FROM THE DESK OF THE CEO (5/26)
Boitshoko Ntshabele, 30 January 2026

"Spend each day trying to be a little wiser than when you were when you woke up." *– Charlie Munger*

SOUTH AFRICA AND BRICS TRADE POSSIBILITIES

Looking at the headlines these past few weeks, one noticed how countries everywhere — even the developed ones — are moving to secure new trade deals. India signing a trade pact with the EU, Canada with China, the UK Prime Minister flying this week to Beijing in search of opportunities. The message is clear: everyone is seeking to diversify, because the global economy is in a state of turbulence. No one can afford to stand still and not shore up protection for their economy.

It is interesting to see that some of these deals are concluded with BRICS countries — SA's partners. Yet while others are deepening ties, South Africa's trade within BRICS has not fared that well. In fact, it is going backwards. We joined in 2010 with a trade deficit of R66 billion. In 2024, that gap according to reports, has worsened to R250 billion, a figure that should concern all of us.

I remember hearing last year about a possible partial trade pact with India. It sounded promising and was decidedly partial to protect our weaker sectors like textiles, while still opening doors in other areas. But it appears progress has stalled. And meanwhile, our partners are moving ahead, broadening their market access whilst there is no significant progress on our side. This last season, the CGA's foray into promoting SA citrus in India has shown some promising results and that, with more effort, a lot can be achieved.

Shouldn't BRICS countries be prioritising each other? Some pragmatism is needed as the bloc cannot just be about solidarity and cooperation; trade surely must also be at the heart of it. Wandile Sihlobo made a call this week for a BRICS Plus trade agreement as they begin work under India's 2026 presidency. That is the kind of thinking we need in uncertain times. Talk of friendliness and geopolitical categories will not take us further, but trade and the resultant job creation could. It will make a significant difference for agriculture as currently our products enter markets in India and China subjected to tariffs, making us uncompetitive, while others enter tariff free.

South Africa's economy has shown some green shoots recently, but honestly, our unemployment crisis remains a serious emergency. We cannot afford to treat BRICS plus membership as a diplomatic nice-to-have. We need to push, with urgency, for a BRICS trade pact that actually delivers for South Africans.

That said, it is still completely possible for South Africa to — like other countries — avoid getting caught up in a geopolitical game of one-block-versus-another. The whole world loves our high-quality citrus. And we want to supply all the markets we possibly can.

CGA ROADSHOWS

Week 16-19 February sees Boitshoko's team heading to Burgersfort, Hoedspruit, Letsitele, and the Limpopo River regions, while Paul's team will head out to Groblersdal, Nelspruit, and the Onderberg regions.

During the week of 3-5 March Boitshoko and his team will visit the Boland and Western Cape, and Northern Cape regions, while Paul and his team will visit the Patensie, Sundays River Valley, and Eastern Cape Midlands regions. It will be KZN's turn on the 11th of March.

For further details on venues, times, and the programme, and to RSVP, please contact tanya@cga.co.za.