



the dtic **Performance Report**

Presentation to the Portfolio
Committee on Trade, Industry and
Competition

First Quarter Report
2025/26 Accounting Period
21 October 2025



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

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Presentation Overview

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Presentation Overview (2)

1. The Department has packaged the Q1 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 C for reference.



Economic Context

Global & Domestic Overview

Geo-Political Developments

SA Economic Growth Stalls

Fixed Investment has Fallen

SA Trade Still Holding Up

Global & Domestic Overview

- ❑ Global Gross Domestic Product (GDP) growth continues to slow and appears to be stabilising at pre-COVID 19 levels of 3.3 to 3.6% growth.
- ❑ Consequently, global GDP in 2024 grew by a modest 3.3%, having grown by 3.5% in 2023.
- ❑ Thus, the IMF's April World Economic Outlook reflects the significant uncertainty caused by the US' 'Liberation Day' announcement of the imminent imposition of high, unexplained tariffs across a wide range of developed and especially developing countries.
- ❑ The June '25 Global Economic Prospects update now lowers forecast GDP growth for the world economy from 3.3% to 2.3%.
- ❑ This is in large part due to:
 - Uncertainty created by the US;
 - Risk of spreading middle-East conflict and possible marine transport disruption; and
 - Rising fiscal pressures in the EU as pressure builds for it to increase defence spending.

Real GDP: WB Economic Prospects June'25 projections

(Percent change from previous year unless indicated otherwise)

	2022	2023	2024e	2025f	2026f	2027f
World	3.3	2.8	2.8	2.3	2.4	2.6
Advanced economies	2.9	1.7	1.7	1.2	1.4	1.5
United States	2.5	2.9	2.8	1.4	1.6	1.9
Euro area	3.5	0.4	0.9	0.7	0.8	1.0
Japan	0.9	1.4	0.2	0.7	0.8	0.8
Emerging market and developing economies	3.8	4.4	4.2	3.8	3.8	3.9
East Asia and Pacific	3.6	5.2	5.0	4.5	4.0	4.0
China	3.1	5.4	5.0	4.5	4.0	3.9
Indonesia	5.3	5.0	5.0	4.7	4.8	5.0
Thailand	2.6	2.0	2.5	1.8	1.7	2.3
Europe and Central Asia	1.5	3.6	3.6	2.4	2.5	2.7
Russian Federation	-1.4	4.1	4.3	1.4	1.2	1.2
Türkiye	5.5	5.1	3.2	3.1	3.6	4.2
Poland	5.3	0.2	2.9	3.2	3.0	2.9
Latin America and the Caribbean	4.0	2.4	2.3	2.3	2.4	2.6
Brazil	3.0	3.2	3.4	2.4	2.2	2.3
Mexico	3.7	3.3	1.5	0.2	1.1	1.8
Argentina	5.3	-1.6	-1.8	5.5	4.5	4.0
Middle East and North Africa	5.4	1.6	1.9	2.7	3.7	4.1
Saudi Arabia	7.5	-0.8	1.3	2.8	4.5	4.6
Iran, Islamic Rep. ²	3.8	5.0	3.0	-0.5	0.3	1.8
Egypt, Arab Rep. ²	6.6	3.8	2.4	3.8	4.2	4.6
South Asia	6.0	7.4	6.0	5.8	6.1	6.2
India ²	7.6	9.2	6.5	6.3	6.5	6.7
Bangladesh ²	7.1	5.8	4.2	3.3	4.9	5.7
Pakistan ²	6.2	-0.2	2.5	2.7	3.1	3.4
Sub-Saharan Africa	3.9	2.9	3.5	3.7	4.1	4.3
Nigeria	3.3	2.9	3.4	3.6	3.7	3.8
South Africa	2.1	0.8	0.5	0.7	1.1	1.3

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.

Geo-Political Developments

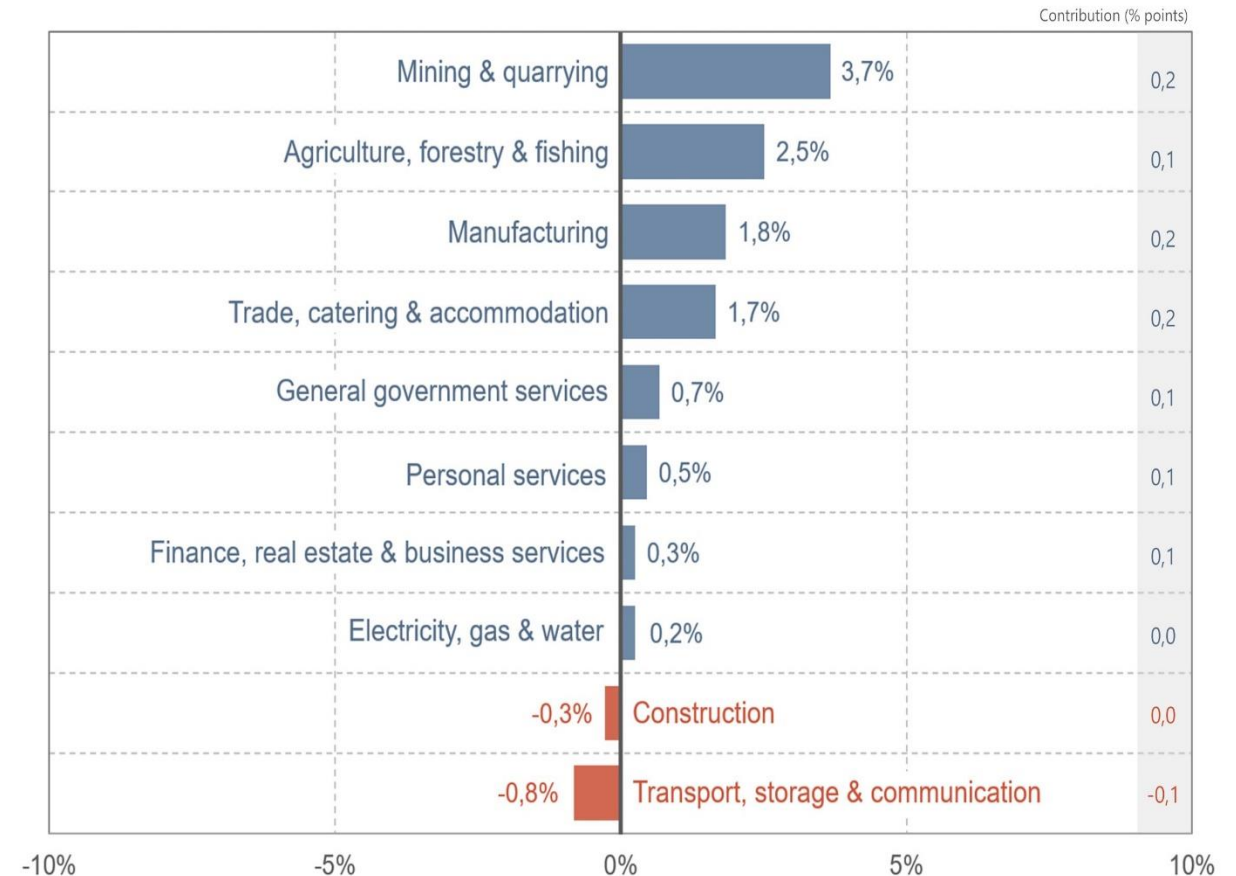
- ❑ The outlook for global growth has been revised lower due to erratic US trade policies. The constantly changing US tariff regime is causing significant uncertainty, increasing volatility in various financial markets.
- ❑ **US** growth forecast for 2025 has been reduced from 2.8% to 1.8% largely due to the expected consumer cost of increased tariffs, investor uncertainty and trade and tourism retaliation by the US' former allies.
- ❑ The US threat to impose an additional 10% tariff on **BRICS** nations should be taken seriously, and is likely to ironically increase BRICS status.
- ❑ The US-induced trade war and increased resistance to **China's** export-led orientation undermine the Chinese economy's ability to reach its 5% growth target. The number of countries that are investigating raising import duties on, especially Chinese steel and electric vehicles, is increasing as their domestic companies come under increased pressure.
- ❑ The recent flare-up in armed conflict between **India and Pakistan** highlights the significant geopolitical rivalries India faces with some of its neighbours. Should these rivalries lead to prolonged or escalated armed conflict, the perception of India as an alternative manufacturing location could come under scrutiny.
- ❑ Commodity prices have weakened as the global growth outlook deteriorated, although commodities linked to the green energy transition continue to encounter sustained demand.

SA Economy Grows Modestly

- ❑ After a very modest economic performance in 2024, with economic growth at 0.6%, recent economic indicators such as energy availability, mining and manufacturing output, and employment indicate that 2025 may be another challenging economic year.
- ❑ Q1 2025 growth was very weak at just 0.1%. Growth in Q2 2025 was significantly better with GDP growing by 0.8%.
- ❑ The recovery was broad-based with 4 sectors growing robustly (at more than 1%) and just 2 sectors contracted marginally.
- ❑ However, the outlook for GDP growth remains uncertain as both fixed investment and the purchasing managers' indices are quite weak.

Figure 1: Eight industries grew in Q2: 2025

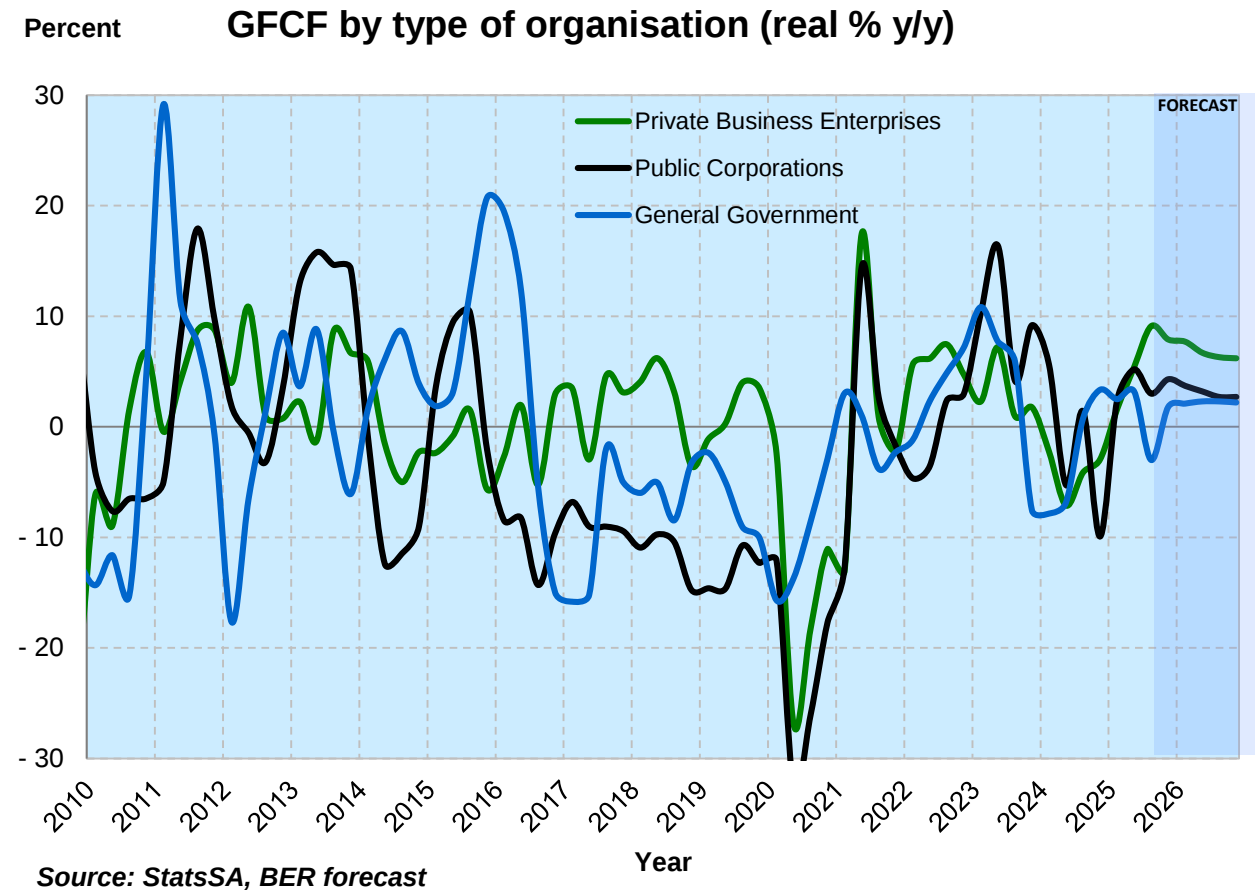
Industry growth rates. Q2: 2025 compared with Q1: 2025. GDP increased by 0,8%



Constant 2015 prices, seasonally adjusted Source: Gross domestic product (GDP), Second quarter 2025

Fixed Investment has Fallen

- ❑ Real gross fixed capital formation (GFCF), a broad indicator of investment in the country continues to underperform across all 3 components.
- ❑ The levels of investment in the manufacturing sector, measured as fixed investment as a proportion of value addition (GDP) are low at 14.5% in 2024.
- ❑ Business conditions over the next twelve months are not foreseen to improve, with manufacturing confidence declining during Q1 2025.
- ❑ Slow new mine development and investment will show in SA mineral exports over the next decade.



