in the third quarter of 2026.
2. The Gauteng Provincial Government submitted an application for the designation of the Vaal Special Economic Zone on 15 August 2025. The application was evaluated by a technical evaluation committee and recommended for designation to Minister Tau. Public consultation is set to be finalised during Q4. This SEZ is set to reindustrialise the Vaal region.
3. On 5 September 2025, the National Energy Regulator of South Africa (Nersa) approved an application by Cape Ocean Terminals for a combined licence to build a petroleum storage facility in the Freeport Saldanha IDZ and a pipeline connecting the storage facility to Berth 104 at the Port of Saldanha. Phase 1, which the energy regulator approved, will consist of eight storage tanks with a licensable combined design capacity of 155 120 m³, as well as auxiliary assets, including pumps, road-loading gantries, and slop tanks, to operate the facility.

On 13 August 2025, Mahindra South Africa launched a state-of-the-art assembly plant in the Dube TradePort SEZ. The new 14 000 square meter, operated in partnership with local firm AIH Logistics, is set to double Mahindra's investment in the country and enhance production capacity to meet surging demand across Southern Africa.

On 12 December 2025, the Atlantis SEZ signed a MoU with the CSIR. This will be key partnership in advancing the science of sustainable manufacturing. Given the work and focus of the CSIR on scientific and industrial research, the MoU will contribute substantially the ASEZ's goal of being a pioneering place that advances the science and activity of sustainable manufacturing.

CSIR AND ASEZ SIGNING OF AN MOU



LAUNCH OF MAHINDRA AT DTP



(3) Cross Border and Trade Link Corridors:

MoU between RSA and Mozambique:

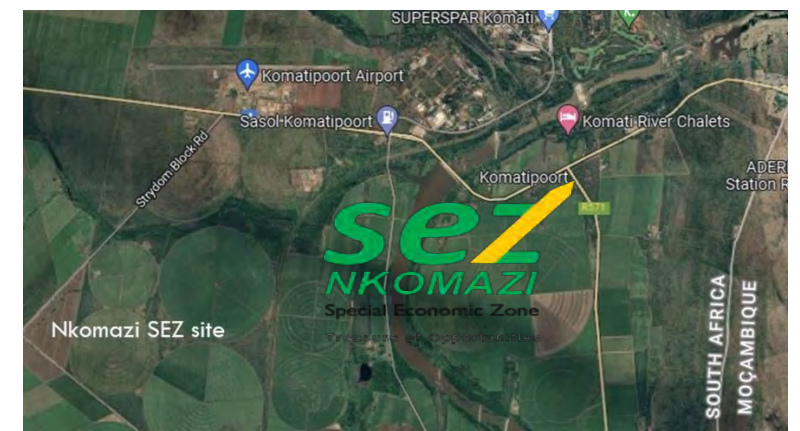
The Industrial Zones Programme (IZP) facilitated the signing of an MoU (3 December 2025) between Republic of South Africa and the Government of the Republic of Mozambique on Economic Corporation. under Article 6(g)(iii): Strengthen the Development of priority value chains and related trade facilitation protocols at the ports of entry for enabling cross border economic collaboration between Nkomazi Special Economic Zone and Port of Maputo.

MoU between MozParks Holdings and IZP on Mozambique cross border collaboration:

On 26 December 2025, an MoU was signed between the Industrial Zones Programme and Mozpark Holdings (Mozambique) to establish collaborative arrangements to develop and operationalise SEZ based cross-border value chain collaboration and economic and trade facilitation corridors between SA and Mozambique.

Signing of a Lease Agreement between DP World and Nkomazi SEZ

On 22 September 2025, the IZP facilitated the signing of a Lease Agreement between DP World and the SEZ, for 11.5 Ha of land in the zone.



Outcomes

Strategic Positioning of Nkomazi SEZ: The engagement affirmed Nkomazi SEZ's pivotal role in driving regional integration and enabling cross-border industrial development between South Africa and Mozambique.

Commitment to Bilateral Collaboration: Strong interest from Mozambican counterparts led to agreement on follow-up actions, including establishing technical working groups, coordinating stakeholders, and developing a joint SEZ collaboration framework.

RBIDZ Nyanza Project

In October 2025, the African Development Bank (AfDB) has announced that its board of directors has approved financing of \$75-million for Nyanza Light Metals.

The funding will support the development, construction and operation of an 80 000 t/y titanium dioxide pigment manufacturing plant, in the Richards Bay Industrial Development Zone.



(3) Investments (1)

R17.19 Billion Investments secured in Q2

R225.17 Billion Investments Secured in Q3

R251.65 Billion Year to date

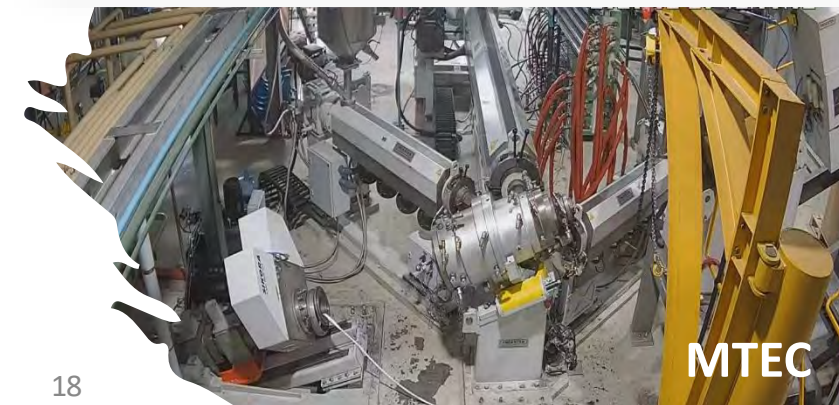
A number of investments have been facilitated through engagements, and Invest SA is a partner to the companies making the following investments in Q3

BASF - Chemicals company in Durban is increasing its investment in Durban by R105 million. The company is also a leading company on the African continent, anchoring its investment and expansions at its facility in Durban. The **company** will be launching the facility in March in Durban.

Air Liquide, in partnership with Wits and the Localisation Support Fund, will be setting up its hydrogen localisation investment facility at Wits. They have invested 100 million towards this facility. Hydrogen has **been** identified as a high-priority sector, and the aim of this facility is build on the localisation of components and use the facility as an R&D and testing facility for the hydrogen value chain.

MTEC expanded on their investment in Gauteng and made a commitment of R156.3 million, part of which included capex upgrades as well as a pipeline of CAPEX investment to increase its capacity and production of cables. The investment will upgrade cable manufacturing capacity and automation. It **will** also allow MTEC to strengthen domestic supply for power transmission and renewable energy projects.

Aberdare Cables - Continues to grow its footprint in South Africa and has undertaken a number of major expansions, including the latest investment of R80.3 million. The company is building on its capacity and capability to locally produce for the domestic market and position itself as a local leading manufacturer on the African continent.



(3) Investments (2)

Turkiye - Africa Business Forum

the dtic accompanied the Deputy President to Turkiye in October for the Turkiye–Africa Business Forum.

- Over 30 South African companies participated in the Business Forum to strengthen trade and investment ties.
- An MOU on Special Economic Zones (SEZs) was signed in Ankara to promote cross-border investments into SEZs.
- Defence sector collaboration was highlighted, including an MOU between Pamodzi and Aselsan.
- Post-visit, InvestSA led a Defence delegation to Konya to showcase South African defence capabilities and explore collaboration and supply chain opportunities.
- A DEIK delegation participated in the B20 forum and engaged with Invest SA to develop a roadmap for encouraging investment into South Africa.
- DEIK officials brought a delegation to the Mining Indaba and attended an investment forum hosted by the dtic in partnership with the DMRE. DEIK is facilitating a delegation to attend the upcoming Investment Conference.
- Invest SA facilitated a site visit for NAACAM to engage with Standard Profile, currently in discussions about expanding investments.



