



TRADE & INDUSTRIAL POLICY STRATEGIES



Tracking quarterly trends and analysing foreign direct investment, imports and exports

TIPS IMPORT TRACKER

THIRD QUARTER 2021

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TIPS TRACKERS

[TIPS Export Tracker](#) provides updates on export trends, and identifies sectors and products that are performing well and those that are lagging.

[TIPS Import Tracker](#) provides an overview of import patterns and looks at the causes of surges in imports, and their likely impact on industry.

[TIPS FDI Tracker](#) monitors inward foreign direct investment projects. It reports on new FDI projects, analyses these, and adds them to an ongoing list of investment projects.

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IMPORT AND EXPORT TRENDS

Trade context

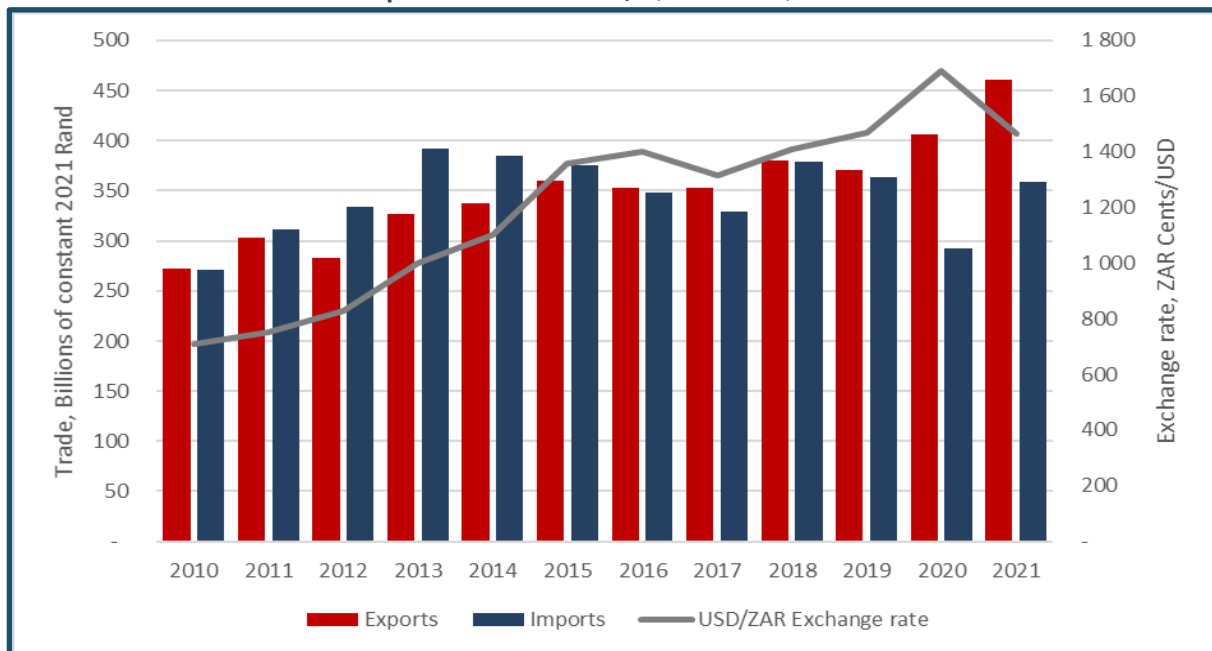
South Africa continued to maintain a strong trade balance in the third quarter of 2021, with a surplus of R102 billion, down 11% from the third quarter of 2020. High mineral prices continue to be the main driver for the high surplus, although these prices are beginning to fall. In addition, exports to major trade partners such as the United States (US), Japan and the United Kingdom (UK) improved in the year to the third quarter of 2021, rising by 20%, 90% and 52% respectively.

Graph 1 shows the trade balance for the period between the third quarters of 2010 and 2021. As the graph shows, exports reached the highest third quarter level in 2021 at R460 billion, from a previous high of R406 billion in the third quarter of 2020.

Imports from the top five import sources grew by a combined R38.6 billion (or 34% year-on-year), with imports from China increasing by about 12% – the lowest increase among the five countries. However, this lower increase is due to China being the first country to contend with the COVID-19 virus, with most of the impact felt in the first quarter. Further, imports from the US, India and Saudi Arabia all more than doubled, while imports from Germany grew by about 41%. In all, the top five countries accounted for 46% total imports.

Diesel surpassed crude oil to become the top import item in the second quarter of 2021. Total diesel imports amounted to R18.4 billion (from R6.1 billion in the second quarter of 2020), while crude oil imports amounted to R14.5 billion (down from R16.7 billion in the second quarter of 2020). Overall, the value of the top five import items grew, from R35 billion in the second quarter of 2020 to R62.5 billion for the quarter under review.

Graph 1: Trade balance, Q3 2010 – Q3 2021



Source: Calculated from South African Reserve Bank (SARS) Trade Statistics and South African Reserve Bank (SARB).

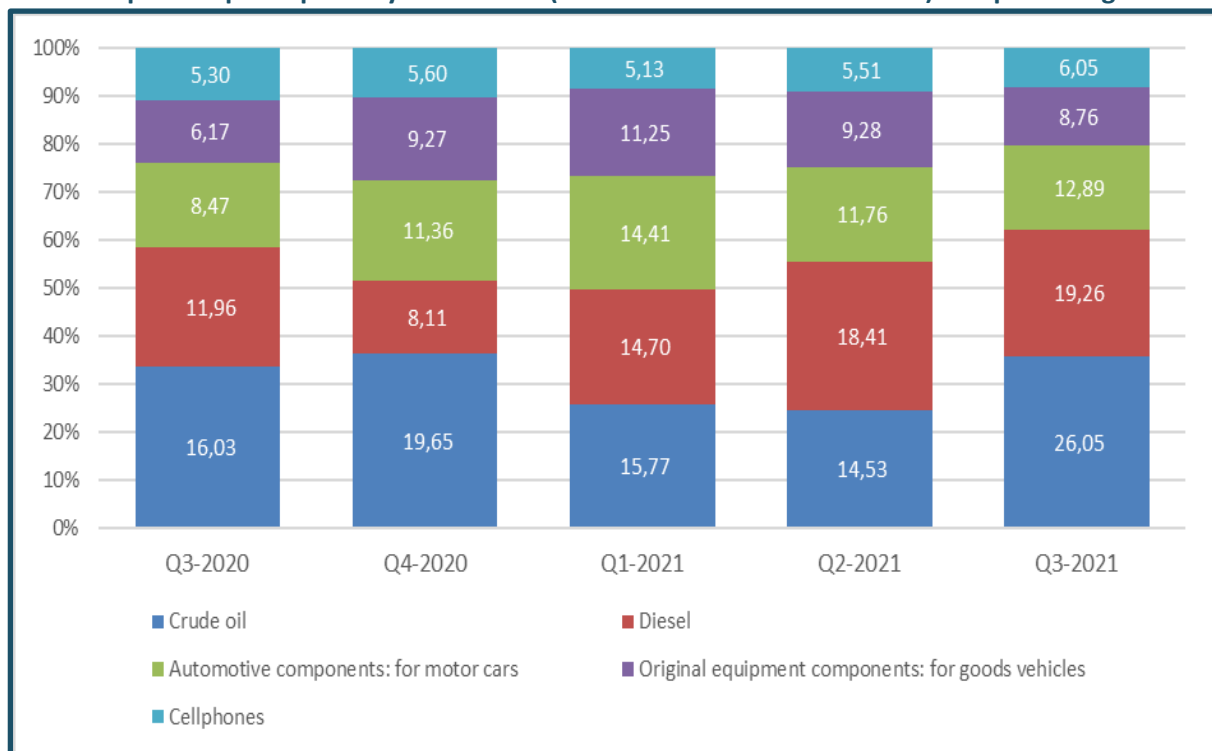
The value of the top five export products increased by 35% (or R33.1 billion) in the year to the third quarter of 2021, with unwrought rhodium showing the highest growth at 143% (or R20.4 billion). Over the same period, gold exports declined by 23% (or R7.7 billion).

Exports to the top five export destinations for South African exports increased by about 26% (or R40.5 billion) in the year to the third quarter of 2021. At R16.9 billion (or 90%) higher than in the third quarter of 2020, exports to Japan show the highest growth, followed by exports to the UK, with R10.3 billion (or 52%) growth.

China, South Africa’s largest single export destination, accounted for about 11% of total third quarter exports, and 26% of the top five export destinations, with the lowest year-on-year growth. Overall, in the year to the third quarter of 2021, exports to China grew by 5% (or R2.4 billion).

The composition of the top five imports changed slightly in the third quarter of 2021, with cellphones replacing petrol as the fifth highest import product (see Graph 2). Crude oil imports, which saw major declines at the start of the pandemic, are beginning to recover, with third quarter imports growing to R26.1 billion. Notably, imports of automotive components for motor cars, which have performed over the past almost two years, declined in the third quarter of 2021. These imports declined by about 6% to R8.8 billion from R9.3 billion in the second quarter of 2021. Nevertheless, imports of this product remained about 42% higher compared to the third quarter of 2020.

