SADC Wheat Chain: The Roadmap To Regional Self-Sufficiency

SOUTHERN AFRICAN DEVELOPMENT COMMUNITY
SADC
TOWARDS A COMMON FUTURE

www.sadc.int

THE 5Ws AND 1H OF SADC WHEAT

WHAT
A Vital but Deficit Staple

70% Reliance on Imports

Critical staple, especially in urban areas.

WHO
The Dominance of Large-Scale Actors

82% Production led by South Africa (83% regional total) & Zambia. Milling controlled by 2–8 large firms per country.

WHERE
Production and Consumption Hubs

Producers: South Africa & Zambia

Consumers: South Africa (50% domand), Tanzania, Angola, Muzambique.

WHEN
Recent Market Shifts (2021–2022)

After years of stalled productivity, global price surges stimulated regional planting & value chain development.

WHY
Enhancing Food Security and Trade

$947.5 Million

Essential to reduce annual import bill and chield the region from global price shocks.

HOW
Mechanised Production and Processing

Seed/Fertiliser > Mechanised Farms > Large Scale Roller Mills > Industrial Bakers & Retailers.

REGIONAL PERFORMANCE BY THE NUMBERS

REGIONAL PRODUCTION

2.3 MILLION MT

▲ Modest 0.5% Annual Growth

South Africa contributes **1.82 million MT**

REGIONAL CONSUMPTION

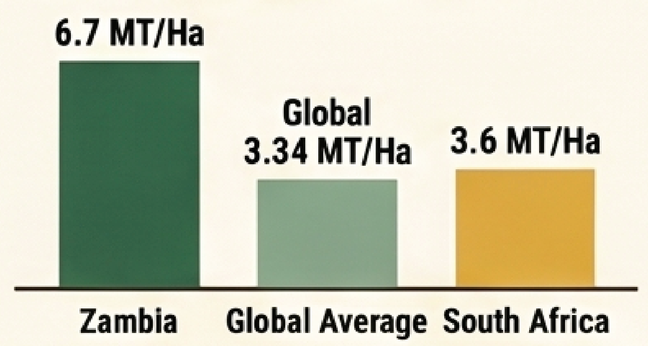
7.4 MILLION MT

▲ Growing at 1.4% per year

91% IMPORT RELIANCE

6 MILLION MT Imported from RoW **$968 MILLION** in average yearly spending

SADC YIELDS VS. GLOBAL AVERAGES



Other Member States lag significantly.

3% POST-HARVEST LOSSES

3%

Low due to high mechanisation and well-maintained storage.

STRATEGIC BOTTLENECKS

INPUT COST VOLATILITY
Fortiliser prices in South Africa surged by 85% in 2022. 80%+ reliance on imported fcrtilisers.

INFRASTRUCTURAL DEFICITS
Absence of integrated regional rail forces reliance on espensive rood transport, driving up final prices.

CLIMATIC CONSTRAINTS
Historical varieties need cold; increasing beet stress is a major threat to traditional production.

NON-TARIFF MEASURES (NTMs)
Regulatory inefficiencies and lack of policy coherance across borders impeds free grain flow.

DETAILED RECOMMENDATIONS

ADOPT HEAT-TOLERANT VARIETIES
Invest in and distribute newer variaties that cield well with lewer card temperature requirements for warmer regions.

INVEST IN REGIONAL PROCESSING NODES
Establish small-scale facilities in rural areas to reduce transposl costs and increase bread/flour availability.

PRIORITISE RAIL INFRASTRUCTURE
Develop and coordinate an integrated regional tall network for chceper bulk movement.

HARMONISE REGIONAL TRADE POLICY
Ensure full implementation of SADC Free Trade Agreement and reduce NTMs to encourage investment.

SADE FTA

EXPAND SMALL-SCALE FARMER SUPPORT
Follow "Zimbabwe Model": Government schenice for inpursimechanisstion led to 35% production from smallhulders.