(3) Investments (3)

InvestSA Strategic Initiatives

1. Promoting South Africa at B20 and State Visits

- Invest SA presented South Africa's investment value proposition to visiting delegations from Vietnam, Indonesia, Malaysia, and Switzerland during the B20 forum and followed up post-State visits in October.
- Facilitated multiple engagements between South African authorities and visiting delegations to advance trade and investment opportunities.

2. Swiss Roundtable Engagement

- Hosted a roundtable in December with Swiss companies following the President's State visit to Switzerland in October.
- Presented South Africa's investment value proposition and addressed concerns raised by Swiss businesses to strengthen bilateral investment relations.

3. Strategic Partnership in China

- Launched a strategic partnership with the GO Global Service Centre in Shenzhen's Nanshan district in November, establishing a physical **dtic** presence in China to support South African businesses.
- The initiative coincided with participation at the 8th China International Import Expo (CIIE) in Shanghai, enhancing trade and investment ties with China.



(4) Sectors: Re-Industrialisation

The **National Industrial Policy (NIP)** approved by the Accounting Officer, the DG Cluster and the Ministerial Cluster. However, due to time constraints it was deferred by Cabinet on 05 Dec 2025, to serve in Feb 2026. The National Industrial Policy 2025 sets out the government's action plan for industrial development of the South African economy. It seeks to promote industrialisation with higher levels of growth accompanied by higher levels of employment to overcome the core socio-economic challenges of deep levels of inequality and joblessness.

Three key areas are seen as critical for driving South Africa's industrial growth and transformation. These are:

- Decarbonisation,
- Digitalisation, and
- Diversification.

Hemp and Cannabis Commercialization Policy was approved by the DG. Report on the Implementation of a Hemp and Cannabis Commercialization Policy outlined the following:

Export Data

- Export data recorded up to October is R69 776 359. (medicinal Cannabis) - 15546.18 kgs;
- True Hemp Yuan Export recorded up to October is R72 505 259 (for 280 780kg) - kgs – Source

Total Value: R142 281 618

(4) Sectors: Enhancing competitiveness and job creation

Electrotechnical Sector:

MTEC cables launched its R110 million Medium Voltage Power Cable expansion investment in Sedibeng district municipality on the 22 October. The expansion created an additional 68 new jobs, and retaining the 380 existing jobs. It's a result of the Import replacement programme implemented by the sector desk and the cables industry.

Damen Shipyards

- Damen also secured a contract in the Middle East for 10 Stan Patrol vessels and is promoting South African goods and services abroad under its Strategic Partnership Agreement with **the dtic**. As part of this, Damen identified Reutech Radar Systems as a potential supplier of the RTS 3200 Frequency Modulated Continuous Wave (FMCW) Optronics Radar Tracking System (FORT), a lightweight, cost-effective radar designed for naval applications.
- The client has shown interest in Reutech's offer which if selected, will be procured directly by the client, resulting in export sales valued at approximately USD 13.5 million.
- This initiative aligns with Damen's 2019 MoUs with Reutech companies, ensuring NIPP credits arising from such business opportunities are attributed to Damen, while strengthening South Africa's defence exports and industrial participation objectives.
- **Total revenue:** R 233 280 000
- **Retained Jobs** 3

SAAB AG Sweden

- SAAB AG Sweden has directed work packages to SAAB Grintek in SA as part of its Strategic Partnership agreement in NIPP for the *enhancement of the lightweight Radar-Electronic Support Measures (R-ESM) and Communications Electronic Support Measures (C-ESM) sensors*.
- The objective of this project is to enable SGD through an investment from Sweden to expand existing antenna production facilities, with specific focus on the facility and equipment needed for the manufacture of 3D printed parts, to meet the delivery schedules and demand for expected new orders of Sirius Compact antennas to be received during 2025 and beyond.
- The investment is estimated at R17 million with expected export sales of at least R400 million over 10 years.
- **Total revenue:** R 400 million
- **Retained Jobs** 5

Steel Master Plan

Rail Sector:

- On the 2nd of December 2025 Traxtion announced the R3.4bn investment in rolling stock, this will be R1.8 billion for 46 locomotives and R1.6 billion for freight wagons.
- Transnet secured R6 billion loan from the French Development Agency (AFD) and R140 million grant from the European Union (EU) for its decarbonization initiatives, with the agreement announced on the sidelines of the G20 Summit in Johannesburg in November 2025. This funding is a key part of the Just Energy Transition Partnership (JETP) and is aimed at improving Transnet's infrastructure and advancing its green hydrogen strategy.

Automotives Sector:

- VSL Manufacturing has unveiled its R750 million, purpose-built facility in Gqeberha on the 27th of November 2025, marking a major boost to South Africa's automotive value chain. The 51% black female-owned company partnered with Isuzu Motors SA, AITF, IDC, BIS, and Absa Group to develop the metal stamping (press-line) plant adjacent to Isuzu's assembly site is, improving efficiency, reducing logistics costs and our carbon footprint, and driving localisation and sustainability.

(4) Sectors: Localisation

Steel Master Plan

ACTOM has received approval from the Competition Commission and Competition Tribunal in SA, to acquire the assets of transformer manufacturer SGB-SMIT Power Matla. The various other statutory processes are in the process of conclusion. The transaction which is for an undisclosed amount, positions ACTOM as Africa's largest transformer manufacturer. For the first time, ACTOM will be able to produce Class 3 transformers of up to 500 MVA/400 kV. Until now, the company manufactured only Class 0, 1 and 2 transformers. With SGB-SMIT Power Matla's assets, ACTOM becomes the only African company able to manufacture large-scale Class 3 transformers. The branch has been instrumental in providing technical and policy support throughout the whole process.

Capital equipment and Allied Services Sector

On the 06th and 07th December 2025, KSB launched a proudly South African manufactured self priming waste water pump. In support of **the dtic** drive for import replacement, they designed and locally manufactured, self-priming wastewater pump designed specifically for tough African operating conditions, featuring a large solids-handling capacity. This has enabled **the dtic** to decline exemptions for importation of these products.

(4) Sector Master Plans

1

Master Plan: Sugar

1. The Minister has approved and gazetted amendments to the Sugar Act Regulations to support the stabilization of the SASA structures and to formally acknowledge the active role of small-scale growers.
2. ITAC has initiated the DBRP process in respect of the sugar tariff and has received two applications from stakeholders in both the upstream and downstream segments of the industry.
3. The Minister further granted a block exemption for the 2025/26 period to enable industry engagements on matters relating to Eswatini imports, the notional price mechanism, and downstream sugar diversification.
4. Tongaat Hulett has paid R200 million to SASA by the end of January 2026 to settle a current season statutory levies.

2

Master Plan: Poultry

1. The extension of the United States AGOA provisions for poultry enables eligible exporters to retain duty-free access to the US market, thereby benefiting importers through reduced tariffs, lower input costs, and enhanced supply certainty.
2. ITAC and the Department of Agriculture (DoA) have commenced issuing permits to importers of poultry products from the United States.
3. The DoA has committed R200 million to support the poultry sector and other agro-processing industries through a blended finance facility with ABSA Bank, and applications are currently being processed.
4. The Gauteng Department of Agriculture and Rural Development (GDARD) has also allocated blended funding in support of the Poultry Master Plan through the National Empowerment Fund (NEF), with applications having closed on 17 January 2026.