Graph 2: Top 5 imports by Rand value (billions of constant 2021 Rand) and percentage



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021.

Continental trade

Imports from the continent increased by about R795.2 million (or 2%) between the third quarter of 2013 and the third quarter of 2021. Year-on-year, imports increased by about R10.6 billion (or 36%) to R39.9 billion (see Graph 3), signalling recovery from the impact of the COVID-19 pandemic.

Crude oil, gold, mixtures of odoriferous substances and mixtures (including alcoholic solutions), non-industrial diamonds and electrical energy were the top five imports from the continent, amounting to about R22 billion. Non-agglomerated iron ores and concentrates, electrical energy, chromium ores and concentrates, light oil and preparations, and bituminous coal made up the top five exports from South Africa to the rest of the continent, and amounted to about R16.1 billion.

Graph 3: Continental trade, Q2 2013 – Q2 2021, billions of constant 2021 Rand

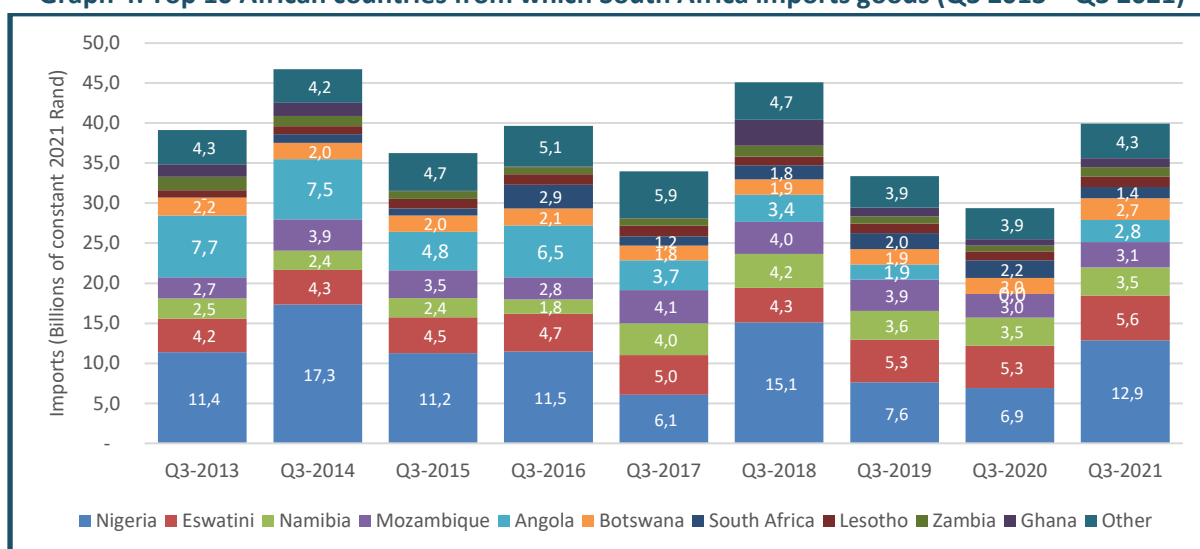


Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021.

Nigeria remains the largest source of imports from the continent, accounting for about 32% of total imports from the rest of the continent, followed by eSwatini with a further 14%, Namibia at 9%, along with Mozambique and Angola at 8% and 7% respectively. The bulk of imports from Nigeria and Angola were crude oil, while the bulk of imports from Mozambique were electrical energy, closely followed by natural gas. Further, the bulk of imports from Namibia were gold, while the bulk of imports from eSwatini were mixtures of odoriferous substances and mixtures.¹

Overall, the top 10 import sources within the continent accounted for about 89% (about R35.6 billion) of total imports from the continent in the third quarter of 2021, compared to 87% (about R25.5 billion) in the third of 2020. These imports include reimports by South Africa, which amounted to R2.2 billion in the third quarter of 2020, and R1.4 billion in the third quarter of 2021. The majority of the reimports were products of the printing industry – including books, newspapers and pictures.

Graph 4: Top 10 African countries from which South Africa imports goods (Q3 2013 – Q3 2021)



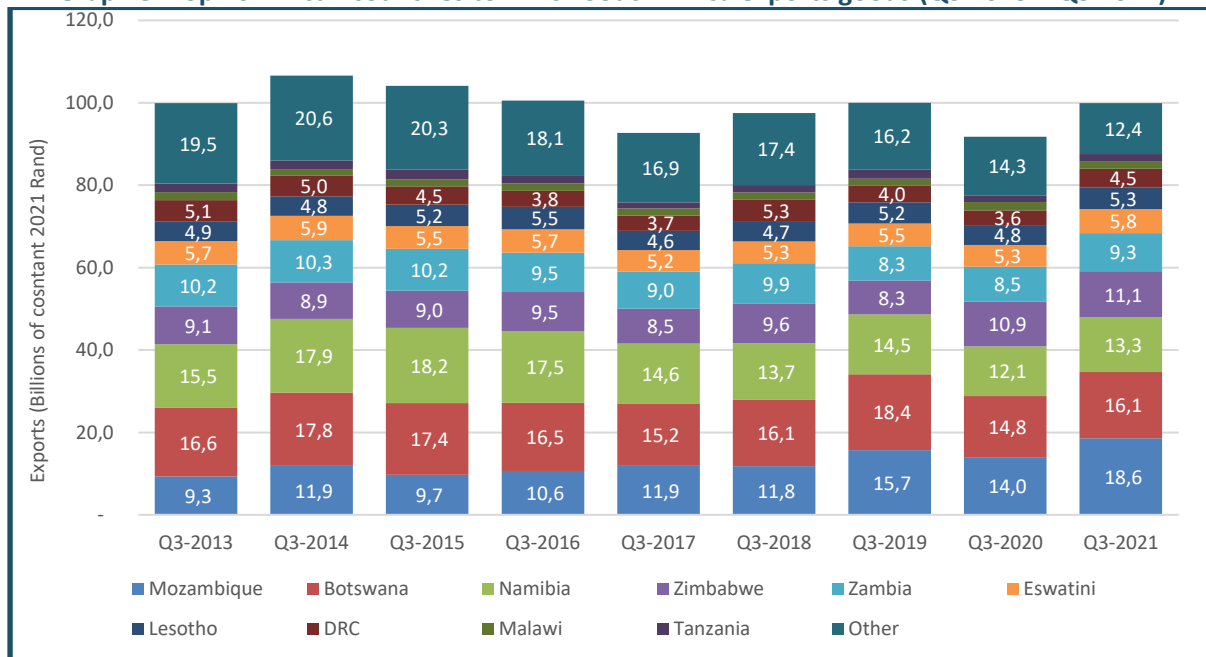
Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021.

¹ These are raw materials like essential oils used in various industries, including food and beverages, cosmetics and personal care

With the exception of a few quarters, including the third quarter of 2014 and the third quarter of 2017, exports to the rest of the continent remained essentially unchanged in real terms between the third quarter of 2013 and the third quarter of 2021. As at the second quarter of 2021, non-agglomerated iron ores and concentrates exports – the bulk of which went to Mozambique, likely for export via the Port of Maputo – surpassed electrical energy as the top export product to the rest of the continent (at HS8 level). About R5.9 billion worth of iron ores and concentrates were exported to the rest of the continent in the third quarter of 2021.

Graph 5 shows the top 10 countries in the rest of Africa to which South Africa exports its goods. At about R18.6 billion, exports to Mozambique have doubled since the third quarter of 2013, with the country now being the top destination for South African exports.² Due to the COVID-19 pandemic, exports to Mozambique fell by about 11% between the third quarter of 2019 and the third quarter of 2020, but have recovered, growing by about 33% between the third quarter of 2020 and the third quarter of 2021. Other African countries to which South Africa exported goods are Botswana (R16.1 billion), Namibia (R13.3 billion), Zimbabwe (R11.1 billion) as well as Zambia (9.3 billion), among others. Exports to these five countries amounted to R68.4 billion, and accounted for about 68% of total exports to the rest of the continent.

Graph 5: Top 10 African countries to which South Africa exports goods (Q3 2013 – Q3 2021)



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021.

Major imports

The Top 100 imports by Rand value amounted to R165.8 billion in the third quarter of 2021, up from R147.5 billion in the second quarter. Annexure 1 shows the Top 100 imports by Rand value for the third quarter. These imports can be classified into at least seven broad categories: 1) petroleum and other liquid fuels; 2) information and communications technology equipment; 3) food and beverages; 4) production metals; 5) automotive (including automotive components); 6) medical equipment; 7) aircraft and aircraft components.

² However, this changes if the ores and concentrates exports to Mozambique are in fact for export via the port of Maputo. This would make Botswana the top export destination within the continent.

