



# SA - METROS-LEVEL EXPOSURE TO US TRADE SHIFTS: TARIFF VULNERABILITIES AND STRATEGIC EXPORT RISKS

High Level Overview  
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## 1. South Africa's Exports to the United States: Strategic Overview & Tariff Exposure

In 2024, South Africa exported R156.6 billion worth of goods to the United States, positioning the US as one of the country's top trade partners. These exports span vehicles, precious metals, aluminium, ores, and mineral products, many of which are sensitive to evolving US trade policies, such as Section 232 (national security tariffs), the Inflation Reduction Act (IRA), and critical mineral regulations.

### Economic Contribution:

- **Total export current value to the US: R156,593,987,016**
- **South Africa's GDP (current value 2024): R7,336,242 million**
- **Contribution to GDP: 2.1%**

This illustrates that trade with the US contributes approximately **2.1%** to the national GDP, making it a significant pillar of the South African economy.

### Top 10 Products Exported to the US (2024)

Rank	HS Code & Description	Export Value	Risk of Tariff/Regulatory Exposure
1	<b>HST870323</b> – Motor vehicles (1500–3000cc)	R26,344,801,121	High (auto tariffs, emissions/EV policy)
2	<b>HST711021</b> – Palladium, unwrought or in powder	R13,023,642,474	Moderate (critical minerals)
3	<b>HST711011</b> – Platinum, unwrought or in powder	R11,901,921,340	Moderate (strategic/green transition metal)

4	HST711031 – Rhodium, unwrought or in powder	R8,597,327,140	Moderate
5	HST760110 – Aluminium, not alloyed	R8,019,164,173	High (Section 232 tariffs)
6	HST711039 – Rhodium, other	R6,096,170,016	Moderate
7	HST711019 – Platinum, other	R5,352,029,591	Moderate
8	HST720241 – Ferrochrome (Cr > 4%)	R3,904,730,090	High (steel and metal tariffs)
9	HST261400 – Titanium ores and concentrates	R3,658,934,944	Moderate (aerospace, defence uses)
10	HST711319 – Other precious metals, not plated or clad	R3,029,262,960	Moderate

Source: Quantec. (2025)

### Key Takeaways:

- The top 10 products alone account for R89.93 billion, or 57.4% of total exports to the United States.
- Many of these products fall into strategic or sensitive trade categories, including:
  - Automotive: At high risk of future protectionist measures or carbon-linked tariffs.
  - Precious metals: Crucial for clean technologies (e.g., catalytic converters, hydrogen fuel cells).
  - Aluminium and ferroalloys: Subject to ongoing trade tension and anti-dumping duties.
- Maintaining preferential access under AGOA and positioning South Africa as a reliable critical minerals supplier is vital for trade sustainability.

## 2. City of Cape Town's Exports to the United States: Strategic Product Composition & Economic Contribution

In 2024, the City of Cape Town exported goods worth approximately R10.89 billion to the United States. These exports reflect the metro's economic diversity, particularly in marine products, agri-processing, diagnostic reagents, aerospace parts, and precision chemicals.

### Economic Contribution:

- **Total export current value to the US (Cape Town): R10,894,917,743**
- **Cape Town's GVA (current value 2024): R668,511.57 million**
- **% Contribution to GVA from US Exports: 1.6%**

Thus, US-bound exports represent approximately **1.63%** of Cape Town's GVA, a significant figure given the city's trade exposure to global markets.