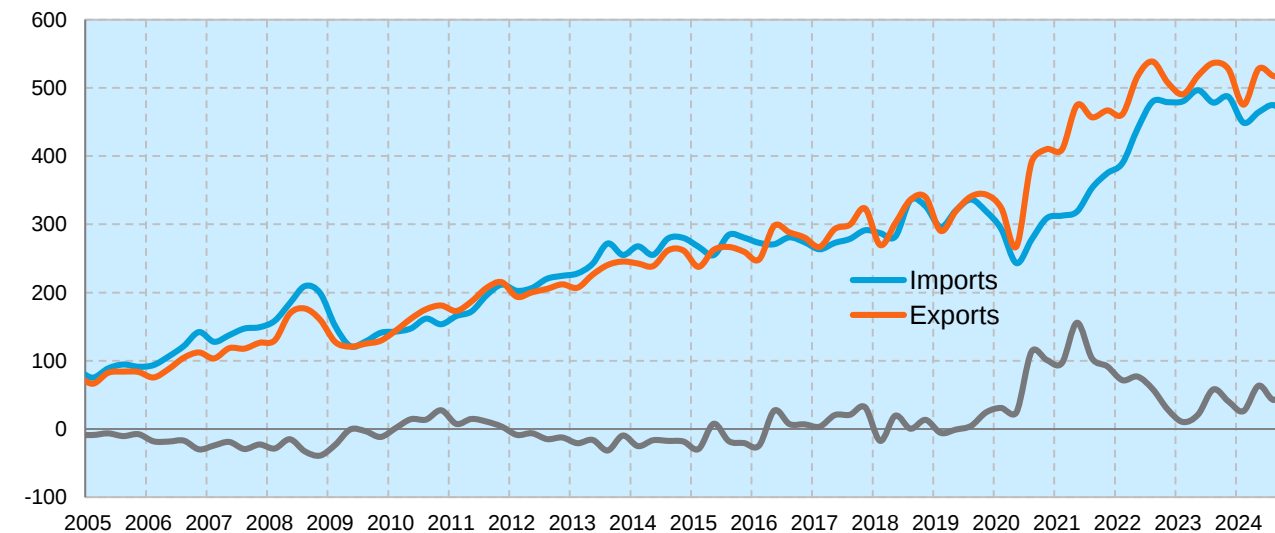
The global transition to green energy provides major opportunities for the SA and regional mining sector to supply copper, manganese and nickel, but we dare not miss this opportunity for transformation and industrial deepening.

SA Trade Still Holding Up

Exports have held up well

- ❑ One of the few positives of the otherwise gloomy economic picture in 2024 was in regard to South Africa's trade balance which strengthened markedly.
- ❑ This was mainly due to falling imports – manufactured imports fell by 6% - while a few export sectors managed to increase exports, including the electricity, gas, and water, and the agriculture, forestry, and fishing sectors.
- ❑ However, it remains to be seen if this trade performance can be maintained this year given tariff uncertainties.

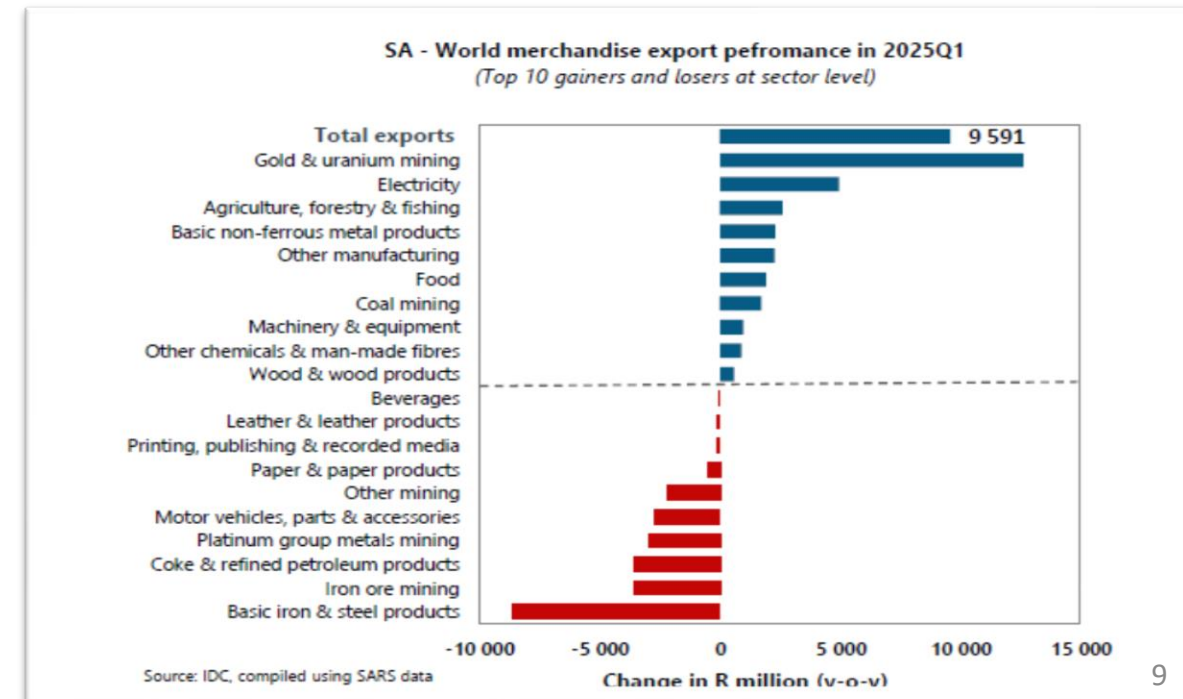
R billion per quarter Exports and imports to the world



Source: SARS, 2025

Impact of trade tension is sector-specific

- ❑ The Q1 2025 data gives a high-level sense of the sectoral impacts we may be facing.
- ❑ Gold prices are strong (but supply in SA is constrained).
- ❑ The largest losers are our sophisticated manufacturers such as Autos.
- ❑ Strategic sectors such as Basic Iron and Steel and refined petroleum products are similarly under pressure already.



Organisational Configuration & Vacancies

Addressing Portfolio Committee Concerns on:

Strengthening Corporate Governance through Organisational Structure Configuration and the Filling of Vacancies, Boards and Entity Executives



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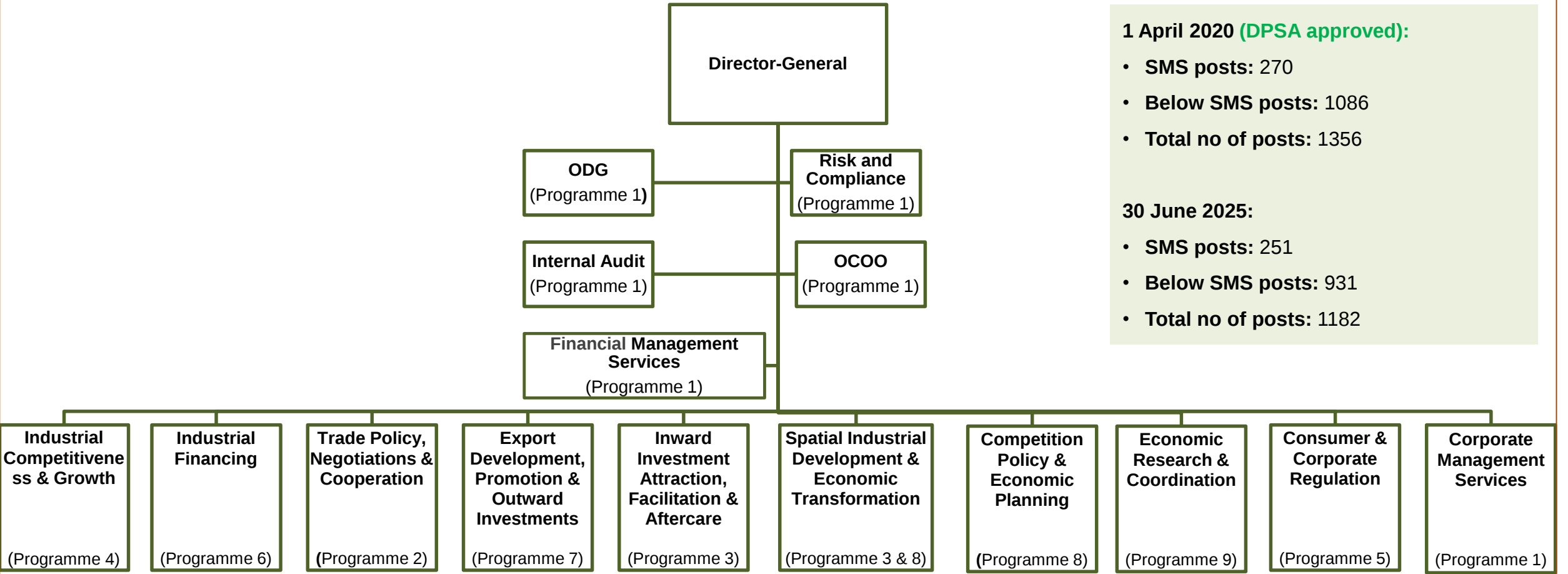
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the dtic Organisational Structure

Strengthening Corporate Governance - Organisational Structure Configuration

Approved organizational structure of the dtic



1 April 2020 (DPSC approved):

- SMS posts: 270
- Below SMS posts: 1086
- Total no of posts: 1356

30 June 2025:

- SMS posts: 251
- Below SMS posts: 931
- Total no of posts: 1182

the dtic Vacancies as at Q1

Vacancy Management Update (as at 30 June 2025)

- 366 total vacancies across the department
 - 83 prioritised and funded
 - 282 unfunded (to be activated as funding becomes available)
- Recruitment of 83 key posts initiated in three batches – at various stages of the process. Annexure A provides details of approved, advertised, and in-progress posts

Deputy Director-General (DDG) Posts:

- Shortlisting and interviews conducted on 13 July 2025 for:
- Spatial Industrial Development & Economic Transformation
- Competition Policy & Economic Planning
- Industrial Competitiveness & Growth

DDG: Departmental Operations – not supported by DPSA but remains critical to the Department’s structure and operations

Head Count 30 June 2025								
Branch	Total no of approved posts	Filled	Total Vacant posts	Unfunded	Funded prioritised vacancies	Total Vacancy Rate %	Unfunded vacancy rate %	Additional Filled
ADMIN	471	354	117	91	26	25	19	10
CCRB	71	59	12	8	4	17	11	2
CPEP	27	14	13	11	2	48	41	1
EDPOI	142	91	51	46	5	36	32	3
ERC	49	32	17	14	3	35	29	1
ICG	142	103	39	29	10	27	20	3
IFB	195	160	35	33	2	18	17	4
IIAFA	59	41	18	10	8	31	17	3
SIDET	104	61	43	28	15	41	27	4
TPNC	96	75	21	13	8	22	14	2
Total	1356	990	366	283	83	27	21	33

Recruitment of 83 priority posts: 67% Advertised 33% Shortlisted 18% Interviewed 0% Completed

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, with sign-off anticipated by September 2025.
- 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.