3

Master Plan: Furniture

1. **Tariff evasion**
2025 SARS worked closely with the industry in correcting the undervaluation and the misdeclarations, resulting in a number of cases being investigated and penalties. In Q3 2025, five cases were investigated and finalised in post-clearance audit, 40% were found to be non-compliant, and revenue collected amounted to R238,797. An additional R552,158 was collected by the Frontline (Processing Hubs).
2. **Furniture Challenge Fund**
 - NEF approved ten deals totalling R40 million in Q3 All approved transactions are 100% black-owned, 3 of which are over 50% women-owned.

4

Master Plan: Medical Tech

Regulatory

- Funding support from Meddic wrt a MP activity to review and streamline existing regulations to remove redundancies, align laws and policies and close legislative gap – Q3 (round-robin approval by the Meddic SC on 13 Nov 2025).
- A key is to draft a stand alone act for the sector as well harmonise regulatory frameworks with other African continent enabling market access. SAHPRA have advised that they have submitted a formal request to NDoH re an overhaul of the existing regulations.
- Work currently being undertaken to support regulatory harmonization on the Continent.

Market Growth

- Funding support from the LSF for a demand mapping study (Phase1) that would identify high-import dependant products (procured by State and private healthcare facilities) with potential for local manufacture, linking to the Sector's capability (Phase 2) – Q3 (17 Oct contract signed and work commenced on 25 Oct 2025).
- Align procurement practices with NHI to prioritise localisation which is in progress.
- Find solutions to expedite settlement of outstanding government debt to suppliers – engagements with the WBG and NT on possible solutions.
- The Master Plan is planning to host it's own Med Tech event in early 2027 that would showcase manufacturing and other capability in the country.

5

Master Plan: Cannabis

1. The DoJ&C has released the Cannabis for Private Purposes Regulations for public comments, closing on 5 March. 2026 Regulations are intended to regulate how cannabis may be grown, possessed, and used for private purposes.
2. DoA brought the Plant Improvement Act of 2018, into effect on 1 December 2025 together with new regulations on hemp. The permissible amount of THC in hemp plants has now been raised to 2% from 0.2%.
3. **Department of Small Business Development (DSBD)** has been asked to include provisions for the licensing of cannabis businesses in the Business Act or the draft Business Licensing Bill. This will allow the regulated sale of cannabis. On 03 September 2025, Cabinet approved the publication of the Business Licensing Bill, 2025 for public consultation.
4. **Version 2 of the Hemp and Cannabis Commercialisation Policy** has been finalized and submitted for the consideration of the Director-General prior to wider public consultation.
5. Hemp seed varieties (e.g., ARC-CAN-01 and ARC-CAN-03) were included in the DoA's **National Varietal List by June 2025** and reaffirmed in the **December 2025** list.

(4) Sector Master Plans (1)

6 Master Plan: Automotive

Governance and Institutional Refinements

- AITF appointed as EOC secretariat and Technical Task Team established to strengthen coordination.
- 2 October 2025: Preparations finalized and EOC held during the SA Auto Week.
- EOC Terms of Reference adopted with AITF tasked to refine the Automotive Transformation Fund framework.

Policy and Incentive Developments

- APDP2 and AIS amendments finalised, including a 150% EV and hydrogen capital allowance through the Taxation Laws Amendment Act.
- ITAC investigations progressed on battery materials and SKD assembly requirements.
- Automotive policy review timelines revised to ensure completion by end-2025.

EV Transition and Strategic Alignment

- EOC agreed on short-term support measures, including plug-in hybrid inclusion and strengthened ad valorem proposals.
- Continued coordination on steel tariff measures and EV incentive frameworks (ACM and MHCV EEIP).
- Critical Minerals Strategy and EV Skills Workstream advanced, including a 100-student pilot planned for 2026.

7 Master Plan: R-CTLF

Localisation & Competiveness

- 81 million additional garments identified for localisation through targeted engagements with NCRF retail members by Localisation Support Fund study. Study published on 11 February 2026. A plan of action involving all stakeholders required to make this a reality.
- Over 23 million garments manufactured more competitively through utilizing the woven fabric rebate up to Q3 for the 25/26 FY, that is from April-December 2025.
- Aggregation report received in Q2 - Masterplan signatories were projected to purchase 402 m local CTFL units in 2025 (70% more than in 2019), with demand forecast to grow 0.5% in 2026 from 2025.
- Discussions with stakeholders on the implementation of a yarn rebate continued in December 2025.

Funding & Programme Support

- By Q3 2025 (from inception Sep 2021), the CTFL Growth Programme (IDC-administered) approved R2,481 billion in grants/loans, disbursing R2,042 billion to 192 businesses.
- The review of the CTFLGP guidelines was concluded in December 2025. The guidelines are currently being finalised for submission to the PMC, with implementation planned for the 2026/27 financial year.

Market Access & Promotion

- In Q2 the Proudly SA E-commerce platform was launched; NCRF support driving registrations from CTFL sector; other platforms are improving access for local manufacturers.
- On 19 November 2025, a workshop was convened by the C&T sector desk, to discuss the impact of United States tariffs. **the dtic** outlined the available support mechanisms, which were shared with affected stakeholder participants.

Sales & Growth Trends

- R-CTFL sales grew at a 3.66% CAGR from 2019–2024, while 2025 YTD retail sales are up 8.4% year-on-year, up to Oct 2025.
- CTFL manufacturing has shown marginal growth from 2023 to 2024. 2025 YTD (Oct 25) manufacturing sales have increased slightly by 5.34% from the same period last year.

(4) Sector Master Plans (2)

8

Master Plan: Steel and Metal Fabrication

Trade Measures Implemented:

ITAC Report No. 742:

The department supported ITAC's recommendation for the creation of a temporary rebate provision for the importation of stainless steel tubing used in the manufacturing of processing plants for the hygienic and liquid food industries. It has been approved by ITAC.

Applications with ITAC recommendation at National Treasury:

ITAC Report No. 735:

- The department supported ITAC's recommendation for an increase in the general rate of customs duty on conical steel drums from free of duty to the WTO bound rate of 15% ad valorem. It has been signed off by the Minister and now with the National Treasury for consideration. (there are new developments-see below**)

Applications with ITAC recommendation seeking Minister's approval.

ITAC Report No. 735-Addendum

- **SARS** identified a technical conflict at the stage of implementation, it found that the affected tariff subheadings fall under different liberalisation provisions of the **AfCFTA**. If implemented without adjustment, the recommendation could unintentionally reduce applicable AfCFTA duties from 9% to 0%, undermining the policy intent. As a result, ITAC has requested an amendment to the initial report to correct the technical error, whilst preserving the **AfCFTA** commitments at the same breath safeguarding local industry. Also to ensure that the 15% duty increase applies only to the targeted product range, without unintended tariff reductions.

ITAC Report 751

- The department supported ITAC's recommendation for an increase in the general rate of customs duty on rails, classifiable under tariff subheading 7302.10 from 5% to 10% ad valorem. Internal memo was signed by ADDG sectors on 12 September 2025.