Various products show significant change in rank in the year to the third quarter of 2021 (see Annexure 1). These include fully or partly automatic machines for resistant welding of metals, which moved up more than 1700 spots to 53rd in the Top 100, with imports amounting to R603.2 million; aeroplanes and other powered aircraft, which moved more than 3 000 spots to 100th with imports amounting to R362.7 million; as well as forging or die-stamping machines, which moved almost 600 spots to 88th, with imports amounting to R408.8 million.

Import surges

2 shows the list of the Top 50 import products by quantity for the third quarter of 2021. In this annexure, based on a long-term view, import trends are classified into different categories such as not significant, ongoing monitoring, data errors, and increases selected for analysis. From the 50 products, four were selected for analysis, while another three were part of ongoing monitoring. In all, 12 products show a decline in imported quantities (see Table 1), while seven were flagged for possible data errors (see Table 3).

Of the 12 products with quantity declines in the third quarter of 2021, two show growth in the Rand value. The value of natural gas imports, whose quantity declined by 6% between the third quarters of 2020 and 2021, increased by about 13%. However, the decline in quantities is likely the correction of potential data error reported in the [third quarter](#) of 2020. Further, imports of mechanically deboned chicken declined by about 12% while the value increased by about 31% (see Table 1).

Table 1: Decline in imports between Q3 2020 and Q3 2021

HS CODE	PRODUCT DESCRIPTION	REAL DECLINE, QUANTITY	UNIT	PERCENT DECLINE, QUANTITY	PERCENT GROWTH/ DECLINE, VALUE
27111100	Natural gas, liquefied	- 49 663 021	Kilograms	-6%	13%
25232900	Portland cement	- 29 654 687	Kilograms	-9%	-26%
10063000	Semi-milled or wholly milled rice, whether or not polished or glazed	- 48 009 599	Kilograms	-15%	-29%
01069000	Live animals	- 107 745 396 587	Units	-99.8%	-50%
31042000	Potassium chloride for use as fertiliser	- 71 442 299	Kilograms	-32%	-21%
28362000	Disodium carbonate	- 51 982 479	Kilograms	-37%	-49%
27101207	Light oils and preparations: Aviation kerosene	- 48 461 603	Litres	-36%	-6%
85235210	Cards incorporating one or more electronic integrated circuits "smart cards" : Digital	- 3 852 944	Units	-5%	-3%
23040000	Oilcake and other solid residues from the extraction of soya-bean oil	- 14 703 107	Kilograms	-17%	-11%
27011100	Anthracite, whether or not pulverised, non-agglomerated	- 36 900 921	Kilograms	-42%	-46%
28331100	Disodium sulphate	- 6 532 661	Kilograms	-11%	-30%
02071210	Frozen fowls of the species Gallus domesticus, not cut in pieces: Mechanically deboned meat	- 5 660 079	Kilograms	-12%	31%

The next section provides explanations for the surges in Annexure 2.

Explanation of import surges

Finding 1: Ongoing monitoring of previously identified surges

Table 2 shows products that have previously been selected for analysis, and are now monitored for changes in the trend.

Table 2: Ongoing monitoring of import surges of previously identified surges

HS CODE	PRODUCT DESCRIPTION	STATUS OF SURGE	EXPLANATION
25231000	Cement clinkers	Inconsistent	Imports rose to 143.8 million kilograms from 109.6 million kilograms in the second quarter. Quantities imported vary based on whether there are imports from Saudi Arabia, which is a sporadic exporter of cement clinkers to South Africa.
27101215	Light oils and preparations: Illuminating kerosene	Ongoing	Imports increased to 81.9 million litres in the third quarter of 2021 from 15.2 million kilograms in the third quarter of 2020 when South Africa began importing significant quantities of this product for the first time since 2017.
27111200	Propane, liquefied	Ongoing	Imports amounted to 52.9 million kilograms in the third quarter of 2021, from 21.3 million kilograms in the third quarter of 2020.

Finding 2: Light oils and preparations: Residual fuel oils

Residual fuel oils (HS 27101235) are fuel oils that remain after the removal of valuable distillates (such as gasoline) from petroleum, and are especially used in industry. Residual fuel oils are one of the lowest-value petroleum products from a refinery. They are essentially a by-product of producing the light products that are the primary focus of a refinery. The primary end use for residual fuel oil is as a fuel in simple furnaces such as power plants and industrial boilers. They are also the primary fuel used on ocean-going ships, where it is called bunker fuel.³

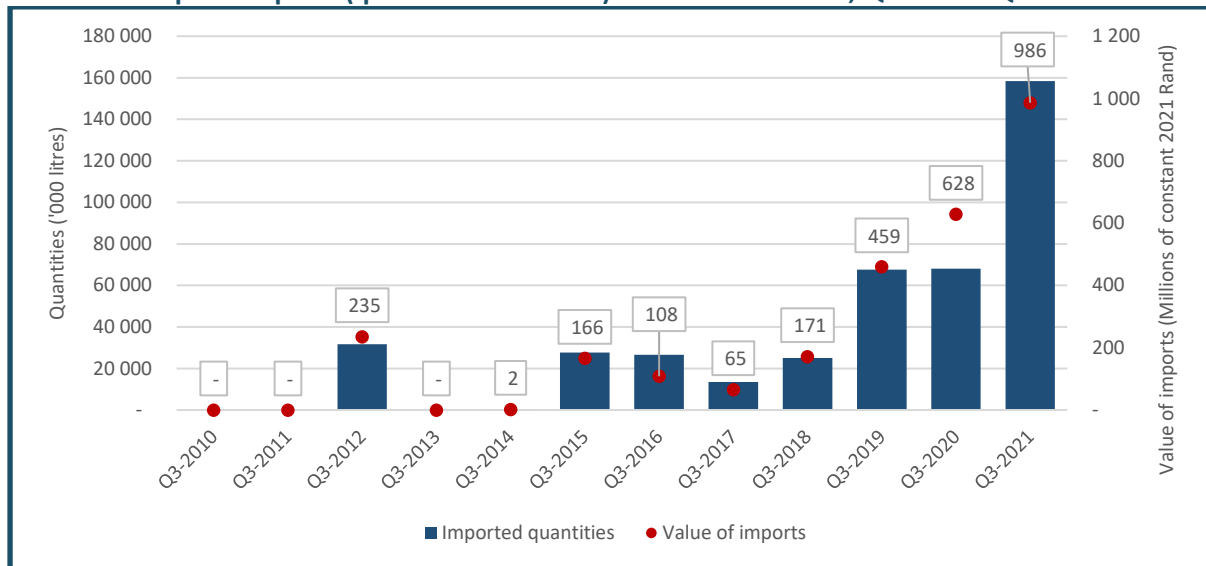
In the third quarter of 2021, residual fuel oils joined a list of various products under HS 27 (mineral fuels, mineral oils and products of their distillation; bituminous substances; and mineral waxes) that show significant growth in imports. Since the fourth quarter of 2020, monitoring through the Import Tracker identified surges in imports of products such as illuminating kerosene (HS27101226); liquefied propane (HS 27111200); illuminating kerosene (HS 27101215); and liquefied butane (HS 27111390), which more than doubled in the first quarter of 2021.

South Africa inconsistently imports residual fuel oils. As Graph 6 shows, imports fluctuated in the period under review, reaching a high of 158.4 million litres in the third quarter of 2021, from 68.1 million litres in the third quarter of 2020. Roughly 49% of imported third quarter quantities came from Singapore, from which South Africa sporadically imports this product. Another 20% of the

³ <https://www.mckinseyenergyinsights.com/resources/refinery-reference-desk/residual-fuel-oil/>

imports came from Malaysia, with a further 12% from the US. In all, imports of this product came from nine countries, with the lowest quantity (51 litres) coming from Germany. Notably, about 102 001 litres were reimports, the first such occurrence for this product.

Graph 6: Imports (quantities and value) of residual fuel oils, Q3 2010 – Q3 2021



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021. Note: There were no imports in the third quarters of 2010, 2011 and 2013, while imports for 2014 were too low to be visible on the graph.

South Africa is generally a net exporter of residual fuel oils, with exports peaking at R2.6 billion in the third quarter of 2019, before falling to R1.5 billion in the third quarter of 2020 – partly the result of the COVID-19 pandemic. However, exports have also been disrupted by a number of other factors that are discussed below. Since the third quarter of 2019, the bulk of South Africa’s residual fuel oil exports went to ship stores and bunkers (74% in the third quarter of 2019, compared to 95% for 2020 and 80% for 2021). The balance of the exports going to various other countries, including the United Arab Emirates (UAE), Namibia, and other areas not specified, among others.

Graph 7: South African trade in residual fuel oils, Q3 2010 - Q3 2021



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021.