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

Culture project: The Terms of Reference for the culture project was approved and the bid advertised on 4 July 2025.

58 - Entity Board Appointments in Q1

11	Non-Proliferation Council
07	Takeover Regulation Panel
06	Board of Export Credit Insurance Corporation
07	Board of the South African Bureau of Standards
11	Board of the South African National Accreditation System
10	National Lotteries Commission Distribution Agency
05	Board of the Industrial Development Corporation

Members of the Non-Proliferation Council: - Ms Ditebogo Kgomo (Chairperson); - Dr Kelvin Kemm; - Dr Alison Lubisi; - Mr Gian Marcon; - Ms Kgaugelo Mogashoa; - Ms Elsie Monale; - Mr Sandile Ndlovu; - Ms Deidre Penfold; - Ms Lizell Reinecke; - Prof Bismark M Tyobeka; and - Dr Jaqueline Weyer.
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Members of the Takeover Regulation Panel: - Prof. Tshepo Herbert Mongalo - Ms Tintswalo Grace Mthembi - Adv. Mthokozisi Daluxolo Xulu - Ms Mmapitse Maubane - Ms Inga Ngalonkulu - Mr Bryan Kgosana Shuping - Ms Lungelwa Sonqishe

Members of the Board of the Export Credit Insurance Corporation: - Ms Delia Ndlovu (Chairperson); - Mr Sisa Mayekiso; - Mr Bheki Ishmael Mkhize; - Ms Philisiwe B. Mthethwa; - Ms Siobhain O'Mahony; - Mr Willem van der Spuy. Board exits since appointment: Mr Andile Mabizela – (Resigned)

Members of the Board of the South African Bureau of Standards: - Prof. Mzubanzi Bismark Tyobeka (Chairperson); - Mr Garfield Mario Bergstedt; - Mr Mavela Alford Velamuva Dlamini; - Dr Reabetswe Kgoroadira; - Ms Kgotatso Mohulatsi; - Ms Deidre Penfold; and - Mr Griffith Zabala. Board exits since appointment: Ms Tshepiso Tinyiko Matlapeng (declined the appointment)
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Members of the Board of the South African National Accreditation System: - Dr Tshengedzeni Demana (Chairperson); - Dr Dharmarai Naicker; - Dr Pulane Elsie Molokwane; - Mr Bruce Christopher Gordon; - Ms Nolitha Ntobongwana; - Ms Lebogang Ameliah Matlala; - Ms Anele Zukiswa Vutha; - Dr Nandi Malumbazo; - Ms Slindile Nomathemba Ndwandwe; - Mr John Mayiwane Vusumuzi Mazibuko; and - Ms Nomvula Pamella Mhlari

Members of the National Lotteries Commission Distribution Agency: - Ms Chickey Silvy Mofet-Mubu - Dr Zukiswa Yoliswa Zinhle Nzo - Mr Thulani Siyabulela Desmond Skosana - Ms Salome Francinah Sithole - Ms Maria Mpuley Nkopane - Ms Nomsa Mgida - Mr Mpho Tsedu - Mr Thembinkosi Matthews Josopu - Mr Goodwin Mnisi - Ms Victoria Floretta Ramela
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Members of the Board of the Industrial Development Corporation: - Ms Ayanda Dlodlo - Ms Tanya Reeve Cohen - Dr. Keitumetse Mothibeli - Ms. Gloria Tomatoe Serobe - Mr Reon Barnard Board exits since appointment: 1. Dr Sidney Mufamadi (Resigned); 2. Mr Sam Bhembe (Declined the appointment); and 3. Dr Nomusa Dube-Ncube (Resigned)
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Entity Executive Positions – Q1 (as at 01 September 2025)

No	Entity	Positions
1	CIPC	Executive Manager: Business Regulation and Reputation
2	Comp Comm (4 Positions)	- Deputy Commissioners x2, - Divisional Manager: Advocacy - Divisional Manager: Market Inquiry
3	ECIC (2 Positions)	- Chief Executive Officer - Chief Operating Officer
4	IDC (5 Positions)	- Divisional Executive: Industry Planning & Project Development (IPPD) - Divisional Executive: Mining, Metals, Infrastructure & Energy (MMIE) - Divisional Executive: Manufacturing - Chief Operating Officer - Chief Risk Officer
5	ITAC	Deputy Chief Commissioner
6	NCC	Commissioner
7	NCR (2 Positions)	- Chief Executive Officer - Deputy Chief Executive Officer
8	NCT (3 Positions)	- Strategic Oversight Executive - Chief Operating Officer - Chief Governance Officer

No	Entity	Positions
9	NEF	Divisional Executive: Venture Capital & Corporate Finance
10	NGB	Chief Executive Officer
11	NLC	Company Secretary
12	NMISA (5 Positions)	- Chief Executive Officer - Director: Regional, International Relations and Innovation - Director: Corporate Services - Director: Physical Metrology - Director: Metrology for Regulations
13	NRCS (2 Positions)	- Chief Executive Officer (CEO) - Deputy Chief Executive Officer
14	SABS	Chief Executive Officer (CEO)
15	SANAS	Chief Executive Officer (CEO)
16	TRP	Executive Director

Entity & the dtic Summary of Q1 Performance

Entity Q1 Performance &
The dtic Q1 APP Performance



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Entities' Q1 APP Performance

The following tables are a summary of **the dtic entities'** Q1 APP performance. Explanations on reasons for deviation and ccorrective actions are attached as a separate Annexure B

No	Entity	2025/26 Q1	Budget
1	Broad-Based Black Economic Empowerment (B-BBEE)	93%	N/A
2	Companies and Intellectual Property Commission (CIPC)	80%	85%
3	Companies Tribunal	63%	21%
4	Competition Commission (CompCom)	91%	96%
5	Competition Tribunal	94%	91%
6	Export Credit Insurance Corporation (ECIC)	50%	17,65%
7	Industrial Development Corporation (IDC)	15%	90,5%
8	International Trade Administration Commission (ITAC)	68%	95%
9	National Metrology Institute of South Africa (NMISA)	83%	76%
10	National Consumer Commission (NCC)	93%	93%

No	Entity	2025/26 Q1	Budget
11	National Consumer Tribunal (NCT)	100%	93%
12	National Credit Regulator (NCR)	65%	80%
13	National Empowerment Fund (NEF)	43%	83%
14	National Gambling Board (NGB)	100%	21%
15	National Lotteries Commission (NLC)	71%	78%
16	National Regulator for Compulsory Specification (NRCS)	88%	87%
17	South African Bureau of Standards (SABS)	71%	Info not available (Cyber Attack)
18	South African National Accreditation System (SANAS)	92%	103%
19	Takeover Regulation Panel (TRP)	100%	75%

11

- Achieved (80% and above of Q1 targets achieved)

06

- Not Achieved (50% and below 80% of Q1 targets achieved)

02

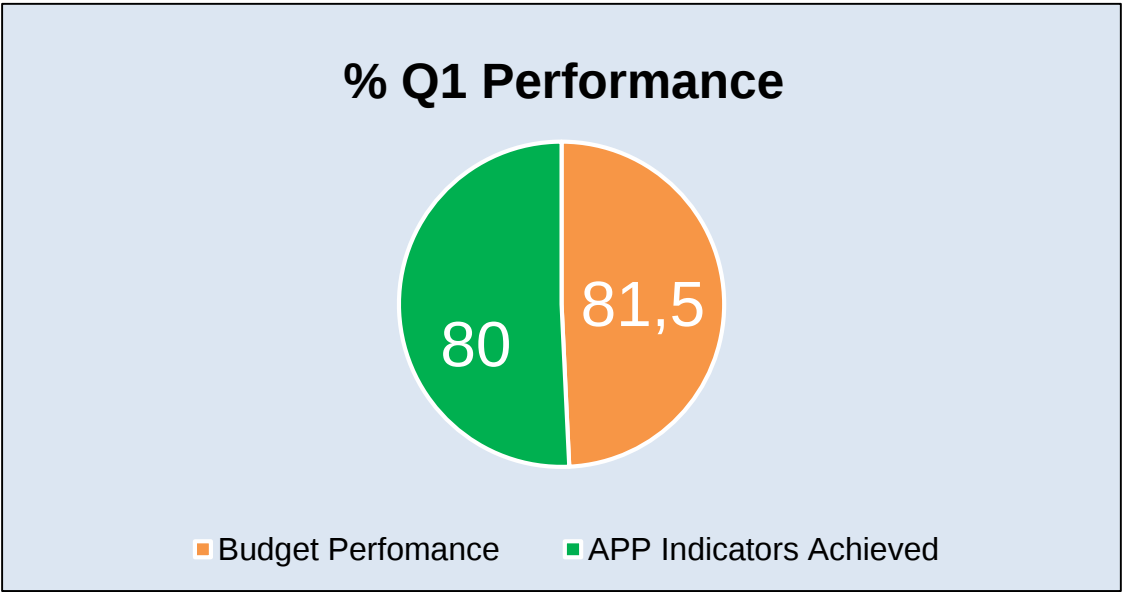
- Not Achieved (Below 50%)

the dtic Strengthening Entity Oversight and Governance through:

- ☐ Monthly and quarterly tracking of performance of entities,
- ☐ Monthly and quarterly tracking of implementation of corrective measures identified,
- ☐ 80% achievement of targets included in shareholder's compacts,
- ☐ Stabilise leadership by ensuring Boards and CEO vacancies are filled,
- ☐ Monthly and quarterly review of management accounts,
- ☐ Monitor progress on implementation of risk actions and clearing of audit findings,
- ☐ Re-establish the CFO forum to share information and develop the same approach to finance issues,
- ☐ Develop a reporting dashboard for entities to supplement the National Treasury Quarterly reporting template

Overview of the dtic Q1 Performance

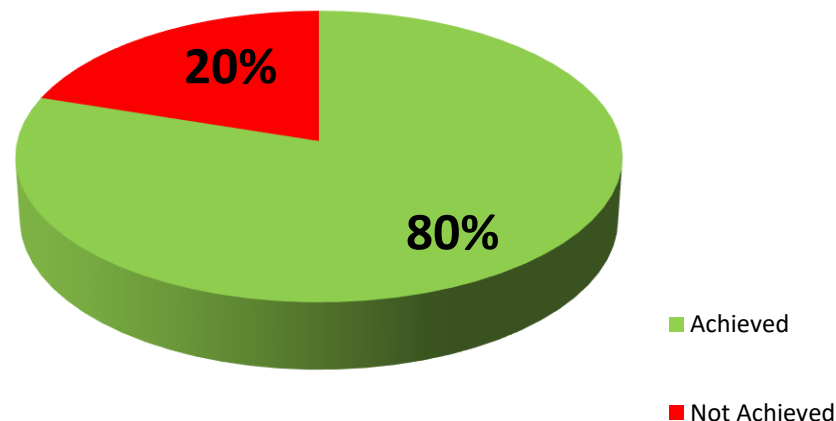
71	Number of indicators for the 2025/2026
25	Number of Indicators with Q1 targets
20	Number of targets achieved in Q1 (20 out of 25)
80%	% Achievement for Q1
81.5%	% Budget Achievement against Q1 budget allocation
27%	Vacancy rate as at Q1
990	Number of Filled posts
366	Number of Vacant posts