(5) Credit, Liquor, Consumer Protection and National Gambling Regulations

Making Liquor, Credit, and Gambling Laws Work Better for the Public: By the end of June 2025, Government had processed new Regulations to improve how credit, liquor, and gambling are managed in the country. These are part of the 7 regulations planned for the year.

Credit Industry:

- Regulatory reforms for the Credit Regulations are underway to ensure policy certainty, greater financial inclusion and to contemporize areas to align with economic realities.
- A draft set of Credit Regulations was gazetted in August 2025 for public comment. The department is engaging in a holistic approach to amend priority Regulations.

Liquor Industry:

- The liquor regulations are being updated to ensure effective regulation of the liquor industry, reduce red tape and improve service delivery for businesses and the public.
- Liquor Amendment Regulations, were published for public comment on 08 August 2025.
- Received comments were analyzed and further consultation was undertaken with the NLA and Legislative drafting with the intention of finalising the Regulations.

Consumer Protection:

1. Amendment Regulations – Consumer Protection Act (Section 11)

- Introduces stronger controls against unwanted direct marketing communications.
- Enables consumers to activate a pre-emptive block on all direct marketing communications.
- Establishes a National Opt-Out Registry to be administered by the National Consumer Commission.
- Requires mandatory registration of all direct marketers to strengthen consumer privacy rights.
- In Q3, the regulations were recommended to the Minister for implementation.

2. Review of Industry Ombud Codes (Section 82 of the CPA)

- Conducted the five-year statutory review of the Motor Industry Ombudsman and Consumer Goods and Services Ombud Codes.
- Review considered consumer complaints, litigation trends, and implementation challenges.
- Industry codes were published for public comment on 9 May 2025; provincial consultations and stakeholder inputs were incorporated.
- Final draft submitted to the Office of the Chief State Law Advisor for legal vetting.

Gambling Industry:

1. Amendments to Gambling Regulations 2 and 8(4)

- Strengthened measures to assist individuals with gambling addiction through improved exclusion mechanisms.
- Introduces a simplified voluntary self-exclusion process.
- Provides for the establishment of a National Self-Exclusion Register, enabling individuals to register using a standard form.
- **Minister approved publication of the draft regulations for public comment in Q3.**
- Final implementation will activate the national self-exclusion register as a key consumer protection measure.

2. Amendments to Limited Pay-Out Machines (LPM) Regulations

- Aimed at reducing red tape and supporting economic growth.
- Provides for review of prizes and stakes, unchanged since 2000.
- Increases the number of LPMs per site from 5 to 20.
- Streamlines licensing processes by reducing timeframes once provinces reach 50% of their licence thresholds.
- Enhances compliance with regulatory standards.
- Regulations currently with the Office of the Chief State Law Adviser (OCSLA) for vetting and translation.

(5) National Gambling Policy Council and National Liquor Policy Council



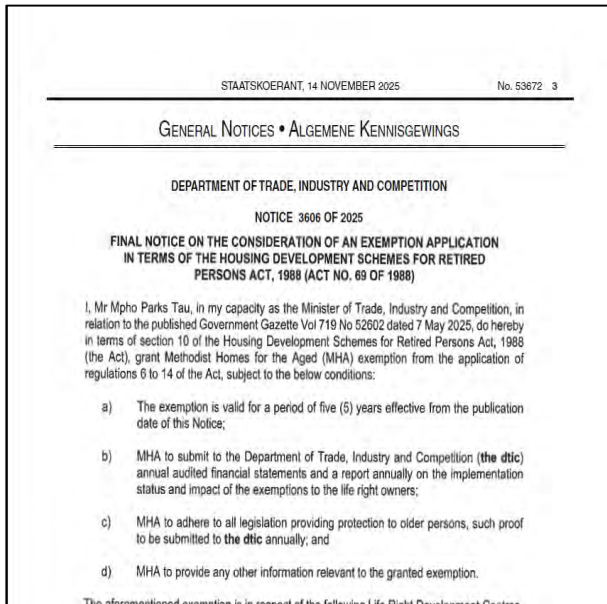
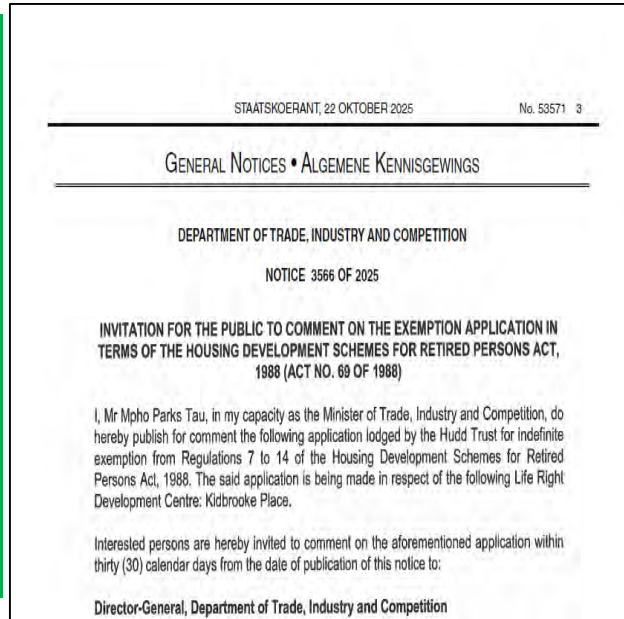
Minister Parks Tau hosted the National Gambling Policy Council (NGPC) and the National Liquor Policy Council (NLPC), at the Airport Gardens Boutique Hotel, in Gauteng.

Both Councils serve as the Intergovernmental Forum, chaired by Minister Parks Tau, and comprises the Director-General, Members of Executive Councils (MECs) for each province responsible for liquor and gambling licencing matters, and provincial representatives.

the dtic successfully resuscitated the National Gambling Policy Council and the National Liquor Policy Council in 2025, marking a significant milestone as the statutory meetings had not convened since 2018. Meetings were held on 8 July 2025 and 30 October 2025, addressing key issues including the review of the National Gambling Act and Liquor Act, online gambling, the National Gambling Amendment Bill (2018) in mediation, and gambling advertising. The Councils established dedicated Gambling and Liquor Technical Committees to strengthen provincial support and enhance coordination. These forums play a critical role in ensuring cooperative governance, policy harmonisation, and uniform regulatory standards across national and provincial spheres. Priority focus areas include addressing the social impact of increased gambling in society; regulating excessive advertising, and responding to the rapid growth of online gambling.

(5) Exemption Applications Gazetted

The Hudd Trust exemption application in terms of the Housing Development Schemes for Retired Persons Act, 1988 was approved by the Minister for wider public consultation on 22 October 2025 for a period of 30 calendar days. The Final Notice was submitted for the Minister on 11 December 2025.



The Final Notice of the Methodist Homes for the Aged was published in the Gazette on 14 November 2025 for the approval of an exemption application issued in terms of the Housing Development Schemes for Retired Persons Act, 1988

Education and Awareness workshops:

These activities took place in the North West and Limpopo Provinces **focusing on the respective pieces of legislation within Regulatory Policy & Legislation**. The objective was to create awareness of the various pieces of legislation among the public.