Local production of residual fuel oils has been affected by various factors, including COVID-19, as well as the unrest in July 2021. The July unrest forced the shutdown of South African Petroleum Refineries (Sapref), which declared a force majeure and temporarily closed due to violence linked to the unrest. This has contributed to fuel shortages, including residual fuel oils, which would be produced during the normal refining process.⁴ Other refinery closures were also reported in previous [Import Tracker](#) reports, including the fire-related closure of the Engen-owned Enref – which was the largest producer of natural gas in the country. Rather than reopen the refinery, Engen is looking to turn the refinery into an import terminal and storage facility before the end of 2023.⁵

Reports have also suggested that Engen issued a tender looking to source fuel oil from Singapore, Malaysia or the Mid-East Gulf. Engen was reportedly looking to purchase 35 000 tonnes of very low-sulphur fuel oil (VLSFO) for loading from Singapore, Malaysia or the Mideast Gulf over 17-29 May 2021. It is notable that Engen’s parent company Petronas is based in Malaysia; however, according to the reports Engen rarely buys fuel oil from Malaysia. Imports of this and other liquid fuels will remain under ongoing monitoring over the coming months.

Finding 3: White Portland Cement, whether or not artificially coloured

White Portland cement (HS 25232100), similar to the widely used grey Portland cement, is a kind of hydraulic cementitious material made of white Portland cement clinker. It is predominantly used in combination with aggregates like sand and gravel to produce white concrete for prestige construction and decorative work. As it allows a wide range of colour options, it is also used in the production of architectural and structural concrete. The product further has use in road construction to increase the visibility of highway medians.⁶ In addition, white cement has applications in repairing cracks in underwater structures including swimming pools and flood control ducts.⁷ The product is produced from raw materials that are low in iron oxide, gypsum and mixed materials.

While the manufacturing process is similar to that of grey Portland cement, variations in the production method and the raw materials added differ significantly in creating white Portland cement. White Portland cement clinker is typically made of pure raw materials, including pure kaolin, pure quartz sand, pure lime or chalk, at a higher temperatures.⁸ Because it is more difficult to manufacture white cement, it tends to be priced higher than the normal Portland cement. The complex production process and high cost are attributable to factors such as the higher selectivity of raw materials and complexities involved in production.⁹ Demand is influenced by how it will be used in residential or commercial construction and related activities.¹⁰

Imports of white Portland cement surged to R36.9 million in the third quarter of 2021, from R7 million in 2019, prior to the COVID-19 pandemic. In the third quarter of 2020, imports fell to a low R4.6 million, the lowest level of third quarter imports reported during the period under review (see Graph 8).

⁴ <https://businesstech.co.za/news/energy/505802/worries-over-fuel-shortages-in-south-africa-as-major-refinery-is-forced-to-close/>

⁵ [https://www.engineeringnews.co.za/article/engen-to-shut-refinery-and-repurpose-kzn-site-as-an-import-terminal-2021-04-](https://www.engineeringnews.co.za/article/engen-to-shut-refinery-and-repurpose-kzn-site-as-an-import-terminal-2021-04-23#:~:text=South%20African%20petroleum%20products%20group,by%20the%20end%20of%202023.)

[23#:~:text=South%20African%20petroleum%20products%20group,by%20the%20end%20of%202023.](https://www.engineeringnews.co.za/article/engen-to-shut-refinery-and-repurpose-kzn-site-as-an-import-terminal-2021-04-23#:~:text=South%20African%20petroleum%20products%20group,by%20the%20end%20of%202023.)

⁶ TIPS Export Tracker Second Quarter 2020 available at www.tips.org.za

⁷ Kateřina, M. And František, Š., 2001. White Cement-Properties, Manufacture, Prospects. *Ceramics-Silikáty*, 45(4), Pp.158-163.

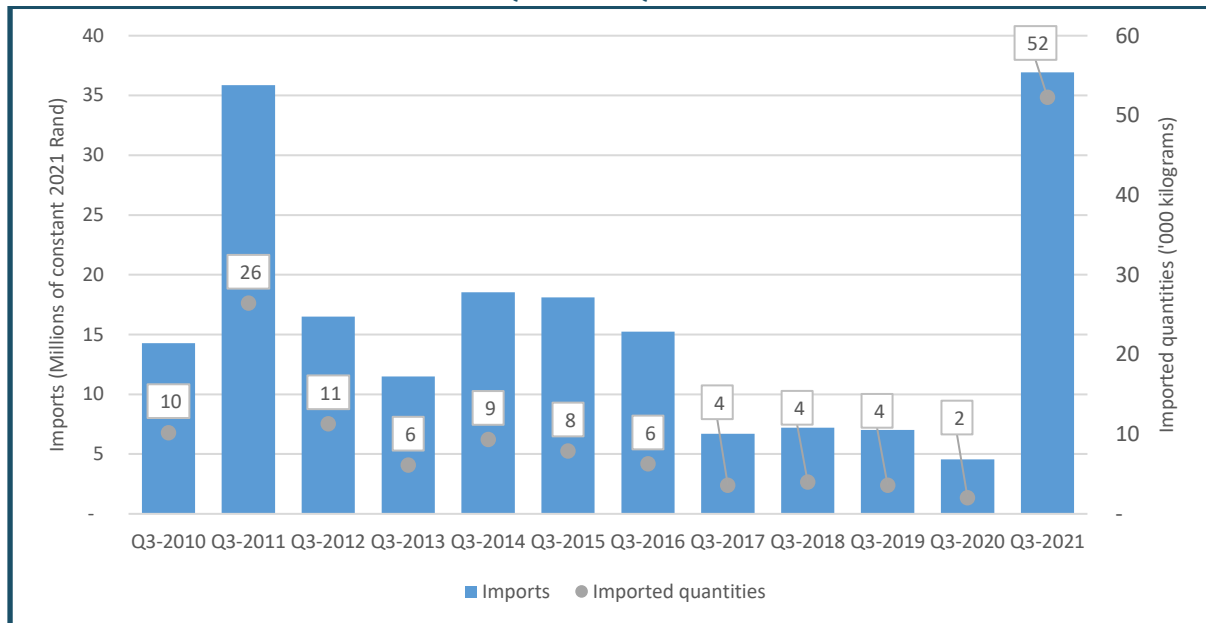
⁸ <https://cementplantsupplier.com/cement-solutions/cement-plant-for-white-cement-manufacturing/>

⁹ <https://www.businesswire.com/news/home/20210701005363/en/South-Africa-White-Cement-Market-Trends-Share-Size-Growth-Opportunity-and-Forecast-2021-2026---ResearchAndMarkets.com>

¹⁰ <https://www.cementirholding.com/en/our-business/products-and-solutions/white-cement>

About 90% of the third quarter 2021 imports came from Vietnam, which has become a major source of cement imports for South Africa. The balance of the imports came from four other countries (UAE at 5%, Egypt and Turkey at 2% apiece, and Algeria at 1%). Vietnam is not a typical source of these imports for South Africa. Rather, imports are often dominated by the UAE and Egypt.

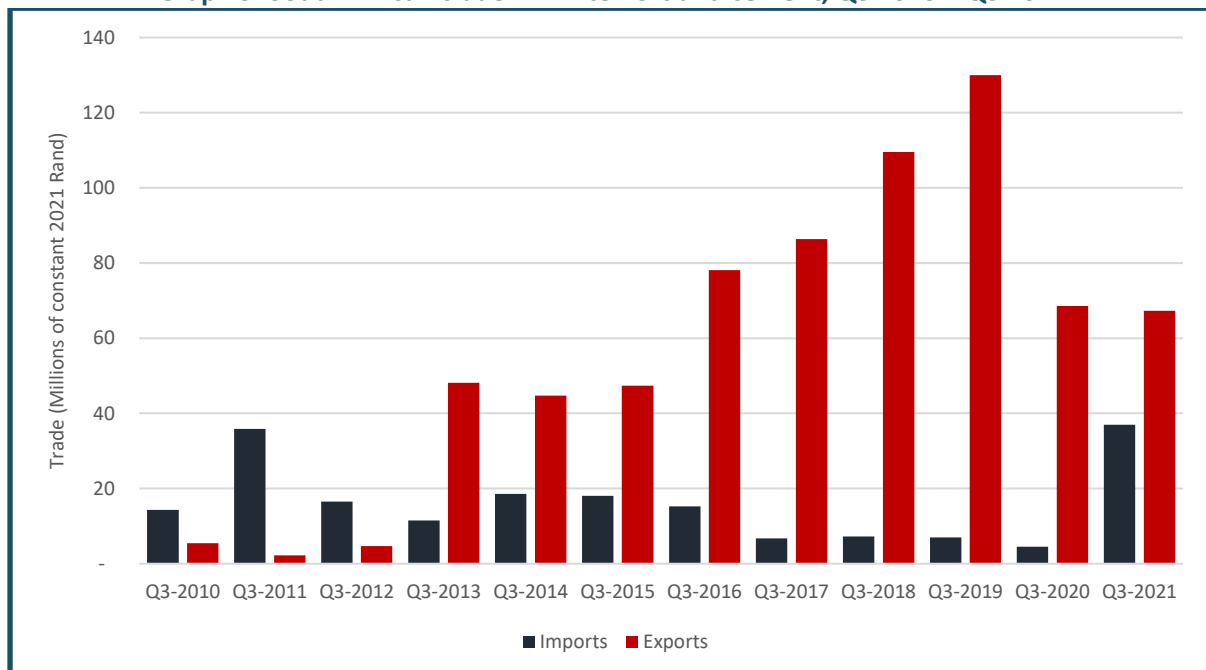
Graph 8: Imports of White Portland Cement, whether or not artificially coloured, Q3 2010 – Q3 2021



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021.