Programme	Total No of Indicator s	Q1 Indicators with Targets	Number of targets achieved	Total Q1 Budget Allocation	Total Budget Spent (Q1)
1: Admin	8	2	1	222 984	204 384
2: Trade	11	1	1	135 590	137 104
3: Investment & Spatial	13	5	3	38 471	31 586
4: Sectors	9	9	9	640 425	641 919
5: Regulations	4	1	1	212 672	182 564
6: Incentives	6	2	2	694 037	737 522
7: Exports	6	0	0	214 936	199 753
8: Competition & Transformation	7	4	2	959 579	401 911
9: Economic research	7	1	1	10 671	12 268
Totals	71	25	20	3 129 365	2 549 010

The dtic Q1 APP Performance

Q1 Departmental Performance



25 Planned Q1 Targets
20 Achieved
5 Targets Not Achieved

Targets not achieved:

- 58% / 100% of entities (11 out of 19) achieved a minimum of 80% Performance in Q1.**
 - The target was not achieved in Q1. The reasons for variance and corrective actions vary per entity. Reasons for variance are summarised in Annexure B on entity performance.
- Development of an implementation plan target related to number of Demand-led skills plans in place for each masterplan developed.**
 - Reason for Deviation:** The process of consultations with internal and external stakeholders and the development of a draft template took longer than anticipated. These activities were essential to ensure alignment, clarity of roles, and a standardized approach.
 - Corrective action:** Work on the implementation plan commenced in Q1.
- R9.3bn / R20bn of investment attracted through greenfield and brownfield investments in targeted sectors including Special Economic Zones and Industrial Parks.**
 - Reason for deviation:** The variance is due to several investments still being in the pipeline and pending verification. These projects have secured indicative commitments but await formal confirmation .
 - Corrective action:** Verification processes are underway to ensure accurate and compliant reporting.
- R3bn of Transformation fund aggregated and disbursed.**
 - Reason for Deviation** - Delays in aggregation of funds for the Transformation Fund due to the finalisation of stakeholders' specific agreements and implementation model.
 - Corrective action:** Prioritise stakeholders engagements and finalisation of partnership agreements for aggregation of funds.
- 4 793 / 20 000 Unemployed youth trained under the Youth Employment Service (YES) - .**
 - Reason for Deviation:** A slow uptake in commitment by participating companies that resulted in delays in the recruitment into the YES Programme.
 - Corrective Action:** Intensify recruitment efforts in collaboration with stakeholders during the subsequent quarters to ensure targets are met.

the dtic Q1 Performance Highlights per Programme

Programme Q1 Performance



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(2) Trade: G20 Trade and Investment Working Group



Solidarity

Equality

Sustainability

4 Priority areas advanced in the 1st & 2nd meetings of the G20 Trade and Investment Working Group:

- 1. Trade and inclusive growth** – this agenda item is aimed at building on previous G20 presidency's Trade for Growth and Prosperity agenda with a view to work towards principles to guide G20 Members to foster inclusive growth and sustainable development. This will include the development of the G20 Africa Cooperation Agenda. An important segment of this theme should address common or shared challenges resulting from distributive effects of trade with adverse outcomes for economically excluded regions within countries. A compact for social inclusion should offer strategies that enable G20 countries to respond to these challenges and build resilience in communities.
- 2. Responsive trade and investment agenda to address the challenge of global commons**, covering matters of climate change, digital inclusion, preparedness for future pandemics, food security, resilience and diversification of global value-chains to promote sustainable development. This will also include the identification of the trends in the Investment Treaty Regime and a reform toolbox for addressing the global commons, including the energy transition.
- 3. G20 framework on green industrialisation and investments** - with a view to ensure progress towards the grand bargain that promotes value addition of critical minerals close to the source and the development of low-carbon manufacturing value chains which can support global decarbonisation and industrial adaptation.
- 4. WTO Reform** – deliberation on the development dimension of the WTO, including WTO reform, with the expected outcome being a Statement on the WTO.

Challenges: Global consensus on trade is a challenge due to unilateral and protectionist measures implemented by some G20 members.

Way forward: SA Presidency's will further continue to prioritise and develop the G20 Africa Cooperation Agenda. This initiative aims to unlock the untapped potential of the Continent for inclusive growth and development. The Initiative to be launched at the Summit focusses on three elements; first is support for the AfCFTA, including voluntary G20 contributions to the Adjustment Fund; the second is mobilisation of investment for industrialisation in key sectors that have huge potential for growth, are critical to Africa's resilience and key to leverage its youth dividend and three, to mobilise investment in key trade corridors to close infrastructure gaps. The dtic is working closely with the African Union, AfCFTA Secretariat, African Development Bank and AUDU-NEPAD on the proposed G20 Africa Cooperation Agenda to ensure that it is aligned with the priorities set out by the AU Heads of State and Government and leverage on work already done such as the infrastructure development projects already identified through the AU processes.

(2) Trade: G20 Trade and Investment Working Group (2)



(2) Trade: AfCFTA, SACU, BRICS, Trade and Investment Packages

Implementation of the AfCFTA – Protocols

Protocol on Women and Youth in Trade and Protocol on Competition Policy tabled in Parliament for ratification on 4 June 2025.

Once ratified, South Africa will deposit its instruments of ratification with the African Union Commission. The Protocols will enter into force once 22 Member States have deposited their instruments of ratification.

AfCFTA – 5 Priority services sectors

SA's commitments on **5 priority services sectors** (Financial, Transport, Tourism, Communications and Business) submitted to the AfCFTA Secretariat for technical verification and consideration by the AfCFTA Institutional Structures.

SA's schedule of commitments clarify limits of market access for services into SA from African trading partners and fosters transparency, predictability, and security for SA in the continental trade market.

SACU

Joint **SACU** Ministerial statement issued on 12 May 2025 on agreement to address global challenges on trade. Further agreement reached to collaborate in the auto value chain through a joint SACU private sector engagement to unlock regional value chains and unlock SACU positions on AfCFTA Rules of origin on autos.

BRICS

SA positions advanced in **BRICS** resulting in a Joint Ministerial Statement on coordinated messages to respond to the current challenges facing global trade, enhancing the voice of the global South. In the context of the current global trade dynamics, ensures a coordinated BRICS voice;

Identifies areas to promote intra-BRICS trade and investment. BRICS Economic Strategy 2030 is being developed to enhance mutually beneficial cooperation among BRICS Member

USA Framework Package

SA submitted a framework package on 20 May 2025 to the **USA** to enhance mutually beneficial trade and investment relations.

This Framework Agreement aims to create predictable market access for South African exports to the US, address market access barriers, enhance mutually beneficial trade and investment, promote bilateral supply-chains, commercial relations, predictability in trade relations.

Trade and Investment Packages

Concluded for engagements with China, Middle East, France and Russia. These trade and investment packages aim to diversify exports to these markets and increase investment from these countries into South Africa.

(3) Special Economic Zones (SEZ):

1. On 26 June 2025, an **extended SEZ CEO's forum** took place at the IDC, where the **Spatial Industrial Development Strategy** was introduced to all key stakeholders. The strategy proposes a new model of governance, which will ensure that the implementation of the SEZ Programme and Industrial Parks catalyses' economic activity within identified regions, spilling over to the broader economy, particularly in neglected township and rural areas.
2. Minister published his intention to **designate the proposed Fetakgomo-Tubatse SEZ** for public comment, affording the general public thirty days to comment on the proposed development from 20 March to 9 May 2025. On 10 April 2025, a public consultation session took place at the site of the SEZ. The session was hosted by **thedtic**, in partnership with the Limpopo Provincial Government, Sekhukhune District Municipality and Fetakgomo-Tubatse Local Municipality.
3. A public consultation phase for the **expansion of the Coega SEZ** to establish a Pharmaceutical and Vaccine precinct started on 5 March to 17 April 2025. A second public engagement session was held on 7 April 2025 at the Aspen Pharmaceutical company site with a number of key stakeholders.



COEGA SEZ

On 7 April 2025, the opening of the **Atlantis SEZ Zone 1** and the Quantum V3 Sod-Turning ceremony took place in Atlantis. This marks the commencement of the **SEZs first investor in the zone**. The Atlantis SEZ Zone 1 opening and Quantum V3 Sod-Turning ceremony marks a significant milestone in the region's journey toward sustainable industrial growth. This event serves to strengthen partnerships and foster collaboration among key stakeholders, with a focus on the practical implementation of the just transition in Atlantis. By bringing together industry leaders, government representatives and the local community. The event highlighted the Atlantis SEZ's role in driving green industrialisation, creating economic opportunities, and positioning South Africa as a leader in the global sustainability transition. The ceremony was attended by Former Deputy Minister Andrew Whitfield and Alderman James Vos representing the City of Cape Town.

(3) Industrial Zones Programme (IZP):

Musina Makhado SEZ :

A Project Turn-Around Plan has been developed to revive progress on the Northern SEZ site. The Implementing Agent role was formally awarded to IZP, solidified through a signed Memorandum of Agreement (MoA) with Musina Makhado SEZ. Design reviews and integration of bulk infrastructure are actively underway. Critical coordination was initiated with the Department of Water & Sanitation and Vhembe District Municipality for a potable water supply solution. Preparations are advancing for township establishment applications for both Northern and Southern SEZ sites which will be submitted to the relevant municipal planning tribunals.



Nkomazi SEZ :

DP World approved the project budget and provided a lease agreement pending final review. A Roads Master Plan has been developed, prompting layout revisions and a Town Planner appointment is in advanced stages. The appointed service provider is finalizing the Feasibility and Business Case for submission in July 2025. All professional service providers (PSPs) are on track, with final reports due by 30th September. The Board is fully operational and the CEO and team managing daily operations and recruitment for key roles underway.

(3) Industrial Parks (IPs), Space Affairs, Energy One Stop Shop

Industrial Parks (IPs)

1. 5 – IPs Business Cases assessed :

Business cases & applications assessments for CIP funding approval:

- Ezakheni Industrial Estate (KZN);
- Komani Industrial Park (EC) and,
- Collins Chabane Industrial Park (LP):
- Laborie Industrial Park (GP)
- Marksman IP

Further 6-IPs are undergoing evaluation and consolidation of business cases

2. New investments and job

opportunities: 2-Precinct development plans conceptualized for expanded opportunities / diversification in the following regions:

- Greater Tzaneen Economic Development Precinct – catalysed by Nkowankowa IP (LP) and,
- Thabong Economic Development Precinct - catalysed by Matjhabeng EIP (FS)

Energy One Stop Shop

Unlocked the following 6 Obstacle Authorisations at ATNS/CAA:-

- Hendrina North Wind Energy:
- Ummbila Emoyeni Four WEF
- Nyala Solar Power Plant (RF) Pty Ltd
- Naos Solar PV Project One
- Oryx Solar Power Plant (RF) Pty Ltd
- Norsk Solar South Africa

Unlocked 4 DMRE challenges of Section 53 (land use) Approvals for the following companies:-

- Cullian Energy (Pty) Ltd
- Cetus Energy
- Makola Solar 1 (Pty) Ltd
- Makola Solar 2 (Pty) Ltd

Unlocked 2 DWS challenges for water licences for the following companies:-

- Phala Solar
- Ummbila Emoyeni

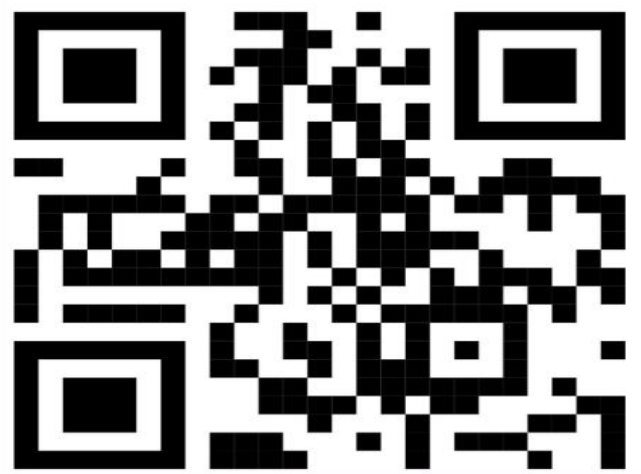
SPACE AFFAIRS

hosted the **16th Africa Regional Round: Manfred Lachs Space Law Moot Court Competition** at CSIR on 22 to 23 May 2025. The competition started at regional stages, with four regions namely Africa, Asia Pacific, Europe and Latin America. The African regional rounds took place in Pretoria, South Africa, where law students from universities across Africa competed to represent the continent at the world finals.