Top 10 Products Exported to the United States from Cape Town 2024

Rank	HS Code & Description	Export Value (R)	Tariff/Regulatory Exposure
1	HST711319 – Other precious metals, not plated/clad	R2,823,766,263	Moderate (critical minerals policy)
2	HST840999 – Parts for engines (other)	R844,794,337	High (auto parts tariff, industrial policy)
3	HST852910 – Aerials and reflectors for radio/TV	R704,583,380	Moderate (telecoms tech, import restrictions)
4	HST890332 – Motorboats (excl. outboards)	R687,880,067	Moderate (luxury tax, product safety)
5	HST890322 – Sailboats (non-inflatable)	R555,760,110	Moderate
6	HST330499 – Beauty/cosmetic prep (other)	R416,775,400	Low (depends on ingredients compliance)
7	HST030611 – Rock lobster/sea crawfish (live/fresh/chilled)	R391,099,406	High (food safety, phytosanitary standards)
8	HST382219 – Diagnostic/lab reagents	R211,511,781	Moderate (FDA regulation, biotech policy)
9	HST720241 – Containers (≤2 litres)	R204,964,540	Low
10	HST080521 – Mandarins/tangerines/satsumas	R197,217,500	High (agricultural quota/sanitary control)

Source: Quantec. (2025)

Key Observations:

- The top 10 products account for approximately R7.96 billion, which is 73.1% of Cape Town’s total exports to the United States.
- High-performing categories include:
  - Precision manufacturing (engine parts, telecom reflectors)
  - Agri-marine exports (rock lobster, mandarins)
  - High-value niche segments (diagnostics, precious metals, luxury boats)
- Some products (e.g., seafood, fruit) are highly sensitive to SPS standards and US food import rules, while others may be impacted by shifting US trade policies on high-tech goods, engines, or luxury marine products.

3. EThekweni Metro’s Exports to the United States: Strategic Product Profile & Economic Contribution

In 2024, eThekweni Municipality (Durban) exported goods worth approximately R2.66 billion to the United States, showcasing the metro's integration in global value chains, particularly in metals, chemicals, automotive parts, and processed agricultural products.

**Economic Contribution:**

- **Total export current value to the US (eThekweni): R2,657,977,945**
- **EThekweni GVA (current value2024): R587,581.73 million**
- **Contribution of US Exports to GVA: 0.45%**

Thus, US-bound exports represent approximately 0.45% of Durban’s GVA, a significant figure given the city’s trade exposure to global markets. This reflects Durban’s role as a key industrial-export hub, especially for processed materials and manufactured components.

**Top 10 Products Exported to the United States from eThekweni (2024)**

Rank	HS Code & Description	Export Value (R)	Tariff/Policy Sensitivity
1	HST760820 – Aluminium alloys	R398,340,315	High (Section 232, base metals scrutiny)
2	HST170114 – Cane sugar (other)	R335,652,206	High (US sugar quotas, agri-trade rules)
3	HST293212 – 2-Furfuraldehyde (chemical intermediate)	R214,548,826	Moderate (chemical standards, pharma trade)
4	HST480419 – Paper and board (Other)	R126,544,203	Low (low-tariff good)
5	HST740729 – Copper bars/rods/profiles (Other)	R120,734,265	Moderate (metal pricing, industrial use)
6	HST847990 – Parts for machinery	R103,697,357	High (auto/tech import policy)
7	HST150210 – Tallow (animal oil/fat)	R98,021,077	High (sanitary & phytosanitary regulations)
8	HST740721 – Brass rods/profiles (copper-zinc alloys)	R94,916,733	Moderate (non-ferrous metals tariffs)
9	HST870899 – Auto parts (other)	R79,464,681	High (vehicle components, Section 232)
10	HST300510 – Adhesive dressings and medical articles	R77,023,107	Moderate (FDA regulation, health goods)

Source: Quantec. (2025)

**Key Insights:**

- The top 10 export products account for R1.65 billion, representing 62% of eThekweni's total US export value.
- EThekweni's exports reflect a strong base in manufacturing and chemicals, with a growing niche in agri-processing and medical articles.
- Products such as sugar, aluminium, and auto parts face elevated risks from tariff shifts, quotas, and regulatory changes.
- Chemical exports (e.g., furfuraldehyde) and processed oils also face scrutiny under US environmental and safety regulations.