South Africa is generally a net exporter of white Portland cement, and even as imports surged in the third quarter of 2021, South Africa maintained relatively high exports (although considerably lower than third quarter exports from 2019 (see Graph 9)).

Graph 9: South African trade in white Portland cement, Q3 2010 – Q3 2021



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in December 2021.

The South African cement industry is intricately linked to limestone quarrying and lime production, and the construction and engineering industry. The industry is characterised by a relatively high level of diversification and vertical integration, with major players engaging in upstream and downstream activities. South Africa’s cement market is dominated by firms like PPC, AfriSam, Lafarge Industries South Africa (Lafarge), Sephaku Cement and NPC-Cimpor. They own and operate limestone quarries and production facilities for cement and related products.

South Africa’s construction sector has been under strain, with a poor economic performance and reduced spending on infrastructure resulting in declining sales volumes of cement in 2019. By the beginning of 2020 local producers of lime, cement and related products had declining rates of production capacity usage, weakening demand and intensifying competition for market share. Further, South Africa and its neighbours face an oversupply, with imported cement inundating an already saturated market. The challenging local operating environment is compounded by high fuel costs and energy insecurity.¹¹

In 2015 International Trade Administration Commission of South Africa (ITAC) instituted anti-dumping duties between 14.29% and 77.15% against Pakistan following an investigation that found evidence of bagged cement dumping by Pakistani exporters. Traditionally, Pakistan supplied the bulk of South Africa’s imported cement. These duties reduced the influx of Pakistani cement products. However, since 2018, Vietnam’s entry into the market has become a considerable driver of import growth. Trade data indicates this is an ongoing and growing trend as per the initial TIPS industry analysis of a surge Portland cement market in the first quarter of 2018.

Following the entry of Vietnamese cement into the South African market in 2018, cement imports increased significantly, prompting The Concrete Institute (TCI) (now under industry body Cement and Concrete South Africa) to apply to ITAC for intervention. The tariffs on Pakistan cement were set to end in December 2021 and, in December 2020, ITAC instituted a Sunset Review of the tariffs. Further, local cement producers submitted an application to ITAC to levy general tariffs on imported cement.¹² This would provide protection from imported cement from countries such as Vietnam, positioning the local industry “on the same platform as imported cement”. Certain imported cement manufacturers have the advantage of not having to adhere to regulations around cement production, including the carbon tax for instance. The local construction industry, which includes the domestic cement industry, has reportedly started discussions with the Department of Trade, Industry and Competition (the dtic) regarding implementation of a National Construction Industry Masterplan.

Lastly, in June 2021 the cement industry reported a shortage of raw materials for additives and admixtures. Additives are critical throughout the cement manufacturing process, while admixtures are widely used to enhance performance and workability of concrete. According to members of Cement & Concrete SA (CCSA), the shortage placed pressure on South African admixture and additive producers, with suppliers struggling to meet demand as the domestic construction sector gained traction in recovery efforts following the COVID-19 lockdown. Consequently, they have to import raw materials at higher prices – in the face of price instability – which in turn increases local production costs and pricing. As these high technology products are not available locally, reportedly, the local construction chemicals industry has no option but to import core materials from Europe and Asia. The issue is compounded by aforementioned pre-COVID-19 challenges. One member emphasised that

¹¹ <https://constructionreviewonline.com/prices/the-price-of-cement-in-south-africa/>

¹² https://www.engineeringnews.co.za/article/tariff-application-with-itac-waiting-for-cement-designation-to-be-gazetted-ppc-2021-07-28/rep_id:4136

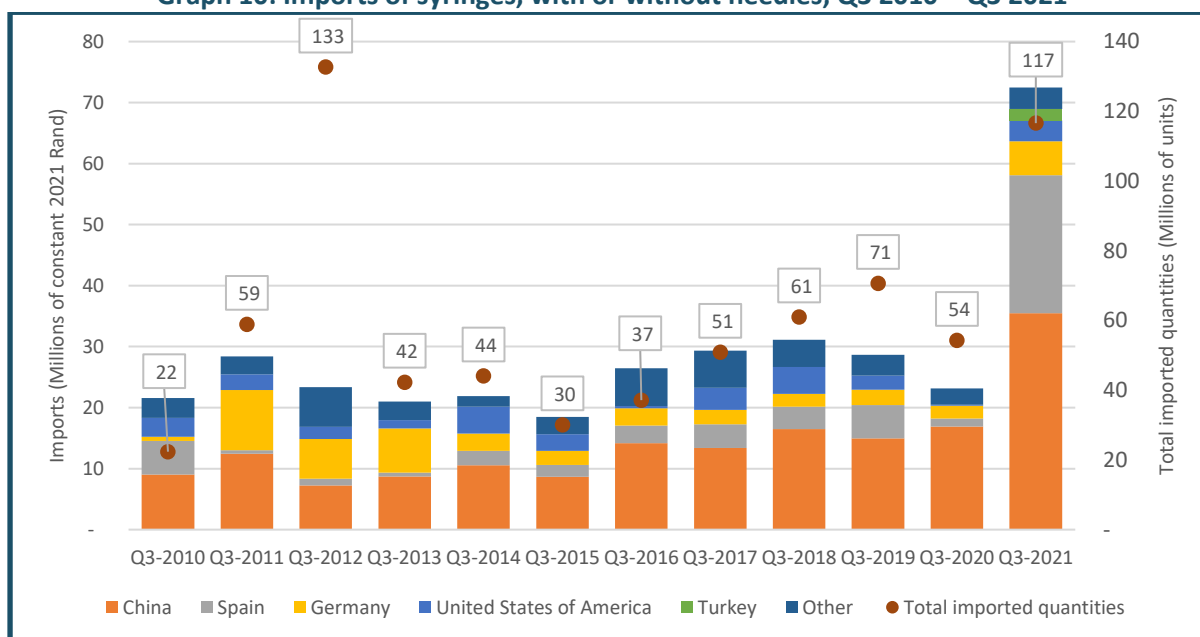
shortages of raw materials, sourced from the global petrochemical industry, are a result of factors beyond the control of local producers.¹³

Finding 4: Syringes, with or without needles

Syringes, with or without needles (HS 90183140), are predominantly used in medical, surgical, dental or veterinary sciences. The Medical Dictionary for the Health Professions and Nursing defines a syringe as a device used for injecting or withdrawing fluids.¹⁴ Disposable needles have a variety of uses including drawing blood, injecting medications such as insulin, and administering vaccines. Syringes come in different sizes, ranging anywhere between 0.5 millilitres (mL, or in some cases centimetres, or cc) to about 70 mL. The size of the syringe determines what it is used for, with smaller syringes generally used for subcutaneous or intramuscular injections, while medium-sized syringes (about 10 to 12 mL) are used for central lines and catheters, and larger syringes (about 20 to 70 mL) for irrigation (which is washing a body cavity or wound with fluids).¹⁵

Prior to the third quarter 2021 surge, third quarter imports of this product remained below 100 million units (with the exception of the third quarter of 2012), while the value remained below R50 million (see Graph 10). Nevertheless, imports for the third quarter of 2021 surged to 116.7 million kilograms, valued at R72.5 million. The bulk of the imported quantities (92%) came from China, with another 6% from Germany. The balance came from 11 countries, including Turkey, South Korea and Italy. However, in terms of the value, imports from China accounted for 49% of the total value, while Spain accounted for 31% of the total (with 54 769 units – 0.05% of total imports).

Graph 10: Imports of syringes, with or without needles, Q3 2010 – Q3 2021



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in January 2022.

Imports increased temporarily in the second quarter of 2020 (likely in anticipation of demand resulting from COVID-19) before falling in the following two quarters. However, imports began to rise again in

¹³ Concrete Beton. Number 165. June 2021.

<https://cemconsa.org.za/issues/issue165/html5/index.html?page=1&noflash>

¹⁴ Farlex.2012. Medical dictionary: definition of a syringe. Syringe | definition of a syringe by Medical dictionary (thefreedictionary.com) Date of access: 11 January 2022.

¹⁵ <https://www.vitalitymedical.com/blog/selecting-syringes-and-needles.html>

the second quarter of 2021, a trend that continued into the third quarter. This is likely due to the vaccination process, which, once extended to younger age groups, would have necessitated purchase of more syringes. South Africa does not appear to produce enough, or any syringes. Local producers of disposable medical devices focus on other things such as examination, household and industrial gloves, and import syringes.