Participating teams were from Nigeria, Kenya, Uganda, Zimbabwe and South Africa. The two-day affair concluded with a prestigious awards ceremony, which saw Strathmore University of Kenya emerging victorious, securing the top spot and the honour of representing the African region at the global finals at the 75th International Astronautical Congress (IAC) in Sydney, Australia later this year. Midlands State University of Zimbabwe took second place, and Ambrose Alli University of Nigeria finished third.

As part of the investment mobilisation drive, we compiled an investment project book of 65 highly curated projects that are bankable and feasible to the value of USD 40Bn

SCAN



MORE ON THE INVESTMENT PROJECT BOOK 2025

FOR FURTHER INFORMATION
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the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

invest SA

(4) Sectors: Re-Industrialisation

- The revised **draft National Industrial Policy (NIP) was submitted** during the period under review. The NIP identifies priority sectors such as the battery value chains, automotive sector, steel, metal fabrication and aluminium sector, security of supply in the oil and gas sector and pharmaceuticals and vaccines. An emphasis is also made on emerging priority areas such as the critical minerals, green industries, digital economy as well the cannabis and hemp sectors. These sectors provide an opportunity for South Africa to access global markets through the export of products and services. Aggressive beneficiation of critical minerals will have multiplier effects for the South African economy and will provide the country with niche export markets, which are projected to grow exponentially over the years. **The NIP will undergo a consultative process through NEDLAC, Economic cluster to secure alignment across government and buy in in resolving the bottlenecks that exist within the economy.**
- **Hemp and Cannabis Commercialization Policy** was **approved by the DG** and is undergoing consultation with key stakeholders. The Terms of Reference (ToR's) of the existing Cannabis Master plan were reviewed and it's envisaged that it will incorporate the work on Hemp to have an inclusive Cannabis and Hemp Master plan.
- **National Critical Minerals Strategy** was **approved by Cabinet** and included a chapter on regional integration. The strategy seeks to position South Africa as a globally competitive, responsible, and inclusive player in the extraction, processing, and beneficiation of critical minerals, with a focus on catalysing green industrialisation, export competitiveness, and regional value chain development.
- **South Africa's capabilities, innovation and reputation in boatbuilding** - Southern Wind's yacht "SW108 Kiboko4" has been named the winner of both the "Sailing Yacht" category and the coveted title of "Sailing Yacht of the Year" at the 20th edition of the Boat International World Superyacht Awards. The prestigious ceremony, which celebrates the finest superyachts launched in the past year, took place on May 3rd, 2025, at the historic Arsenale di Venezia in Venice, Italy.
- The **Minister of the dtic Parks Tau, signed-off on National Building Regulations and Building Standards Amendment Bill (NBR) Submission on 16 April 2025 and approved the amendment of the Act in its entirety**, rather than to deal with only those Sections that were declared unconstitutional. The NBR Amendment Bill formed part of legislative presentation to Portfolio Committee on 17 June 2025. The Act is outdated and predates the Constitution. As a result of this, certain Sections of the Act have been successfully challenged in Court, thus necessitating the amendment of the Act to address these Constitutional and other legislative gaps within the current Act. The uniform application throughout South Africa will contribute to the ease of doing business and positively impacts on the construction industry.

(4) Sectors: Enhancing competitiveness and job creation

Industrial and Investment Highlights – 2025

Hexing Group – ZLink Factory, Midrand

- Officially opened on 26 June 2025, this R10 million facility manufactures ultrasonic smart water meters, using ultrasonic sound waves to measure water flow. The project demonstrates a strong commitment to South Africa's manufacturing and water infrastructure sectors and created 20 new jobs, predominantly for women, in engineering, technical, and administrative roles.

Liebherr & All Lift – Crane Assembly & Export

- Liebherr will import crane components ("kits") while All Lift is upskilled and certified (training cost R10.2 million) to handle the final 20% of assembly and disassembly. Cranes will be assembled/disassembled locally and at foreign ports, with Liebherr establishing a RSA business unit employing local staff. Local harbours, such as Saldanha Bay, will serve as export points. Impact: 100 indirect jobs, 50 retained jobs; total revenue R171,570,000.

Battery Minerals Investment Seminar – April 2025

- In partnership with the UK Foreign Commonwealth Development Office (FCDO), the seminar generated an investment pipeline of 15 projects valued at R40 billion. The IDC and Invest SA are facilitating commercialization of these projects.

Damen Shipyards – Maritime Services

- South African providers will offer ship repair, maintenance, logistical support, and technical documentation. Local companies, including Damen Shipyards Cape Town (DSCT), will support operations in Sudan. Impact: 8 direct jobs, 49 retained jobs; total revenue €2,088,000 (~R43,066,670).

(4) Sectors: Localisation

New ACTOM Fan Manufacturing Plant Boosts Local Industrialisation

- **Official Opening:** Minister of **the dtic**, Parks Tau, inaugurated the R32 million state-of-the-art ACTOM Fan Plant in Driehoek, Germiston on 29 May 2025.
- **Purpose:** Manufacture large-scale industrial fans for energy, mining, and food processing – supporting domestic infrastructure and regional exports.
- **Skills Development:** Training centre established; 80 youth enrolled as apprentices, promoting job creation and skills transfer.
- **Localisation Impact:** Expected to reduce import dependency and enhance global competitiveness.

Procurement Highlights:

- **Public Sector:** R14.9 billion spent on local goods/services across Steel, Clothing & Textiles, Furniture, Cables, Transformers & Valves.
- **Private Sector:** R1.1 billion reported in local procurement (Electro-technical & Metals industries).
- **Hexing ZLink Water Meter:** Currently 40% local content; target 70% with branch support.
- **Benefiting Local Industries:** Cable; Plastics (Injection Moulding); Electronics (PC Boards); & Packaging

Transformation

- The Sugar industry pledged **R2.1bn transformation fund** over the next 5 years (Sugar Master Plan). This pledge is part of the industry International Trade Administration Commission (ITAC) reciprocal commitment to increase the Dollar Based Reference Price (DBRP). The DBRP is a benchmark used to determine import duties on sugar.

(4) Sector Master Plans

1

Master Plan: Sugar

1. Industry spent R1,244 billion as part of industry transformation, to date. The allocated fund was R1 billion over a 5-year period.
2. Premium Price Payment (PPP) was introduced as an interim measure for Small Scale Grower (SSG's) support. A minimum of R60 millions of PPP was allocated to SSG's for a period of three seasons (2021/22 to 2023/24) was allocated, escalating annually to R68 051 340 in the 2023/24 season. 2023/24 was the last year of PPP. However, this has been extended to 2024/25 and 2025/2026.
3. Funds were distributed against the backdrop of severe challenges that continue to plague the industry, including cheap foreign imports, the Health Promotion Levy (HPL), the unrest in July 2021, the war in Ukraine, and the 2022 floods.

2

Master Plan: Poultry

1. Broiler production increased from 20.4 million birds per week in 2020 to 21.9 million birds per week in 2024.
2. In the period 2019 and 2024 since masterplan implementation begun the aggregate chicken meat inclusive of fresh, frozen, whole, cut into pieces and offal displayed a 17% growth in exports.
3. R1.29 billion approved through the IDC/DALRRD Agri-Industrial Fund to support broiler/chicken value chain players' increased infrastructure capacity:
4. 11 black commercial contract farmers, 1 hatchery company, 1 breeder, and 1 abattoir integrated producer were supported.
5. Land Bank launched a R3.2 billion blended finance scheme with DALRRD to support poultry farmers and other Agricultural projects. Two (2) applications were approved at the value of R31.84 million.

3

Master Plan: Furniture

1. Capital Investment

- PG Bison **R2.62 billion** invested in Boksburg Mill and Mkhondo. The new production line in Mkhondo was commissioned and was officially launched on the 08th of October 2024

2. Furniture Challenge Fund

- IDC approved five deals for the value of R75.9m, R37.5million from the dtic (MCEP) fund, and R38.4 from the IDC fund.
- NEF approved ten deals totalling R40 million. All approved transactions are 100% black-owned, 3 of which are over 50% women-owned.

4

Master Plan: Medical Tech

Regulatory

- With support Meddic, the MP will review and streamline existing regulations to remove redundancies., align laws and policies and close legislative gaps.
- A key is to draft a stand alone act for the sector as well harmonise regulatory frameworks with other African continent enabling market access.

Market Growth

- With support from the LSF, Identify high-import products with potential for local manufacture with public and private hospitals, linking to the Sector's capability.
- Align procurement practices with NHI to prioritise localisation.
- Find solutions to expedite settlement of outstanding government debt to suppliers

5

Master Plan: Cannabis

1. The Hemp and Cannabis Commercialisation policy was approved by the DG, currently undergoing consultations with key stakeholders.
2. 2 Standards have been adopted -SANS8398 (quality management systems) and SANS8309 (Stability testing for Cannabis based products).
3. Two hemp seed varieties were registered and listed in the National Seed Variety List – these are ARC-CAN-1 and ARC-CAN-3 while ARC IM-27 was recently submitted for cultivar registration.
4. The African Legacy Cannabis Programme led by CSIR and ARC (co-funded by the DSBD, DLRRD and Gauteng Agriculture) supported and graduated 23 SMMEs with over 46 commercial products (therapies, cosmeceuticals, nutraceuticals, and health infusions

(4) Sector Master Plans (1)

6

Master Plan: Automotive

- 1. APDP Amendments:** Amendments of the Automotive Production and Development Programme Phase 2 Legislative Framework for the Inclusion of Electric Vehicles and Associated Components have been completed.
- 2. AIS Guidelines:** The relevant amendments to the existing Automotive Investment Scheme (AIS) guidelines are being finalised to align with APDP 2 amendments and the EV legislative framework.
- 3. Tax Incentives (National Treasury):** The Taxation Laws Amendment Act, gazette on 24 December 2024, introduces a 150% capital allowance for qualifying investments in EV and hydrogen vehicle production. It covers assets such as buildings, plant, and equipment brought into use between 1 March 2026 and 1 March 2036. This incentive followed public consultation processes conducted by National Treasury and SARS in Q3.
- 4. Battery Value Chain Development:** A national Critical Minerals Strategy and Battery Value Chain Master Plan are being developed in collaboration with the DMRE, DTIC, and World Bank. Various workshops have been conducted aimed at building regional supply chain capacity.
- 5. Skills Development & Certification:** A comprehensive Skills Gap Analysis was completed under the EV Skills Work stream. Curricula and certification programmes are now being developed with TUT, CPUT, DUT, and UNISA.

7

Master Plan: R-CTLF

Localisation & Competitiveness

- 80million additional garments identified for localisation through targeted engagements with NCRF retailers by Localisation Support Fund.
- Over 106 million garments made more competitive through the woven fabric rebate.
- Masterplan signatories are projected to purchase 414 m local CTFL units in 2025 (+68.3% vs 2019), with demand forecast to grow 6.8% in 2026.

Funding & Programme Support

- By Q1 2025, the CTFL Growth Programme (IDC-administered) approved R2 358.7 m in grants/loans, disbursing R1 834.6 m to 188 businesses.

Market Access & Promotion

- ProudlySA E-commerce platform launched; NCRF support driving registrations from CTFL sector; other platforms are improving access for local manufacturers.

Sales & Growth Trends

- Retail sales in 2025 Q1 are 11.05% higher than the same period in 2024.
- Manufacturing sales recovered post-COVID:15.53% increase in 2023 compared to 2019. 4.92% growth in 2025 Q1 vs the same quarter in 2024.