North West:

- **16 October 2025:** Dr Ruth Segomotsi Mompati; Municipality: Greater Taung, Participants total 155

Limpopo Vhembe district:

- **28 October 2025:** Municipality: Thulamela; Vhembe district municipality-Council Chamber; Participants' total: 74
- **29 October 2025:** Municipality: Makhado; Makhado show ground; Participants' total: 99
- **30 October 2025:** Municipality: Giyani; Giyani banquet hall; Participants' total: 107
- **31 October 2025:** Municipality: Collins Chabane; Malamulele community hall; Participants' Total: 211

(5) Notices of the applications: Merchandise Marks Act of 1941

Final Notices of the applications of the Merchandise Marks Act of 1941 were published in the government gazette in Q2, **6 applications** were received from Thabo Mofutsanyana District Municipality, the Directorate for Priority Crime Investigation (the Hawks), the South African Revenue Service (SARS)-AEO, Olive or Twist (Pty) Ltd, SA Greetings (Pty) Ltd and Maskew Miller Learning (Pty) Ltd.



South Africa's National Symbols

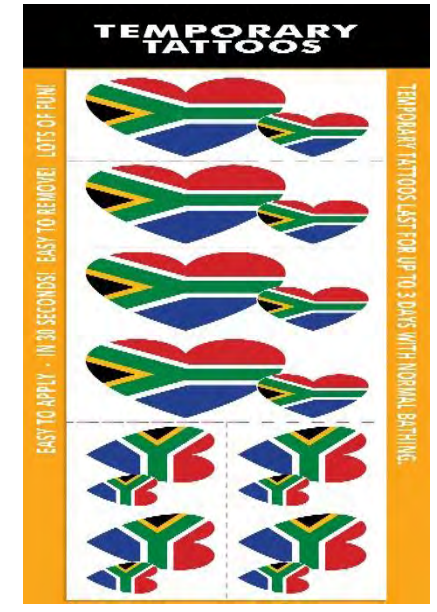


Every country has national symbols. The symbols are special and unique to that country. They are only found in that country. South Africa has a national flag, anthem, bird, animal, fish, flower, tree and coat of arms.



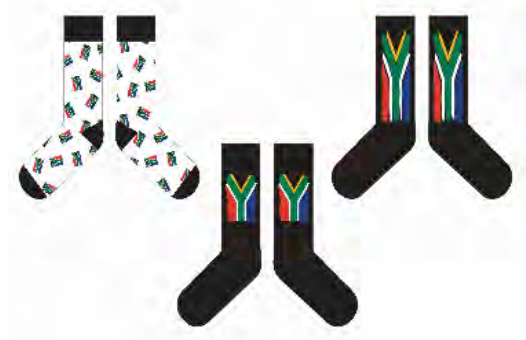
CROW SOCKS

SA GREETINGS



ANKLE/NECKER SOCKS

SA GREETINGS



(6) Approvals & Disbursements (Q2 & Q3 2025/26)

APPROVALS

The IB approved over
R2.4bn

with projected investment of over
R26.1bn

that will be generated over the next
2-5
years

Approvals provide insight into the performance of businesses over the next two to five years and signal their potential contribution to the economy.

DISBURSEMENTS

Disbursements show the current impact of industrial funding

R1.9bn
disbursed

Over **2 000**
Permanent new jobs

Over **6 000**
Digital new jobs

R5.1bn
Service exports

Over
R334 million
Financial support to SMMEs, women and youth-owned businesses

R303 million
Financial support to Black Industrialists and black-owned businesses

Over
R413 million
Financial support to enterprises in areas outside the five main metros

Deepening transformation through ownership and targeting districts

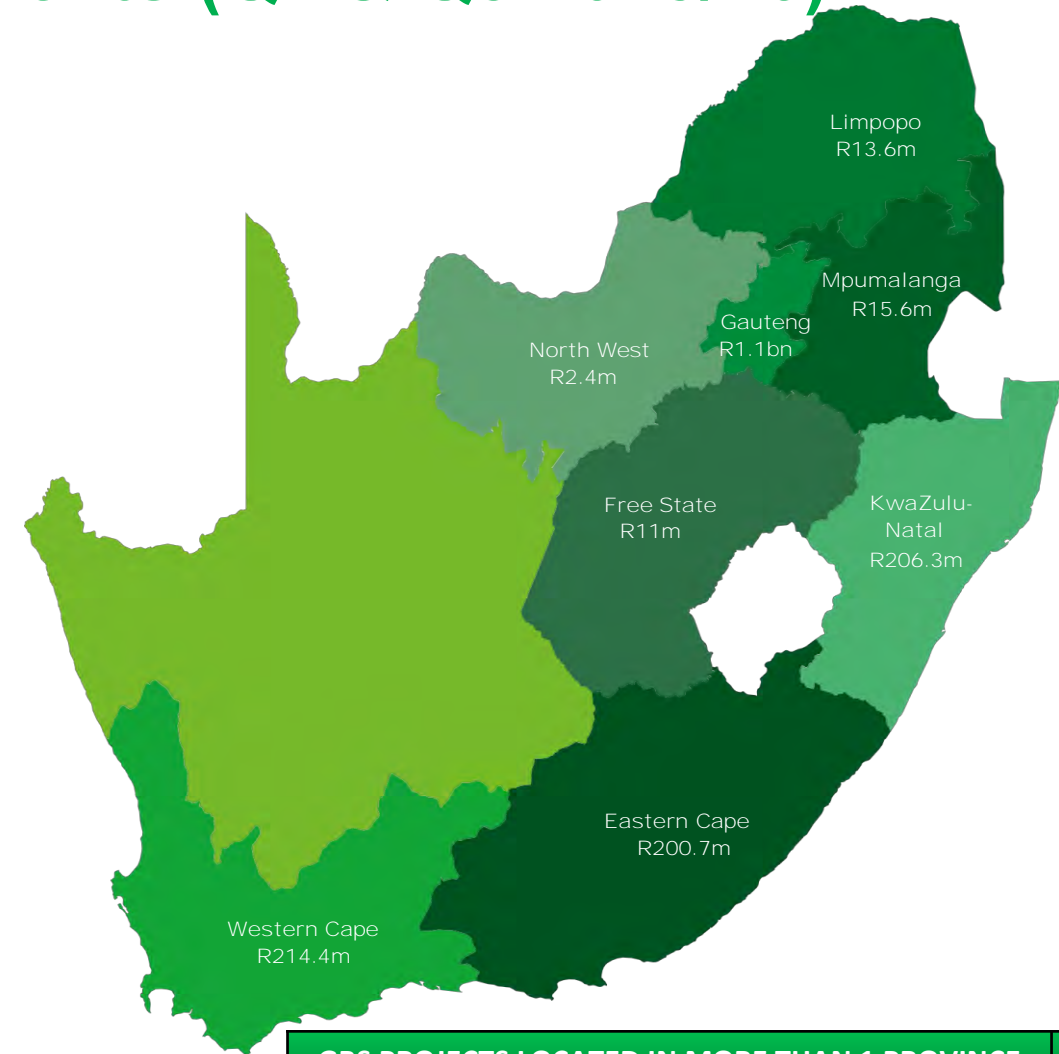
R2.4 billion will generate investment of over R26 billion during the next two to five years. 70% of this investment will be generated by Infrastructure projects and 30% largely by automotive manufacturers. A female owned critical infrastructure project for a water treatment plant in the City of Johannesburg, which will creating over 4 400 construction jobs. The project will address the need for sewage connections in fast growing area with various residential developments and luxury hotels/lodges with no municipal sewage connections. The area, which is located near the Lanseria airport, has potential for the development of commercial activities in the tourism, film, agriculture, retail and logistics activities.