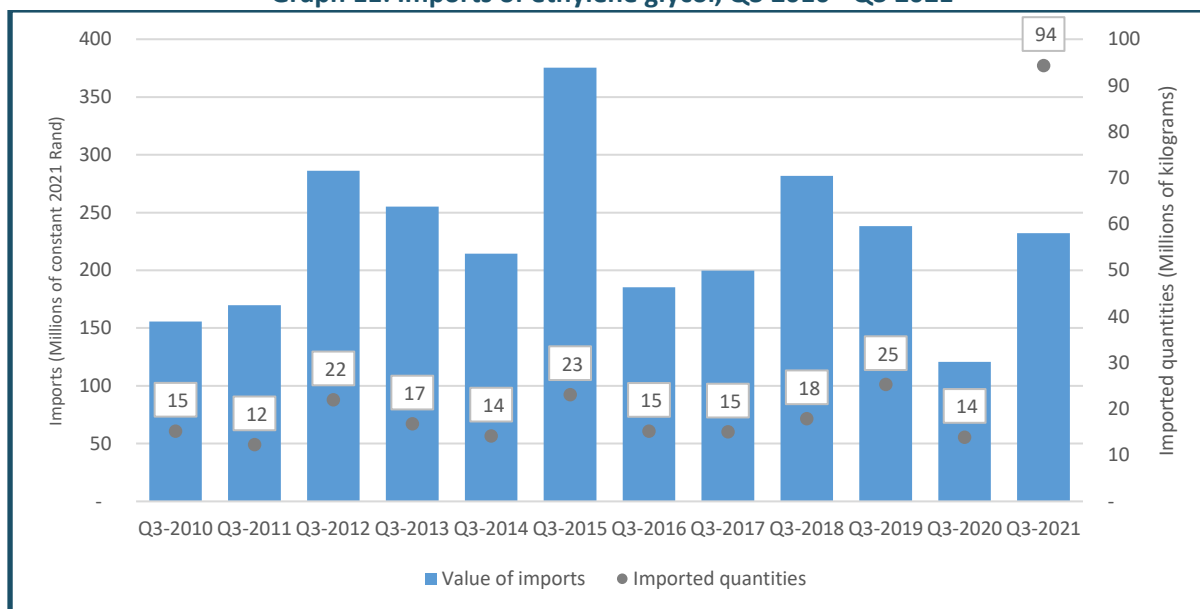
Notably, there were reports of a global syringe shortage in late 2021, with estimates suggesting that low- and middle-income countries were likely to face shortages amounting to about 1.2 to 2.2 billion 0.5 mL autodisable (AD) syringes which are commonly used for administering vaccines.¹⁶

Finding 5: Ethylene glycol “ethanediol”

Ethylene glycol (HS 29053100) is an industrial compound used in various products including antifreeze, ballpoint pens, solvents, paints, and plastics, among others. While toxic on its own, ethylene glycol also has applications in the pharmaceutical industry, where it is used as an additive to creams, as well as a solubilising agent and component for injectable formulations.¹⁷ Ethylene glycol (also referred to as monoethylene glycol) takes up the largest share of the ethylene glycols market, at about 90% of the market. The product can be manufactured using a range of raw materials, including coal, natural gas, crude oil and biomass.¹⁸

While imports of ethylene glycol tend to fluctuate, they generally remain below 30 million kilograms. However, in the third quarter of 2021, imports surged to 94.3 million kilograms, and were valued at R232 million (see Graph 11). The value of the imports, while at pre-COVID levels, has not risen at the same rate as the imported quantities. The bulk of the imports come from Saudi Arabia, which has averaged about 85% of the total value for the period between the third quarter of 2010 and the third quarter of 2021.

Graph 11: Imports of ethylene glycol, Q3 2010 - Q3 2021



Source: Calculated from ITC Trade Map data. Downloaded from <https://www.trademap.org> in February 2022.

¹⁶ <https://www.path.org/articles/syringe-shortage-explained/>

¹⁷ [https://link.springer.com/chapter/10.1007/978-1-4899-0703-5_17#:~:text=Poly\(ethylene%20glycols\)%20\(or,as%20components%20of%20injectable%20formulations.](https://link.springer.com/chapter/10.1007/978-1-4899-0703-5_17#:~:text=Poly(ethylene%20glycols)%20(or,as%20components%20of%20injectable%20formulations.)

¹⁸ https://www.researchgate.net/publication/336669733_Production_of_Ethylene_Glycol_from_Coal?channel=doi&linkId=5dab22c1a6fdccc99d91d55e&showFulltext=true

There appears to be no local production of ethylene glycol. However, Sasol’s Lake Charles Chemicals Project¹⁹ – based in the US – reached beneficial operation in August of 2019, with the Ethane Cracker able to produce up to 1.5 million tonnes a year. The ethylene produced by the plant would then be used to produce other derivatives such as ethylene oxide (a chemical used to produce ethylene glycol), mono ethylene glycol, and ethoxylates, among other products.

Nevertheless, it is not clear what caused the surge in imports. However, in terms of supply, the surge from Saudi Arabia could possibly be the result of the country looking for replacement markets while they initiated a World Trade Organization (WTO) dispute against European Union (EU) provisional anti-dumping duties on mono-ethylene glycol.²⁰ Requests by Saudi Arabia for dispute consultations were circulated in August 2021. With initial start-up activities already under way for SABIC’s – Saudi Arabia’s multinational chemicals manufacturer – 700 000 metric tonne per annum monoethylene glycol plant, Saudi Arabia will be looking to resolve the anti-dumping dispute and also establish new, or grow their existing markets for the product.

Finding 6: Data errors

Table 3 provides a list of possible data errors for the third quarter of 2021.

Table 3: Possible data errors and other issues

HS CODE	PRODUCT DESCRIPTION	DESCRIPTION OF ERROR
85177090	Parts for telephones, routers and other telecoms devices	Error in reporting quantity from China. The surge in reported quantities is not matched by a corresponding increase or surge in the value of imports. Reported quantities for the third quarter increased to seven billion kilograms from 1.4 million kilograms in the second quarter. However, the value of the imports over the same period declined to R967.4 million from R1.4 billion. Third quarter data from China is not yet publicly available for comparison.
84733000	Parts and accessories of automatic data-processing machines	Error in reporting quantity from China. The surge in imported quantities is not matched by a corresponding surge in value. Reported quantities surged to 6.1 billion kilograms in the third quarter of 2021 from 653 827 kilograms in the previous quarter. However, over the same period, the value of imports declined to R589,4 million from R634.6 million.
39069090	Acrylic polymers, in primary forms (excl. poly“methyl methacrylate”): Other	Error in reporting quantity from South Korea. This is the second consecutive quarter of reporting this error. Generally, imports average about 11 million kilograms per quarter. However, reported imports surged to 193.8 million kilograms, which was flagged as an error. Reported imports for the third quarter surged to 736.9 million kilograms. Prior to the first report of a data error, the value of imports fluctuated to about R380 million. In the second quarter of 2021, the value increased to R398 million, before rising to R449 million in the third quarter. The bulk of these imports are reported to have come from South Korea. Notably here, South Korea reportedly exported about 229.9 million kilograms of this product in total in the third quarter, far lower than 723.1 million kilograms reported to have been imported by South Africa from South Korea

¹⁹ Sasol sold a 50% stake of its base chemicals unit at Lake Charles to LyondellBasell for US\$2 billion.

²⁰ <https://docs.wto.org/dol2fe/Pages/SS/directdoc.aspx?filename=q:/WT/DS/606-1.pdf&Open=True>

HS CODE	PRODUCT DESCRIPTION	DESCRIPTION OF ERROR
85444290	Electric conductors for a voltage <= 1.000 V, insulated, fitted with connectors: Other	Error in reporting quantity from China. The reported surge in imported quantities is not matched by a corresponding surge in the value of imports. Imports are reported to have surged to 508.4 million kilograms in the third quarter of 2021 from 1.6 million kilograms in the previous quarter, with the bulk of the imports coming from China. Over this period, the value of the imports declined to R240.9 million from R245.5 million.
96032100	Tooth brushes, including dental-plate brushes	Error in reporting quantity from Italy. The surge in imported quantities is not matched by a corresponding increase in the value. The bulk of the imports reportedly came from Italy – 210 million units, and were valued at about R14 000. This could be a conversion error, from kilograms as reported by Italy, to units as reported by South Africa.
29094900	Ether-alcohols and their halogenated, sulphonated, nitrated or nitrosated derivatives	Error in reporting quantity from China. Imports are reported to have surged to 80 million kilograms in the third quarter of 2021 from 2.6 million kilograms in the previous quarter. Of that, about 78 million kilograms are reported to have come from China. However, over the same period, the value of imports from China only rose to R18.9 million from R16.8 million, far lower than R29.6 million in imports from Germany, which accounted for 932 207 kilograms in the third quarter.
84662000	Work holders for machine tools	Error in reporting quantity from China. Imports from China reportedly rose to 41.9 million kilograms in the third quarter of 2021, from 30 553 kilograms in the previous quarter. Over the same period, imports from the US reportedly rose to 15 979 kilograms from 6 679 kilograms. However, over the same period, the value of imports from China rose to R6.1 million from R1.4 million, while the value of imports from the US rose to R14.1 million from R3.7 million. While no third quarter data is available to compare for China, it is worth noting that past data suggest that Chinese exports of this product average about four million kilograms per quarter, far lower than the 41 million reported by South Africa.