8

Master Plan: Steel and Metal Fabrication

- **Ferrous scrap metal Price Preference System (PPS) discount review:** On 14 April 2025, the Minister issued a Trade Policy Directive (per Section 5 of the ITA Act) for an urgent investigation and review of the 30% PPS discount. ITAC published a PPS discount review notice on 8 May 2025, with public comment which was due on 23 May 2025.
- **The export tax (on ferrous scrap) review** – has already began to assess the impact and the efficacy of this policy instrument, with the view to limit the negative consequences on the value chain.

Trade Measures decisions made and implemented:

- Gov imposed provisional payments in relation to safeguard duties against the alleged increased imports of certain flat-rolled products (classified under 7210.61.20; 7210.61.30; 7225.92.25 and 7225.92.35). Implementation is effective from 27 June 2025 up to and including 13 January 2026
- Safeguard duties over a 3 year period on certain hot-rolled steel products classifiable under Chapter 72 were implemented. Implementation came into effect on 1 May 2025
- The general rate of customs duty increase on transformer cores, having a power handling capacity not exceeding 50 000 kva was implemented. Implementation came into effect on 27 June 2025.

(5) Omnibus Bill & Designation (accreditation) of an Accounting Body

Designation (accreditation) of an Accounting Body by the Minister of Trade, Industry and Competition

- ❑ The South African Institute of Taxation (SAIT) received accreditation by Minister of Trade, Industry and Competition in June 2025. The final Notice was gazetted in June 2025. SAIT views the milestone as not just a regulatory achievement; it is a meaningful step that will positively change the lives of their members, many of whom have been waiting for this recognition to broaden their professional scope and contribution.
- ❑ SAIT has applied through the Companies and Intellectual Property Commission (CIPC) to be recognised as a professional body for accounting purposes in terms of the Close Corporation Act, 69 of 1984. Section 60 of the Close Corporations Act, provides for the Minister of Trade, Industry and Competition to recognise a professional body for accounting purposes.

Omnibus Bill & List of Omnibus Bill Legislation

- ❑ Draft concept paper was developed. Submission on the list of legislation to be considered in the omnibus Bill was prepared and processed to Minister's office.
- ❑ The preliminary list of legislation has been identified that aims to ensure the achievement of the ease of doing business, promote investment and reduce red tape.
- ❑ The list was well considered and took into account the work of the entire government and in areas where there are opportunities and bottlenecks for the economy.
- ❑ A discussion document with the analysis of legislation and their status was developed. The Department is in the process of coming up with the short list out of 16 legislation that will be packaged into a Bill.



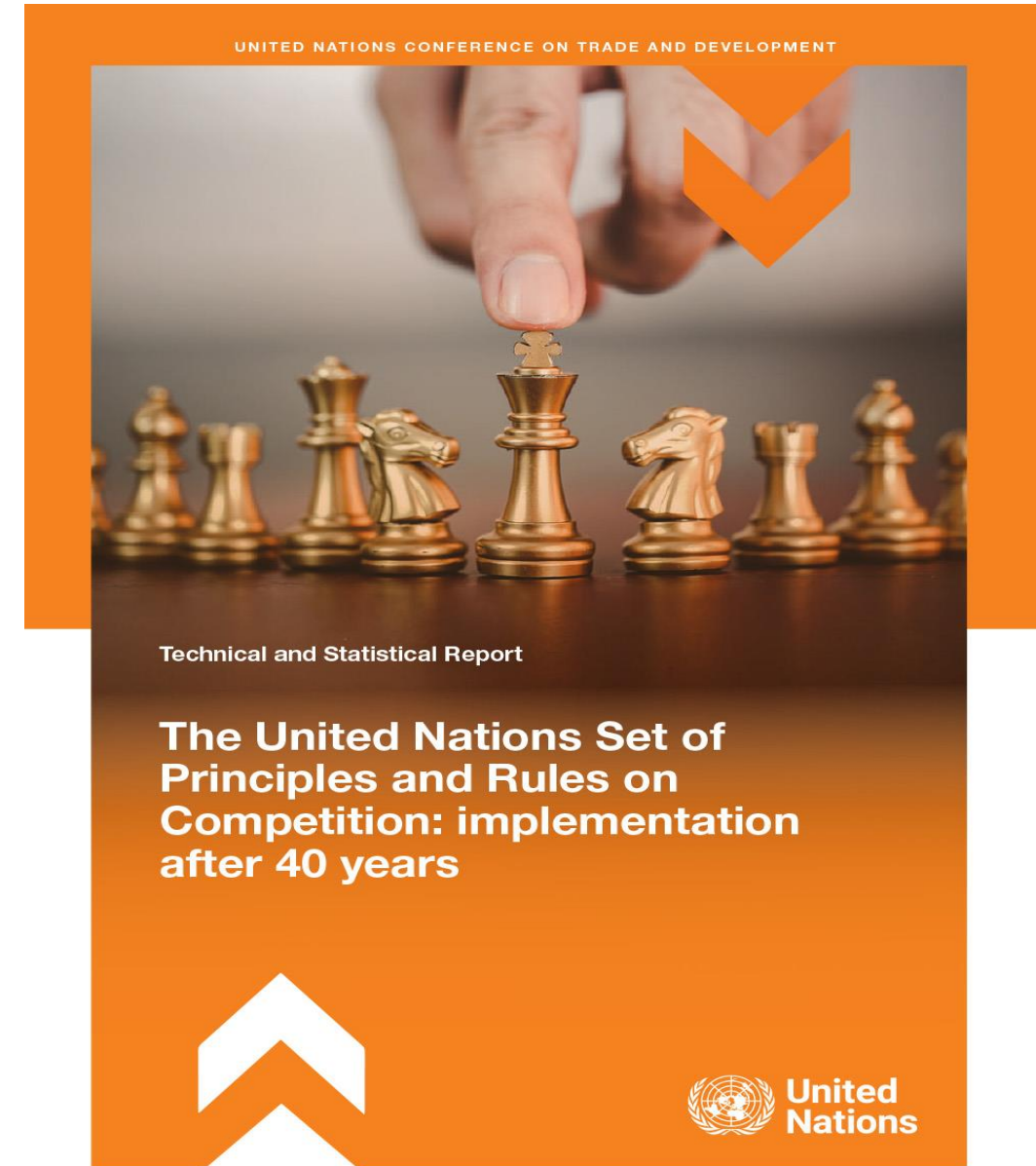
Red Tape Reduction Initiatives

- ❑ Met with the dtic entities on 04 June 2025 to discuss red tape reduction measures and improvement of turnaround times.
- ❑ Concept Paper developed and memo approved on 26 June 2025 by the DG.
- ❑ List of red tape interventions by dtic entities compiled by 30 June 2025.

(5) Consumer Product Safety

UNCTAD: CONSUMER PRODUCT SAFETY RESOLUTION

- The NCC championed the process of obtaining the Minister's approval of the consumer product safety resolution. The NCC requested **the dtic** to propose a motion by formally submitting the resolution as a proposal to start formal consultations to the United Nations Conference. The UNCTAD secretariat transmitted the draft resolution on consumer product safety for South Africa, submitted with the sponsorship of the Governments of Brazil and Spain.
- The draft resolution was intended for consideration by the Ninth United Nations Conference to Review All Aspects of the Set of Multilaterally Agreed Equitable Principles and Rules for the Control of Restrictive Business Practices. The Conference was scheduled for 7-11 July 2025.



(5) Credit, Liquor 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.

Liquor Industry:

The liquor regulations are being updated to make the industry easier to manage and more business-friendly. Key improvements include:

1. Simplifying zoning rules
2. Introducing an electronic case management system
3. Clearer trading hours
4. Easier registration renewals
5. These changes aim to reduce red tape and improve service delivery for businesses and the public.

Gambling Industry:

1. A major update to **gambling rules** focuses on helping people with gambling addiction. The amended regulations make it easier for individuals to voluntarily exclude themselves from gambling activities. A national **self-exclusion register** will now be active, allowing people to register themselves using a standard form. This is a key step in protecting vulnerable individuals.
2. The draft regulations have been shared with provincial MECs in all 9 provinces for their feedback within 30 days. After that, the final version will be discussed by the National Gambling and National Liquor Policy Councils before being officially published for public comment in the Government Gazette.

(6) Approvals & Disbursements (April to June 2025)

APPROVALS

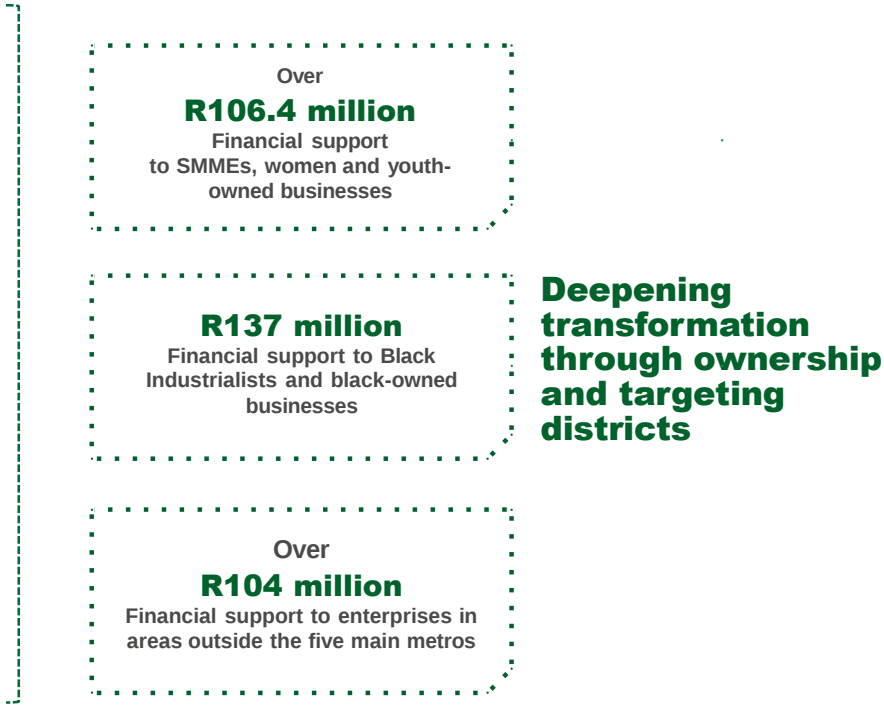
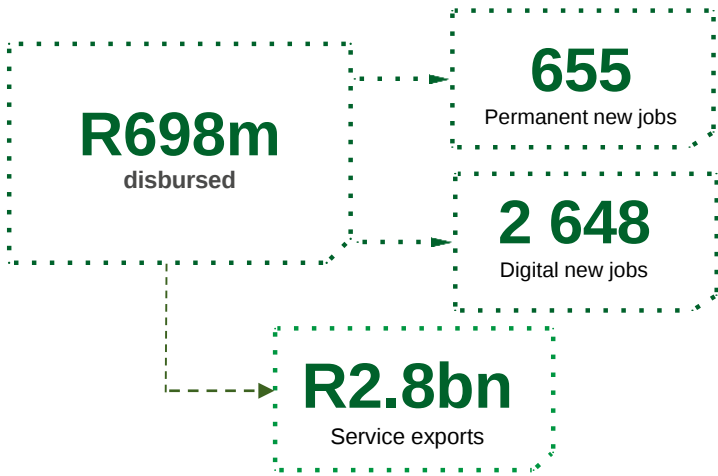


Approvals provide insight into the performance of businesses over the next two to five years and signal their potential contribution to the economy.

68 projects approved that will access funding of over R876 million. Approved projects operating in the manufacturing and infrastructure sectors projected investment of over R2 billion that will be generated over the next two to five years with the aim of improving operational efficiency in these project and hence increasing productivity and competitiveness of businesses in South Africa.