Automotive projects includes an Original Equipment Manufacturer (OEM) located in the City of Tshwane which will for the first time be producing a Plug-In Hybrid Vehicle in South Africa that will target Europe and other markets with stringent emissions requirements with 96% of vehicles expected to be exported. The plant plans to sustain over 2 000 jobs and source R19 million of raw materials from local component manufacturers. It also includes a new OEM that expects to create over 700 new jobs in the Coega SEZ and source approximately R8 million worth of raw materials from local component manufacturers thereby contributing towards localisation of the supply chain.

Outsourcers funded through the Global Business Services reported R5,1 billion generated through exports of services in areas such as accounting, finance, human resources, online education, cloud-based technical, customer care and sales services. These projects, which employ at least 80% youth are empowering the youth with digital skills using digital platforms and artificial intelligence to improve service delivery.

(6) Spatial Distribution of Disbursements (Q2 & Q3 2025/26)

DISTRICT MUNICIPALITY OUTSIDE 5 MAIN METROS	AMOUNT DISBURSED
Amathole District Municipality	R13 .4 million
Bojanala Platinum District Municipality	R2.4 million
Buffalo City Metropolitan Municipality	R21.6 million
Cape Winelands District Municipality	R12.2 million
Capricorn District Municipality	R9.7 million
Garden Route District Municipality	R2 million
Gert Sibande District Municipality	R12.1 million
iLembe District Municipality	R54.8 million
Lejweleputswa District Municipality	R2.7 million
Mangaung Metropolitan Municipality	R8.3 million
Mopani District Municipality	R3.9 million
Nelson Mandela Bay Metropolitan Municipality	R160.3 million
Nkangala District Municipality	R3.5 million
OR Tambo District Municipality	R5.2 million
Overberg District Municipality	R8 million
Sarah Baartman District Municipality	R155 500
Sedibeng District Municipality	R4.1 million
Ugu District Municipality	R13.8 million
uMgungundlovu District Municipality	R64.9 million
West Coast District Municipality	R4.9 million
West Rand District Municipality	R5.7 million



GBS PROJECTS LOCATED IN MORE THAN 1 PROVINCE	DISBURSED
KwaZulu-Natal and Western Cape	R59.5 million
Gauteng, KwaZulu-Natal and Western Cape	R12.9 million
Gauteng and Western Cape	R7.1 million
Eastern Cape, Gauteng, KwaZulu-Natal and Western Cape	R4.4 million
Eastern Cape and Western Cape	R56.2 million

(6) Global Business Services (GBS) Impact

Advances inclusive economic growth, strengthens export-led digital services, supports youth employment, and deepens South Africa's integration into global services value chains.

- The Global Business Industry continues to be a significant driver of youth jobs with at least 80% of new jobs employing youth.
- According to the latest Business Process Enabling South Africa (BPESA) sector report, from March to September 2025, the industry created over 13 000 new jobs.
- Outsourcers funded through the Global Business Services incentive from April to December 2025, reported R8 billion generated through the export of services, a return of R17 for every R1 invested by the incentive.
- The evolution from traditional call centres to higher value services continues and includes accounting, financial, human resources, online education and cloud-based technical services.
- Funded projects are empowering youth with digital skills through the use of digital platforms and artificial intelligence to improve service delivery.
- Government is exploring other forms of funding to enhance sustainability and investor confidence in this industry.



Concentrix

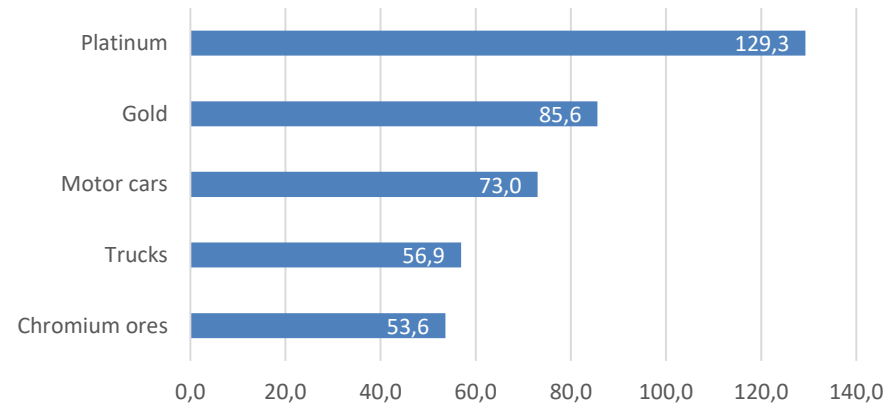
(7) Total Exports

Rand Value of South African Exports to the Rest of the World in key industrial sectors including services – R 67.5 billion

Rand Value of South African Exports to the Rest of Africa in key industrial sectors including services – R 86.4 billion

Based on available data, South Africa's exports over the period Q2 and Q3 of 2025-26 shows that China continues to be SA's top destination with Germany, and the USA and Japan also major markets. In terms of products, precious metals and autos continue to be the top export goods.

Top 5 export products, July to December 2025, R Billion



Top 5 destinations, July to December 2025, R Billion



* SARS provisional data for July to December 2025 subject to updates

Top Exported Products by Top Export Destinations, July to December 2025

	China	Germany	USA	Japan	Unknown origin
1	Chromium ores	Automotives, cars	Platinum	Platinum	Gold
2	Iron ores	Platinum	Automotives, cars	Unwrought aluminium	Platinum
3	Manganese ores	Trucks	Unwrought aluminum	Iron ores	Stores for aircrafts
4	Platinum	Precious metal ores	Ferro-alloys	Coal, briquettes	Frozen fish
5	Refined copper	Centrifuges	Granulated slag	Trucks	Machinery parts

* SARS provisional data for July – December 2025 subject to updates

(7) Export Development – Implementation of the Butterfly Approach

Strategic Collaboration on the UK Trade Partnerships Programme

- **the dtic** initiated a strategic collaboration to implement the United Kingdom Trade Partnerships (UKTP) Programme in South Africa. This programme is delivered by the International Trade Centre (ITC) and funded by the Foreign, Commonwealth and Development Office (FCDO) of the UK Government. A total of **38 x emerging exporters** have been selected from two priority sectors —Green Technology and Agri-Food & Processed Foods.
- These businesses are currently receiving support through trade exhibitions, trade missions, and market readiness training. The programme is expected to significantly boost exports and foster international trade through enhanced market access.

As part of this programme key activities were delivered during the 2nd & 3rd quarter, as follows:

- **74 x SA companies** attended a masterclass on EU-SADC EPA for emerging growers and exporters;
- The branch coordinated a buyer's mission from 20 - 22 July 2025 consisting of **5 x UK buyers** with interest in Teas: loose leaf, bagged, and ready-to-drink canned teas; fresh fruits and vegetables, snack foods suitable for airlines/catering and health foods;
- **26 x SA companies** attended a **UKTP Marketing and Branding Workshop** for the newly recruited group of emerging exporters within the Agriculture and Processed Foods stream held from 23-24 July 2025 in Johannesburg;
- **9 x SA companies** attended IFAT Africa from 8 -10 July 2025 in Johannesburg;
- **39 x SA companies** The Exports Branch facilitated its first bootcamp for the Next-Gen Exporter Incubation Programme.

The breakdown of the companies comprised of:

- **39 x SMMEs entities;**
- **39 x Black owned entities;**
- **16 x Women-owned entities;**
- **39 x Youth-owned entities.**

In support of the 300 entities capacitated on exporting skills, the department delivered the following:

Strengthening Trade Ties with Germany through the PG Programme

- **the dtic** on the Partnering in Business with Germany (PG) Programme, hosted Annual Alumni Networking event in Cape Town and **37 x SA companies** benefitted. This initiative aims to strengthen trade and investment linkages between South African and German SMEs. During the 2nd & 3rd quarters **37 x SA companies** received training and mentorship support in Germany.