DATA ANNEXURES

Annexure 1: Top 100 import products by Rand value, Q3 2021

Rank	HS Code	Product Description	Import value, Rand Billion	Change in rank Q3 2020 - Q3 2021	Designation status
1	27090000	Crude oil	26.05	No change	Not designated
2	27101230	Diesel	19.26	No change	Not designated
3	98010030	Automotive components: for motor cars	12.89	No change	Not designated
4	98010040	Original equipment components: for goods vehicles	8.76	No change	Not designated
5	85171210	Cellphones	6.05	No change	Not designated
6	27101202	Light oils and preparations: Petrol	5.76	2	Not designated
7	87032290	Cars and related vehicles: cylinder capacity 1 000 cm ³ to 1 500 cm ³	4.98	2	Not designated
8	98010045	Original equipment components: for goods vehicles	3.30	7	Not designated
9	85176290	Routers and set-top boxes: Other	2.90	-2	Not designated
10	31021000	Urea, whether or not in aqueous solution	2.76	15	Not designated
11	71023100	Non-industrial diamonds unworked or simply sawn, cleaved or bruted	2.72	6	Not designated
12	87032390	Cars and related vehicles: cylinder capacity 1 500 cm ³ to 3 000 cm ³	2.57	2	Not designated
13	71081300	Gold, in semi-manufactured forms, for non-monetary purposes	2.07	-2	Not designated
14	10063000	Semi-milled or wholly milled rice, whether or not polished or glazed	2.05	-8	Not designated
15	87032190	Cars and related vehicles: cylinder capacity not exceeding 1 000 cm ³	1.98	9	Not designated
16	28182000	Aluminium oxide (excluding artificial corundum)	1.95	-4	Not designated
17	74081100	Wire of refined copper, with a maximum cross-sectional dimension of > 6 mm	1.80	11	Not designated
18	33021000	Alcoholic and other solutions used in the food and drink industries	1.71	-2	Not designated
19	98010015	Automotive components: for tractors and buses	1.64	66	Not designated
20	31054000	Ammonium dihydrogenorthophosphate	1.50	32	Not designated
21	85044000	Static converters	1.45	2	Not designated
22	38220000	Diagnostic or laboratory reagents (pharmaceutical chemicals)	1.44	-3	Not designated
23	84715000	Processing units for automatic data-processing machines	1.42	-2	Not designated

Rank	HS Code	Product Description	Import value, Rand Billion	Change in rank Q3 2020 - Q3 2021	Designation status
24	87089990	Parts and accessories for tractors and buses	1.32	16	Not designated
25	90189000	Medical instruments and appliances, n.e.s.	1.26	-7	Not designated
26	84314990	Parts of machinery of heading 8426, 8429 and 8430, n.e.s. : Other	1.20	-6	Not designated
27	28439000	Inorganic or organic compounds of precious metals	1.18	8	Not designated
28	87082900	Parts and accessories of bodies for tractors and buses	1.17	13	Not designated
29	84439900	Parts and accessories of printers, copying machines and facsimile machines, n.e.s.	1.09	1	Not designated
30	87032490	Cars and related vehicles: cylinder capacity exceeding 3 000 cm3	1.09	26	Not designated
31	27160000	Electrical energy	1.06	-4	Not designated
32	27111100	Natural gas, liquefied	1.06	-1	Not designated
33	84295200	Self-propelled bulldozers, etc.: with 360 degree revolving superstructure	1.01	14	Not designated
34	27101235	Light oils and preparations: Residual fuel oils	0.99	10	Not designated
35	27011200	Bituminous coal	0.98	11	Not designated
36	87033390	Cars and related vehicles: cylinder capacity exceeding 2 500 cm3	0.98	No change	Not designated
37	87041090	Dumpers for off-highway use: Other	0.97	-15	Not designated
38	98010025	Original equipment components: for buses and taxis	0.97	11	Not designated
39	87042181	Vehicles for the transport of goods: Other	0.96	120	Not designated
40	85177090	Parts for telephones, routers and other telecoms devices	0.95	-11	Not designated
41	87033290	Cars and related vehicles: cylinder capacity 1 000 cm3 to 2 500 cm3	0.88	-15	Not designated
42	27040000	Coke and semi-coke of coal, of lignite or of peat, whether or not agglomerated	0.82	271	Not designated
43	61091000	T-shirts, singlets and other vests of cotton, knitted or crocheted	0.75	2	100% designated
44	88033000	Parts of aeroplanes or helicopters, n.e.s. (excluding those for gliders)	0.71	28	Not designated
45	39269090	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s.: Other	0.71	17	Not designated
46	95030090	Tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages: Other	0.69	5	Not designated
47	31042000	Potassium chloride for use as fertiliser	0.66	-15	Not designated
48	22083010	Whiskies: In containers holding 2 li or less	0.65	7	Not designated

Rank	HS Code	Product Description	Import value, Rand Billion	Change in rank Q3 2020 - Q3 2021	Designation status
49	21069090	Food preparations, n.e.s.: Other	0.64	-6	Not designated
50	74031100	Copper, refined, in the form of cathodes and sections of cathodes	0.63	10	Not designated
51	27101207	Light oils and preparations: Aviation kerosene	0.63	-12	Not designated
52	84717000	Storage units for automatic data-processing machines	0.61	-10	Not designated
53	85152100	Fully or partly automatic machines for resistance welding of metals	0.60	1734	Not designated
54	64039990	Footwear with rubber or plastic soles: Other	0.58	-6	100% designated
55	85437000	Electrical machines and apparatus, having individual functions, n.e.s. in chapter 85	0.58	24	Not designated
56	84733000	Parts and accessories of automatic data-processing machines	0.58	-19	Not designated
57	27111200	Propane, liquefied	0.57	95	Not designated
58	85443000	Ignition wiring sets and other wiring sets for vehicles, aircraft or ships	0.56	9	90% designated
59	69091900	Ceramic wares for chemical or other technical uses	0.55	19	Not designated
60	33049990	Beauty or make-up preparations and preparations for the care of the skin: Other	0.55	3	Not designated
61	27101215	Light oils and preparations: Illuminating kerosene	0.55	453	Not designated
62	38170010	Mixed alkylbenzenes and mixed alkylnaphthalenes	0.55	38	Not designated
63	27131200	Petroleum coke, calcined	0.54	68	Not designated
64	87042183	Motor vehicles for the transport of goods	0.50	32	Not designated
65	87083090	Brakes and servo-brakes and their parts, n.e.s.: Other	0.50	36	Not designated
66	84749000	Parts of machinery for working mineral substances of heading 8474, n.e.s.	0.49	7	Not designated
67	84433100	Printers and fax machines	0.49	-3	Not designated
68	39041000	Poly"vinyl chloride", in primary forms, not mixed with any other substances	0.49	202	Not designated
69	84798990	Machines and mechanical appliances, n.e.s.: Other	0.49	-36	Not designated
70	22030090	Beer made from malt: Other	0.49	158	Not designated
71	38151200	Supported catalysts with precious metal or a precious-metal compound as the active substance, n.e.s.	0.48	54	Not designated
72	85444990	Electric conductors, for a voltage <= 1.000 V, insulated, not fitted with connectors: Other	0.47	77	90% designated