DISBURSEMENTS

Disbursements show the current impact of industrial funding

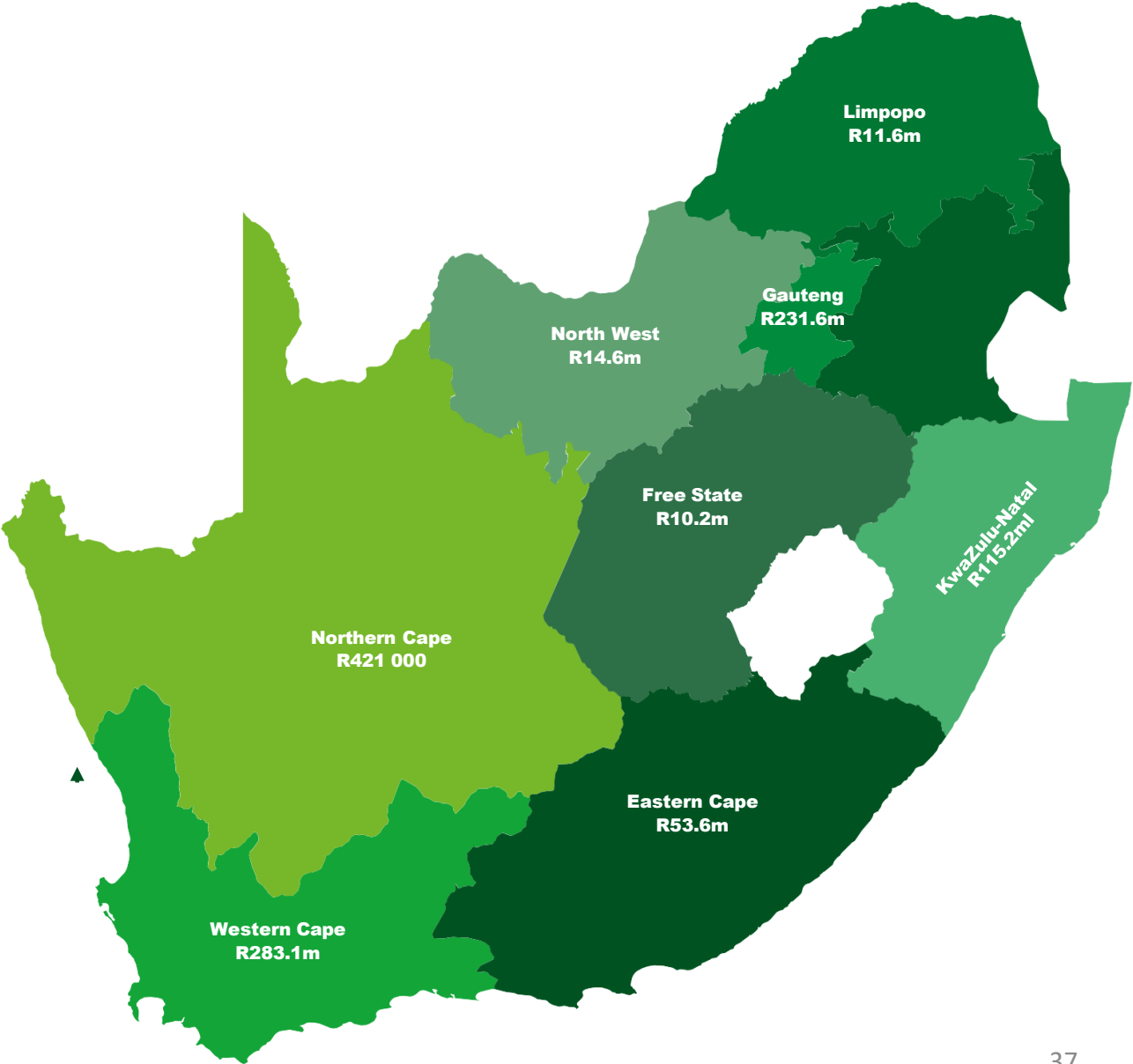


Deepening transformation through ownership and targeting districts

Automotive Manufacturers accounted for 52% of the total projected investment and includes a component manufacturers that is setting up a plant in the Dube Trade Port SEZ to manufacture various press parts that were previously imported. All raw material used to manufacture the press parts will be sourced locally. The project is also investing R2 million in skills development of workers and will be creating 171 new permanent jobs.

(6) Spatial Distribution of Disbursements

DISTRICT MUNICIPALITY OUTSIDE 5 MAIN METROS	AMOUNT DISBURSED
Amajuba District Municipality	R1.5 million
Bojanala Platinum District Municipality	R14.5 million
Cape Winelands District Municipality	R1.4 million
Capricorn District Municipality	R9 million
Dr Kenneth Kaunda district municipality	R91 000
Garden Route District Municipality	R107 000
iLembe District Municipality	R352 000
Lejweleputswa District Municipality	R10.2 million
Mopani District Municipality	R2.5 million
Nelson Mandela Bay Metropolitan Municipality	R53.6 million
Overberg District Municipality	R38 000
Sedibeng District Municipality	R981 000
uMgungundlovu District Municipality	R9.1 million
West Coast District Municipality	R108 000
ZF Mgcawu District Municipality	R421 000

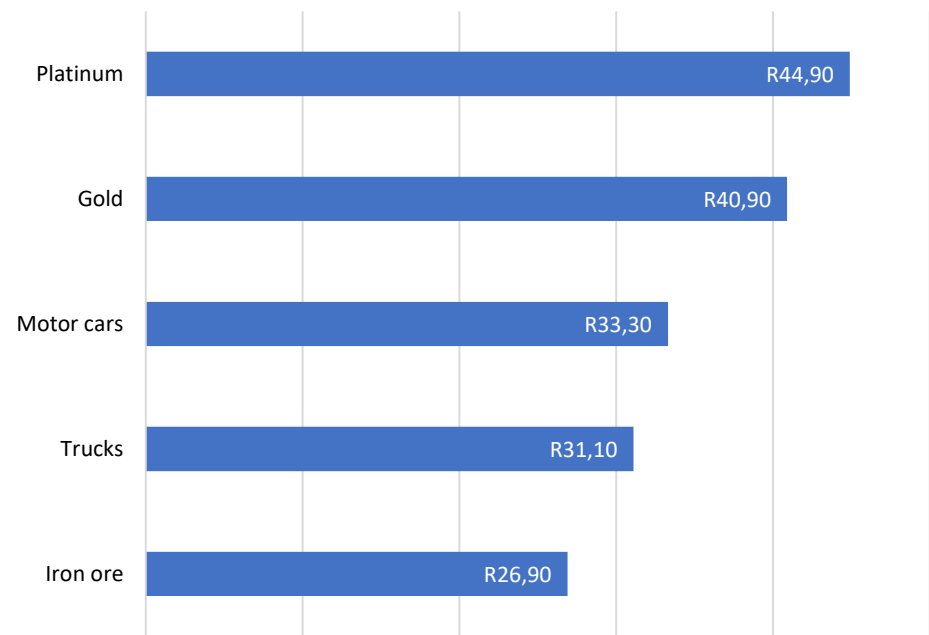


(7) Total Exports

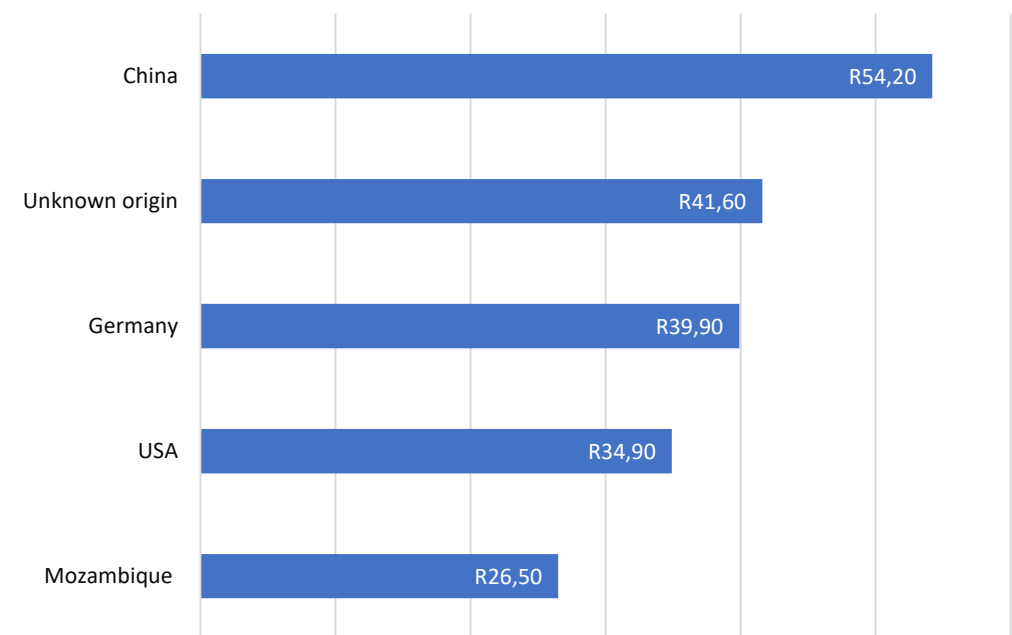
Rand Value of South African Exports to the Rest of the World in key industrial sectors including services– **R37bn (April – June 2025)**
Rand Value of South African Exports to the Rest of Africa in key industrial sectors including services – **R47bn (April – June 2025)**

Based on available data, South Africa’s exports in Q1 of 2025-26 indicates that China continues to be SA’s top destination with Germany, and the USA also major markets. Mozambique is the only African country that makes it to the top 5. In terms of products, precious metals and autos continue to be the top export goods.

Top 5 export products, April to June 2025, R Billion



Top 5 destinations, April to June 2025, R Billion



* SARS provisional data for April to June 2025 subject to updates

(7) Total Exports

Top Exported Products by Top Export Destinations, April to June 2025

	China	Germany	USA	Mozambique	Unknown origin
1	Iron ores	Automotives, cars	Platinum	Chromium ores	Gold
2	Chromium ores	Automotives, trucks	Automotives, cars	Ferro-alloys	Platinum
3	Manganese ores	Platinum	Unwrought aluminum	Iron ores	Stores for aircrafts
4	Platinum	Precious metal ores	Ferro-alloys	Electrical energy	Frozen fish
5	Unrefined copper	Centrifuges	Titanium ores	Coal; briquettes	Machinery parts

* SARS provisional data for April – June 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 4 key activities were delivered during the quarter, as follows:

- ❑ **4 x SA companies** participated in the Change Now on 24-26 April 2025 in Paris;
- ❑ **16 x SA companies** were trained for Export Marketing Plan on the 20-21 May 2025 in Sandton;
- ❑ **2 x SA companies** were supported and participated in the Hack Summit from 15-16 May 2025 in Lausanne, Switzerland;
- ❑ **7 x SA companies** participated in the London Tech week from 09-13 June 2025 in London

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

Strengthening Trade Ties with Germany through the PG Programme

- ❑ In collaboration with the German Federal Ministry of Economic Affairs and Energy (BMWi), the **dtic** Exports Branch undertook 2nd Steering Committee Meeting held in Berlin to review progress on the Partnering in Business with Germany (PG) programme.
- ❑ This initiative aims to strengthen trade and investment linkages between South African and German SMEs. During the quarter **19 x SA companies** received training and mentorship support in Germany.