The breakdown of the companies comprised of:

- **37 x SMMEs entities;**
 - **32 x Black owned entities;**
 - **17 x Women-owned entities;**
 - **7 x Youth-owned entities.**
- **165 x SA companies** benefitted from the Global Exporter Passport Programme(GEPP) in collaboration with the South African Breweries as part of Strategic Public Private Partnership.

The breakdown of the companies comprised of:

- **165 x SMMEs entities;**
- **96 x Black owned entities;**
- **103 x Women-owned entities;**
- **17 x Youth-owned entities.**

(7) Export Promotion– Implementation of the Butterfly Approach

Key activities undertaken during the 2nd & 3rd quarter are as follows:

- ❑ **394 x SA companies** financially benefitted from the Export Marketing and Investment Assistance (EMIA) Group Scheme to participate in 15 export promotion initiatives, from July – December 2025.

INAUGURAL BNC AND TURKIYE-AFRICA BUSINESS FORUM

- ❑ Co-Hosting of the South Africa–Türkiye Business Forum
In collaboration with DEİK, the Export Desk coordinated the South Africa–Türkiye Business Forum on 17 October 2025. The event, attended by Deputy President Paul Mashatile and Türkiye’s Minister of Trade, H.E. Ömer Bolat, provided a platform to reaffirm bilateral trade commitments and promote partnerships in industrialisation, green economy transition, and regional value chain integration.
- ❑ The Export Desk together with InvestSA coordinated and supported a 17-member South African business delegation representing the ICT, energy, healthcare, electro-technical, agro-processing, mining, automotive, and defence sectors. This included facilitating their participation in the Türkiye–Africa Business and Economic Forum (TABEF) and targeted bilateral engagements with Turkish companies arranged in collaboration with DEİK.

PARTICIPATION IN MINISTERIAL WORKING VISIT TO UNITED ARAB EMIRATES FROM 3-7 NOVEMBER 2025

- ❑ Coordination of the South African Business Delegation
The Export Desk together with InvestSA coordinated and supported a 71-member South African business delegation representing the ICT, energy, healthcare, construction, agro-processing, mining, automotive sectors. This included facilitating their participation in the South Africa- Dubai Chamber Business Engagements and Meetings.

MINISTERIAL SITE VISITS COORDINATION

- ❑ Minister Tau, accompanied by senior dtic officials, visited Hyperama, a South African owned retailer that sells products sourced exclusively from South Africa as part of the broader business programme. Minister Tau also presided on the official launch of UAE China South Africa Business Council which aims to promote trilateral trade and investment opportunities between the member countries.



Increased Exports

(8) Transformation and Inclusion Initiative

EEIP

- The Department is commencing with the process to review the B-BBEE policy. The amendment aims to contribute towards addressing the socio economic challenges of the country including unemployment, poverty and the inequalities. Furthermore, the review will ensure redress to deal with the history of exclusion and the legacy it has left as per the provision of the Constitution.
- The Frigoglass Top-Up EEIP application for top-up was approved (R 25 463 106 million).
- The International Business Machines South Africa (IBM SA)'s EEIP application was approved by the Minister for implementation. The investment amount from the EEIP will be aggregated as part of the Transformation Fund.
- Draft Amended Marketing, Advertising and Communication (MAC) Sector Code was submitted for approval. A comprehensive preliminary analysis of the draft Amended Sector Code was conducted and engagement took place with MAC Sector Charter Council for a feedback. Council is still attending to the matters that were raised.
- Engagements took place with Private Security industry, and Cricket South Africa on the requirement to develop a sector code for an industry.
- An total amount of R147 million was disbursed under EEIP during Q2 and Q3 towards support for black owned enterprises and SMMEs in sectors such as auto and ICT.

Transformation Fund

- Commitments secured from Afreximbank of USD3 billion (R51.8bn based on 13/10/25 exchange rate) over 5 years, UIF commitment of R500 million, and R400 Million from Mergers. Total commitments accounted for the quarter is R52.7 bn. Formal agreements are being worked on.
- The Draft Transformation Fund Framework which incorporates public inputs and comments was finalised and submitted to the Minister for approval. This includes Draft Statement 400 of the Codes of Good Practice and operation of the Project Management Office (PMO).
- A plethora of contributors have availed themselves to assist in the aggregation of this instrument of economic redistribution. In this regard a pipeline of funds to the value of R6.224 billion are at different phases of the pipeline development.
- It is expected that these will be concluded and signed off by end February 2026.

Social Employment Fund

- A total of 40 067 temporary work opportunities were created for the period under review.
- 63% participants comprised of youth, 67% are females, and 33% are males.
- Number of disabled persons: 1348 participants
- R268 377 176 was disbursed during Quarter 3.

(8) COMPETITION MATTERS

93 notifications received in Q2; Minister participated in 10 mergers (11%) based on public interest in Manufacturing, Wholesale/Retail Trade, Construction, Education, and Water Testing sectors.

121 notifications received in Q3; Minister participated in 4 mergers (3%) in Manufacturing and Agriculture/Forestry/Fishing sectors.

Large: Vodacom/Maziv Merger: Tribunal prohibited merger in Q3 FY24/25. Minister appealed; Competition Appeal Court overturned the decision in **Q2 FY25/26**, approving the merger with public interest conditions

Intermediate: Suzano S.A. / Kimberley-Clark IFP NewCo B.V. Merger: Minister intervened to preserve supply contracts with Mondi and promote B-BBEE objectives. **Q3 FY25/26**

Employment and Economic Impact (Q2)

- **5,343 workers** gained shares across finance, manufacturing, mining, media, and telecommunications.
- **R8.4 billion committed to SMMEs, women-, youth-, and disability-owned enterprises** (R7.9 billion for procurement); R5 billion disbursed to date (R4.8 billion for procurement).
- **10,106 permanent jobs created** in mergers and Enterprise and Supplier Development companies across retail, manufacturing, pharmaceuticals, and telecom sectors.
- **8,347 unemployed youth trained** through Youth Employment Service (YES Jobs).

Regulatory and Market Developments:

- Extension granted for Media and Digital Platform Market Inquiry (MDPMI) completion until 28 November 2025. Finalised in Q3.
- Draft Block Exemption Regulations for Export Promotion published for public comment (12 August 2025).
- Block Exemption for Phase 2 of South African Sugarcane Value Chain Master Plan gazetted (13 August 2025).

Economic and Employment Impact (Q3)

- **R80 million** committed to SMMEs, women-, youth-, and disability-owned enterprises (R41 million for procurement).
- **R172 million disbursed overall** (R100 million procurement), including R35 million EEIP and R268 million SEF disbursements.
- **650 permanent jobs created** across wholesale liquor, finance, automotive, and IT sectors.
- **9,510 unemployed youth trained** under Youth Employment Service (YES Jobs).

Regulatory and Market Developments:

- Draft regulations published for public comment on divestiture appeals under Competition Act Section 43D(2).
- Final block exemption regulations for export promotion published, exempting certain agreements from key Competition Act provisions.

Governance and Compliance:

- Appointment of Cabinet-approved nominees restored full operational capacity of the Tirisano Construction Fund Board.
- Compliance reports for Engen/Vivo and Shoprite/Massmart received and noted.