Rank	HS Code	Product Description	Import value, Rand Billion	Change in rank Q3 2020 - Q3 2021	Designation status
73	38112100	Prepared additives for oil lubricants containing petroleum oil or bituminous mineral oil	0.47	1	Not designated
74	84099990	Parts suitable for use solely or principally with diesel or semi-diesel engine, n.e.s.: Other	0.46	-9	Not designated
75	39072090	Polyethers, in primary forms (excluding polyacetals and goods of 3002 10): Other	0.46	49	Not designated
76	73269090	Articles of iron or steel, n.e.s: Other	0.45	5	100% designated
77	84089090	Compression-ignition internal combustion piston engine "diesel or semi-diesel engine": Other	0.44	-8	Not designated
78	84314300	Parts for boring or sinking machinery of subheading 8430.41 or 8430.49, n.e.s.	0.44	-17	Not designated
79	39069090	Acrylic polymers, in primary forms (excluding poly"methyl methacrylate"): Other	0.44	26	Not designated
80	31022100	Ammonium sulphate	0.44	34	Not designated
81	25030000	Sulphur of all kinds (excluding sublimed sulphur, precipitated sulphur and colloidal sulphur)	0.44	193	Not designated
82	28141000	Anhydrous ammonia	0.43	136	Not designated
83	85258090	Television cameras, digital cameras and video camera recorders: Other	0.43	29	Not designated
84	23040000	Oilcake and other solid residues from the extraction of soya-bean oil	0.43	-25	Not designated
85	90318000	Instruments, appliances and machines for measuring or checking	0.42	-9	Not designated
86	76069290	Plates, sheets and strip, of aluminium alloys: Other	0.41	293	Not designated
87	33029090	Mixtures of odoriferous substances and mixtures, including alcoholic solutions: Other	0.41	-17	Not designated
88	84621090	Forging or die-stamping machines, incl. presses, and hammers: Other	0.41	599	Not designated
89	85371090	Boards and cabinets etc. of apparatus for electricity control or distribution, voltage <= 1.000 V: Other	0.41	-9	Not designated
90	84139100	Parts of pumps for liquids, n.e.s.	0.39	1	Not designated
91	02071210	Frozen fowls of the species Gallus domesticus, not cut in pieces : Mechanically deboned meat	0.39	8	Not designated
92	84834000	Gears and gearing for machinery	0.39	-26	Not designated
93	79011100	Unwrought zinc, not alloyed	0.38	16	Not designated

Rank	HS Code	Product Description	Import value, Rand Billion	Change in rank Q3 2020 - Q3 2021	Designation status
94	05040010	Guts, bladders and stomachs of animals: Sausage casings	0.38	-6	Not designated
95	85235100	Solid-state, non-volatile data storage devices for recording data from an external source	0.37	55	Not designated
96	27101900	Medium oils and preparations, of petroleum or bituminous minerals, not containing biodiesel	0.37	85	Not designated
97	87085085	Drive-axles with differential	0.37	139	Not designated
98	84148000	Air pumps, air or other gas compressors and ventilating or recycling hoods incorporating a fan	0.37	No change	Not designated
99	84839000	Toothed wheels, chain sprockets and other transmission elements presented separately; parts of transmission shafts, ball screws, couplings and other articles of heading 8483, n.e.s.	0.37	-5	Not designated
100	88024000	Aeroplanes and other powered aircraft of an of an unladen weight > 15.000 kg	0.36	3029	Not designated

Annexure 2: Surges in import products, by quantity, Q3 2021

HS Code	Product Description	Explanation	Real Growth/Decline, Quantity	Unit	Percent Growth/Decline	Designation status
85177090	Parts for telephones, routers and other telecoms devices	Data error	6 979 049 354	Kilograms	665177%	Not designated
84733000	Parts and accessories of automatic data-processing machines	Data error	6 123 581 886	Kilograms	974496%	Not designated
27090000	Crude oil	Import commodity	1 335 040 110	Kilograms	46%	Not designated
27101230	Diesel	Import commodity	476 456 131	Litres	23%	Not designated
27111100	Natural gas, liquefied	Decline in imports	- 49 663 021	Kilograms	-6%	Not designated
39069090	Acrylic polymers, in primary forms (excluding poly"methyl methacrylate"): Other	Data error	726 891 811	Kilograms	7241%	Not designated
27101202	Light oils and preparations: Petrol	Import commodity	280 020 936	Litres	63%	Not designated
85444290	Electric conductors for a voltage <= 1.000 V, insulated, fitted with connectors: Other	Data error	507 084 949	Kilograms	39904%	90% designated
27011200	Bituminous coal	Import commodity	99 151 371	Kilograms	25%	Not designated
31021000	Urea, whether or not in aqueous solution	Not significant	126 500 149	Kilograms	44%	Not designated
28182000	Aluminium oxide (excl. artificial corundum)	Not significant	75 455 776	Kilograms	23%	Not designated
25232900	Portland cement	Decline in imports	- 29 654 687	Kilograms	-9%	Not designated
10063000	Semi-milled or wholly milled rice, whether or not polished or glazed	Decline in imports	- 48 009 599	Kilograms	-15%	Not designated
96032100	Tooth brushes, including dental-plate brushes	Data error	207 332 574	Units	2460%	Not designated
27040000	Coke and semi-coke of coal, of lignite or of peat, whether or not agglomerated	Surge within usual variance	176 609 394	Kilograms	484%	Not designated
01069000	Live animals	Decline in imports	- 107 745 396 587	Units	-99.8%	Not designated
25030000	Sulphur of all kinds	Not significant	36 243 155	Kilograms	29%	Not designated
27101235	Light oils and preparations: Residual fuel oils	Selected for analysis	90 238 600	Litres	132%	Not designated
31054000	Ammonium dihydrogenorthophosphate	Not significant	56 420 606	Kilograms	56%	Not designated
31042000	Potassium chloride for use as fertiliser	Decline in imports	- 71 442 299	Kilograms	-32%	Not designated

HS Code	Product Description	Explanation	Real Growth/Decline, Quantity	Unit	Percent Growth/Decline	Designation status
25231000	Cement clinkers	Ongoing monitoring	37 566 964	Kilograms	35%	Not designated
28042900	Rare gases (excl. argon)	Surge within usual variance	118 968 967	Cubic metres	532%	Not designated
31022100	Ammonium sulphate	Not significant	29 662 801	Kilograms	27%	Not designated
90183140	Syringes, with or without needles	Selected for analysis	62 347 067	Units	115%	Not designated
44079100	Oak "Quercus spp.", sawn or chipped lengthwise, sliced or peeled	Surge within usual variance	115 599 919	Cubic metres	1008196%	Not designated
27011900	Coal, whether or not pulverised, non-agglomerated (excluding anthracite and bituminous coal)	Not significant	38 730 117	Kilograms	58%	Not designated
31024000	Mixtures of ammonium nitrate with calcium carbonate or other inorganic non-fertilising substances for use as fertilisers	Not significant	40 799 829	Kilograms	73%	Not designated
44072500	Dark red meranti, light red meranti and meranti bakau, sawn or chipped lengthwise	Surge within usual variance	95 612 922	Cubic metres	169488%	Not designated
29053100	Ethylene glycol "ethanediol"	Selected for analysis	80 467 170	Kilograms	582%	Not designated
28362000	Disodium carbonate	Decline in imports	- 51 982 479	Kilograms	-37%	Not designated
27101207	Light oils and preparations: Aviation kerosene	Decline in imports	- 48 461 603	Litres	-36%	Not designated
27101215	Light oils and preparations: Illuminating kerosene	Ongoing monitoring	66 627 531	Litres	438%	Not designated
29094900	Ether-alcohols and their halogenated, sulphonated, nitrated or nitrosated derivatives	Data error	77 299 327	Kilograms	2677%	Not designated
28151200	Sodium hydroxide "caustic soda" in aqueous solution "soda lye or liquid soda"	Not significant	33 535 413	Kilograms	72%	Not designated
27131200	Petroleum coke, calcined	Not significant	17 100 462	Kilograms	30%	Not designated
85235210	Cards incorporating one or more electronic integrated circuits "smart cards": Digital	Decline in imports	- 3 852 944	Units	-5%	Not designated
23040000	Oilcake and other solid residues from the extraction of soya-bean oil	Decline in imports	- 14 703 107	Kilograms	-17%	Not designated

HS Code	Product Description	Explanation	Real Growth/Decline, Quantity	Unit	Percent Growth/Decline	Designation status
98010040	Original equipment components: for goods vehicles	Import commodity	29 436 828	Kilograms	93%	Not designated
85411000	Diodes (excluding photosensitive or light emitting diodes "LED")	Not significant	27 350 020	Units	88%	Not designated
31026000	Double salts and mixtures of calcium nitrate and ammonium nitrate	Surge within usual variance	31 970 343	Kilograms	148%	Not designated
27111200	Propane, liquefied	Ongoing monitoring	31 651 874	Kilograms	149%	Not designated
98010030	Automotive components: for motor cars	Not significant	17 665 940	Kilograms	51%	Not designated
25232100	White Portland cement, whether or not artificially coloured	Selected for analysis	50 256 666	Kilograms	2481%	Not designated
27011100	Anthracite, whether or not pulverised, non-agglomerated	Decline in imports	- 36 900 921	Kilograms	-42%	Not designated
84248900	Mechanical appliances for projecting, dispersing or spraying liquids or powders, n.e.s.	Not significant	12 947 709	Units	34%	Not designated
28331100	Disodium sulphate	Decline in imports	- 6 532 661	Kilograms	-11%	Not designated
28141000	Anhydrous ammonia	Not significant	5 909 940	Kilograms	14%	Not designated
84662000	Work holders for machine tools	Data error	41 922 343	Kilograms	269857%	Not designated
02071210	Frozen fowls of the species Gallus domesticus, not cut in pieces: Mechanically deboned meat	Decline in imports	- 5 660 079	Kilograms	-12%	Not designated
71051000	Dust and powder of diamonds, including synthetic diamonds	Surge within usual variance	39 552 935	Carats	3155%	Not designated