❑ The breakdown of the companies comprised of:

- ❑ **19 x SMMEs entities**
- ❑ **18 x Black owned entities**
- ❑ **5 x Women-owned entities**
- ❑ **3 x Youth-owned entities**

(7) Export Promotion– Implementation of the Butterfly Approach

Key activities undertaken during the quarter are as follows:

- ❑ Facilitated the engagements of 250 x SA companies in the **Inaugural Massmart Africa Growth Summit** to access markets in SADC and beyond;
- ❑ 7 x SA companies participated in the **Benin Investment Forum** from 8 – 9 May, 2025;
- ❑ Delivered engagements between Maya Hatcheries and Global Leaders Corporation based on a request for 500 000 fertilised eggs resulting in a letter of intent;
- ❑ 17 x SA companies financially benefitted from the Export Marketing and Investment Assistance (EMIA) Group Scheme to participate in China - Africa Economic and Trade Expo (CAETE 2025), from 12-15 June 2025, in Changsha China;



Increased Export

Agreements signed by **Quimera Logistics** – An Inward Buying Mission (IBM) with Quimera was facilitated in April 2025. New developments are as follows:

- Quimera has signed 2 agreements with COEGA SEZ and Afrilog/Multilog.
- The COEGA SEZ was proposed to Quimera by the dtic SEZ unit during the April 2025 IBM and meetings were organised with COEGA SEZ during the April IBM. Coega SEZ will partner Quimera to implement the Industrial Park and Logistics platform

(8) Transformation and Inclusion Initiatives

Transformation Fund

- ❑ Hosted at least **26 Transformation Fund Stakeholder Engagement sessions**, as part of the public comments and submissions process
- ❑ The key highlight was a breakfast session held on 5 May 2025 which was addressed by the Deputy President
- ❑ Written submissions received from individuals, civil society organisations, business associations and labour unions
- ❑ The Transformation Fund's digital communication initiatives reached a total of 123,047 individuals, accompanied by the generation of 140 user-generated comments across various platforms
- ❑ Updated version of the Concept document submitted to the Minister. Processes of the establishment of the Special Purpose Vehicle (SPV will begin to oversee the raising of the seed capital for the Transformation Fund



**Transformation Fund Stakeholder Engagement breakfast
Session 5 May 2025**

(8) Transformation and Inclusion Initiatives



Minister Parks Tau and the Minister of Small Business Development, Ms Stella Tembisa Ndabeni launched the R500 million Spaza Shop Support Fund at the Eyethu Shopping Centre, in Soweto, on 8 April 2025. The aim of the fund is to support the South African-owned spaza shops that are based in townships and rural areas, to increase their participation in the retail trade sector. The National Empowerment Fund (NEF) and the Small Enterprise Development Finance Agency (SEDFA) jointly administer the fund.

(8) Transformation and Inclusion Initiative

B-BBEE/ EEIP

- **B-BBEE Policy Review**
- **Roadmap for the review of the B-BBEE Policy (inclusive of the Strategy, Act and Code)** – A roadmap for the review of the B-BBEE policy was presented to the Minister. The review will be done in two phases – short term which is at the discretion of the Minister, and long term review which is the process that requires Parliament. This process will be preceded by stakeholder consultations within government and social partners. The Roadmap as presented to the Minister was intended to communicate the journey to be undertaken in the process of developing the B-BBEE Policy.

Social Employment Fund (SEF)

- The **Social Employment Fund** was allocated an amount of **R1.3 billion** for the current financial year, and the fourth round of funding is yet to commence. SEF is seeking further funding for the next three financial years, and a proposal was submitted to National Treasury in this regard.

(8) Competition Matters

- **68 Merger notifications** were received and the Minister was advised to participate in 3 mergers (4%) based on public interest considerations in the following sectors: Clothing, footwear and accessories, Mining and quarrying, and Manufacturing .
- **3 595 additional workers with shares** in the following sectors: Engineering Services, Forestry/Saw Mill for Timber, as well as in the Security Services.
- **R556 million commitments** (R534 million for procurement), and R752 million (R112 million for procurement) disbursed towards SMMEs, women-owned enterprises, youth-owned enterprises and enterprises owned by people with disability.
- **219 permanent jobs were created in Mergers and EEIP companies** in the following sectors: Retail, Agriculture and agro-processing, Technology, Automotive, and Information Technology.
- Gazetting of the extension period for the **completion of the Digital Media Platform Market Inquiry** to 31 August 2025 in order to address concentration through the implementation of Market Inquiries.
- The Minister **approved the draft block exemption for Ports and Rail in a government notice**, inviting public comments. The purpose of these Regulations is to:
 - reduce costs, improve services and minimise losses caused by operational inefficiencies and infrastructure capacity shortages; and
 - contribute to measures aimed at resolving the challenges in the South African rail and ports industry.

(9) Economic Research

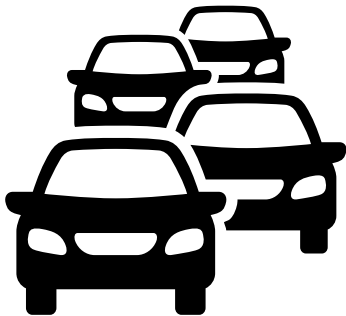


Coordinated and compiled
ESIEID Cluster quarterly
progress report on the
implementation of the MTDP



**Quarterly data analysis
reports on Africa**
South Africa’s manufactured
exports to the African
continent declined by 12.33%
in Q1:2025 compared with
Q4, 2024 (q-o-q), but
expanded by 1% compared
with Q1, 2024 (y-o-y)

**Bilateral trade reports (2024):
South Africa – Côte d'Ivoire – Tanzania**



Automobiles
dominate South
Africa’s exports to
the two countries



Gold exports
dominate the two
countries' exports
to South Africa



TURNOVER

**Black Industrialist
Survey:** 25% reported a
turnover of more than
R20 million,
improvement from 21%
in Q2 2024

Financial Performance Overview



the dtic

Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

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Financial Performance Overview – 30 June 2025

1 April 2025



30 June 2025



R 11 billion

Original Budget



R 2.5 billion

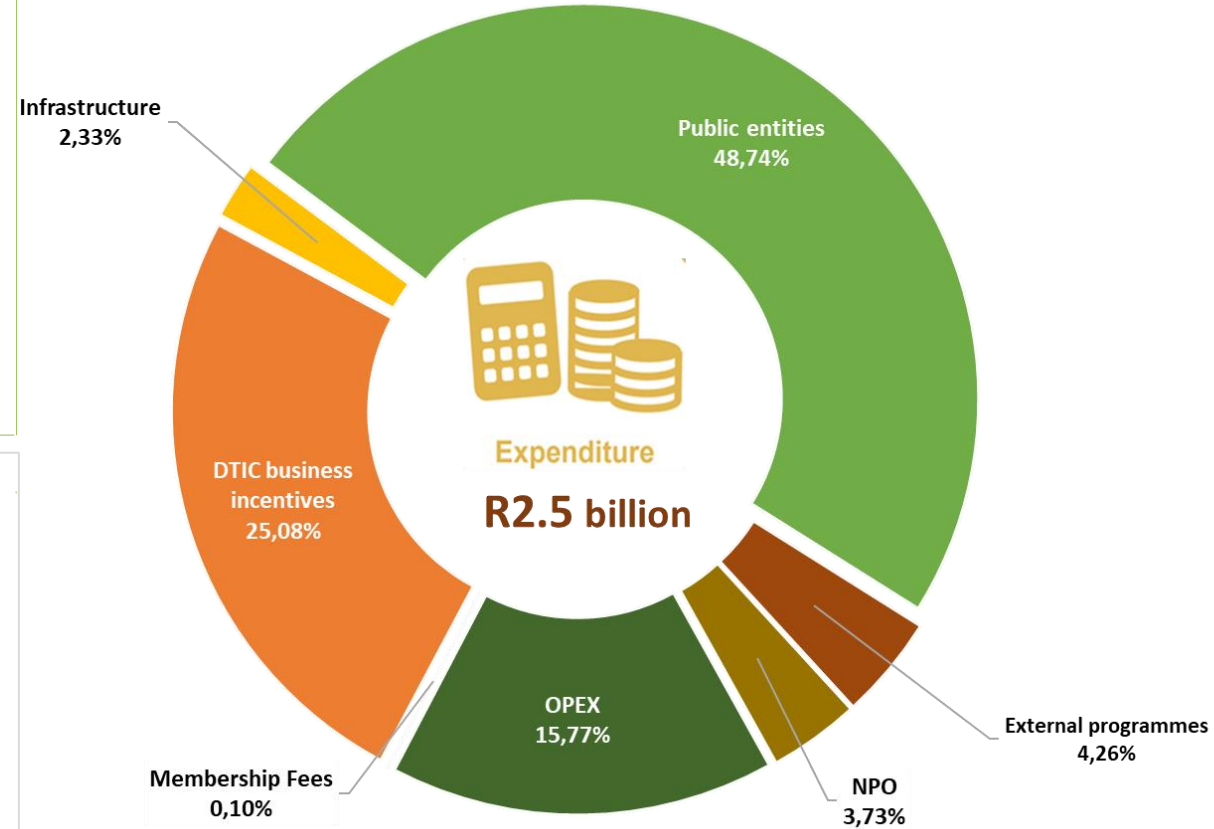
Spent as at 30 June 2025

Spent as % of budget = 23%

R2.5 billion was disbursed as follows:

- **R1.2 billion** or **48.74%** - Public entities
- **R698.6 million** or **27.41%** - Beneficiaries across various incentive programmes (business and infrastructure)
- **R401.9 million** or **15.77%** - Operational costs
- **R108.6 million** or **4.26%** - External programmes at the IDC and CSIR
- **R95 million** or **3.73%** - Non profit organisations
- **R2.4 million** or **0.10%** - International organisations of which South Africa is a member

Spending categories as % of total expenditure



Financial Performance Per Programme & Economic Classification

	Budget 2025/26	Budget Available	% Budget Available	YTD Projections as at 30 June 2025 R'000	Actual expenditure 30 June 2025 R'000	Variance R'000	% Variance
Description	R'000	R'000					
Programme 1: Administration	972 281	767 897	79,0%	222 984	204 384	18 600	8,3%
Programme 2: Trade	261 682	124 578	47,6%	135 590	137 104	(1 514)	-1,1%
Programme 3:Investment and Spatial Industrial Development	181 909	150 323	82,6%	38 471	31 586	6 885	17,9%
Programme 4: Sectors	1 674 105	1 032 186	61,7%	640 425	641 919	(1 494)	-0,2%
Programme 5: Regulation	363 261	180 697	49,7%	212 672	182 564	30 108	14,2%
Programme 6: Incentives	5 205 216	4 467 694	85,8%	694 037	737 522	(43 485)	-6,3%
Programme 7: Export	390 274	190 521	48,8%	214 936	199 753	15 183	7,1%
Programme 8: Transformation and Competition	1 958 434	1 556 523	79,5%	959 579	401 911	557 668	58,1%
Programme 9: Research	64 587	52 319	81,0%	10 671	12 268	(1 597)	-15,0%
Total	11 071 749	8 522 739	77,0%	3 129 365	2 549 010	580 355	18,5%
Economic classification							
Current payments	1 942 615	1 542 669	79,4%	433 853	399 946	33 907	7,8%
Compensation of employees	1 138 311	891 150	78,3%	264 284	247 161	17 123	6,5%
Goods and services	804 304	651 519	81,0%	169 569	152 785	16 784	9,9%
Transfers and subsidies	9 110 201	6 961 253	76,4%	2 687 149	2 148 948	538 201	20,0%
Incentive payments	5 020 778	4 322 131	86,1%	648 311	698 647	(50 336)	-7,8%
Department entities	1 752 758	510 378	29,1%	1 273 332	1 242 380	30 952	2,4%
External Programmes	2 117 108	2 008 503	94,9%	667 421	108 606	558 816	83,7%
Non profit organisations (Partnerships with business associations, NEDLAC)	170 705	75 643	44,3%	95 476	95 062	414	0,4%
Membership fees (International organisations)	47 753	45 327	94,9%	2 447	2 426	21	0,9%
Households	1 099	(728)	-66,2%	162	1 827	(1 665)	-1027,6%
Payments for capital assets	18 933	18 817	99,4%	8 363	116	8 247	98,6%
Total	11 071 749	8 522 739	77,0%	3 129 365	2 549 010	580 355	18,5%

THANK YOU