(9) Economic Research

Production of Trade & Market Intelligence reports

- ❑ Market intelligence and trade opportunities report focusing on **potential markets for the automotive sector within the AfCFTA framework.**
- ❑ Market intelligence and trade opportunities report focusing on **potential markets for the automotive parts and accessories sector.**
- ❑ Mapping **Trade and Market Opportunities in Digital Trade** for South Africa.
- ❑ Market intelligence and trade opportunities report focusing on the **Aluminium Industry.**
- ❑ Quarter 2 & 3 data analysis reports on **African market opportunities** to support manufacturing exports to African countries.
- ❑ Bilateral trade reports (**South Africa – India ; and South Africa – Japan**) to support increased Foreign Direct Investment (FDI), exports and outward investment.

- ❑ Produced quarter 2 & 3 Medium Term Development Plan (**MTDP**) **Progress implementation** report.
- ❑ Report on **Youth Skills Development Programmes for an Evolving Local Industrial Economy-** The report focuses on key policy issues on skills development and tries to unpack the way in which skills demand is impacting the occupational structure of the labour market, and what types of skills are needed.
- ❑ Report on **Digital Skills Mapping for Manufacturing and Trade-** The report focus on the changing demand by businesses and firms for skills driven by technological advances.
- ❑ Quarter 2 & 3 Survey reports on **Black Industrialists and Black Owned Businesses** tracking equity, turn- over, and performance of the BI/BO.

Policy Dialogue

- ❑ The Branch convened a webinar on **digital skills and digital transformation on the 28th of August 2025** which aimed to bring together external experts from government, academia, business and civil society to explore how South Africa can strengthen its digital economy through inclusive skills development, innovation and targeted youth employment strategies.

Overview of the Financial Performance – 31 December 2025

1 April 2025 → 31 December 2025

R 11.12 billion Adjusted Budget

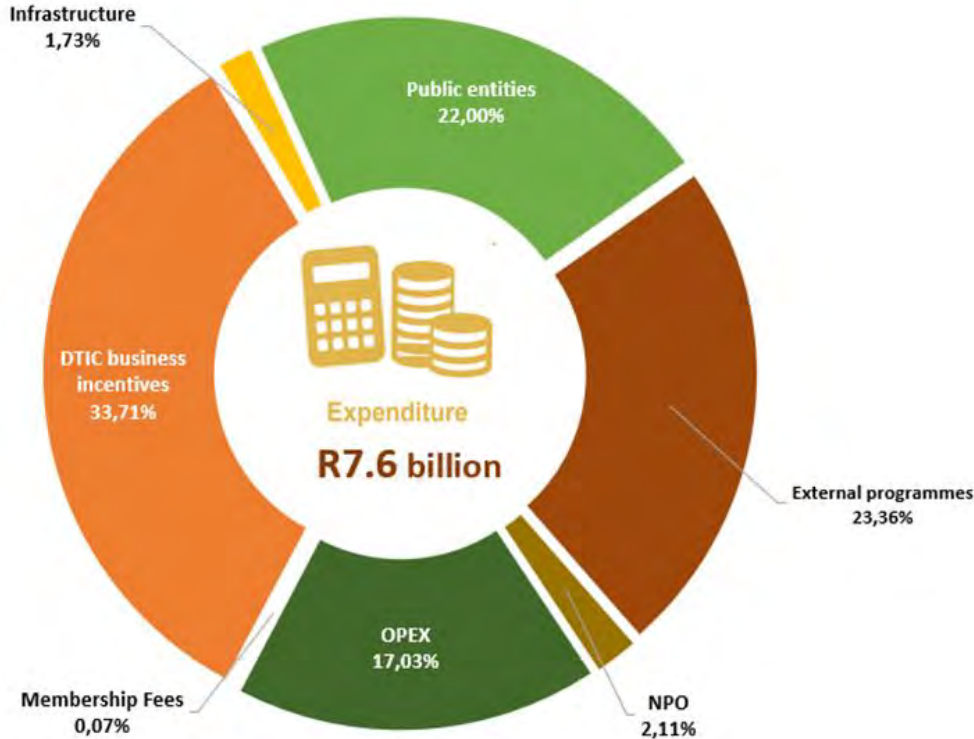
R 7.6 billion Spent as at 31 December 2025

Spent as % of budget = 67.9%

R7.6 billion was disbursed as follows:

- R2.7 billion** or **35.44%** - Beneficiaries across various incentive programmes (business and infrastructure)
- R1.8 billion** or **23.36%** - External programmes at the IDC and CSIR
- R1.7 billion** or **22.00%** - Public entities
- R1.3 billion** or **17.03%** - Operational costs
- R159.4 million** or **2.11%** - Non-profit organisations
- R5.3 million** or **0.07%** - International organisations of which South Africa is a member

Spending categories as % of total expenditure



Financial Performance Per Programme And Economic Classification

	Adjusted Budget 2025/26	Budget Available	% Budget Available	YTD Projections December 2025	Actual expenditure 31 December 2025	Variance between projections and expenditure	% Variance
Description	R'000	R'000		R'000	R'000	R'000	
Programme 1: Administration	1 069 471	427 858	40,0%	672 918	641 613	31 305	4,7%
Programme 2: Trade	315 692	85 622	27,1%	214 084	230 070	(15 986)	-7,5%
Programme 3: Investment and Spatial Industrial Development	159 409	55 723	35,0%	145 582	103 686	41 896	28,8%
Programme 4: Sectors	1 534 105	249 428	16,3%	1 315 968	1 284 677	31 291	2,4%
Programme 5: Regulation	407 261	77 334	19,0%	331 872	329 927	1 945	0,6%
Programme 6: Incentives	5 230 216	2 430 793	46,5%	3 747 245	2 799 423	947 822	25,3%
Programme 7: Export	385 274	102 551	26,6%	325 257	282 723	42 534	13,1%
Programme 8: Transformation and Competition	1 962 634	118 072	6,0%	1 860 515	1 844 562	15 953	0,9%
Programme 9: Research	64 587	29 209	45,2%	31 345	35 378	(4 033)	-12,9%
Total	11 128 649	3 576 590	32,1%	8 644 786	7 552 059	1 092 727	12,6%
Economic classification							
Current payments	2 079 949	801 713	38,5%	1 368 604	1 278 236	90 368	6,6%
Compensation of employees	1 118 311	361 302	32,3%	830 194	757 009	73 185	8,8%
Goods and services	961 638	440 411	45,8%	538 410	521 227	17 183	3,2%
Transfers and subsidies	9 038 843	2 765 987	30,6%	7 265 312	6 272 856	992 457	13,7%
Incentive payments	5 050 778	2 374 420	47,0%	3 605 058	2 676 358	928 700	25,8%
Department entities	1 838 958	177 781	9,7%	1 661 177	1 661 177	0	0,0%
External Programmes	1 923 944	160 145	8,3%	1 813 732	1 763 799	49 933	2,8%
Non profit organisations (Partnerships with business associations, NEDLAC)	170 705	11 242	6,6%	163 706	159 463	4 243	2,6%
Membership fees (International organisations)	48 453	43 125	89,0%	20 972	5 328	15 644	74,6%
Households	6 005	(726)	-12,1%	667	6 731	(6 064)	-909,1%
Payments for capital assets	9 857	8 890	90,2%	10 870	967	9 903	91,1%
Total	11 128 649	3 576 590	32,1%	8 644 786	7 552 059	1 092 727	12,6%

THANK YOU