#### 4. Ekurhuleni’s Exports to the United States: Industrial Strength & Economic Contribution

In 2024, Ekurhuleni Metropolitan Municipality—Gauteng’s key industrial and logistics hub, exported approximately R4.70 billion worth of goods to the United States. These exports reflect the city’s advanced industrial base, especially in aerospace, metals, mechanical parts, and specialty manufacturing.

##### Economic Contribution:

- **Total export current value to the US (Ekurhuleni): R4,701,795,955**
- **Ekurhuleni GVA (current 2024): R511,033.79 million**
- **% Contribution of US Exports to GVA: 0.92%**

US-bound exports thus make up nearly 0.92% of the metro's GVA, highlighting Ekurhuleni’s integration into global aerospace and manufacturing value chains.

##### Top 10 Products Exported to the United States from Ekurhuleni (2024)

Rank	HS Code & Description	Export Value (R)	Tariff/Policy Sensitivity
1	<b>HST841112</b> – Jet engines (thrust >25kN)	R306,234,000	High (aviation policy, tech transfer scrutiny)
2	<b>HST820719</b> – Tools & parts (other, incl. interchangeable)	R215,573,252	Moderate
3	<b>HST711890</b> – Other precious metal products	R203,441,097	Moderate
4	<b>HST853620</b> – Automatic circuit breakers	R189,059,047	Low to moderate (depends on electronics policy)
5	<b>HST711319</b> – Other precious metals (not plated/clad)	R164,442,193	Moderate (critical minerals policy)
6	<b>HST843149</b> – Parts for heavy machinery (other)	R162,308,360	High (industrial equipment tariffs)

7	<b>HST880790</b> – Aircraft parts (not elsewhere classified)	R158,848,112	High (aerospace, national security)
8	<b>HST080910</b> – Fruit (other – likely citrus/stonefruit)	R130,080,171	High (agri-tariffs, SPS controls)
9	<b>HST848340</b> – Gears and gearing	R129,622,624	Moderate
10	<b>HST840999</b> – Engine parts (other)	R124,027,745	High (auto/engine regulation)

Source: Quantec. (2025)

### Key Insights:

- The top 10 export products make up approximately R1.81 billion, or 38.6% of Ekurhuleni’s total US exports.
- Ekurhuleni’s exports are heavily skewed toward high-tech and aerospace manufacturing, with strong showing in jet engines, electrical components, engine parts, and aircraft equipment.
- Several items are subject to strategic trade controls, especially those falling under aerospace, dual-use technologies, or sensitive electronics.
- This underscores the importance of maintaining favourable bilateral trade agreements, navigating US export/import controls, and protecting AGOA eligibility.

## 5. City of Johannesburg’s Exports to the United States: Mineral Wealth & Economic Significance

In 2024, the City of Johannesburg exported approximately R56.62 billion worth of goods to the United States, making it one of the largest metro-level contributors to South Africa’s trade with the US. This trade is dominated by precious metals, especially palladium, platinum, rhodium, and related mineral products, underscoring Johannesburg’s position as the mineral finance and trading hub of the country.

### Economic Contribution:

- **Total export current value to the US (Johannesburg): R56,619,347,085**
- **Johannesburg GVA (current value 2024): R885,090.83 million**
- **% Contribution of US Exports to GVA: 6.4%**

This is the highest export-to-GVA ratio among major metros, showing the city's strategic role in global mineral supply chains and precious metal trade.

### Top 10 Products Exported to the United States from Johannesburg (2024)

Rank	HS Code & Description	Export Value (R)	Tariff/Policy Sensitivity
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1	<b>HST711021</b> – Palladium, unwrought or in powder form	R13,023,642,474	Moderate (critical mineral policy)
2	<b>HST711011</b> – Platinum, unwrought or in powder form	R11,881,386,263	Moderate (EV & clean tech inputs)
3	<b>HST711031</b> – Rhodium, unwrought or in powder form	R8,597,327,140	Moderate
4	<b>HST720241</b> – Ferroalloys (>4% carbon content)	R2,754,573,316	High (steel tariffs, US Section 232)
5	<b>HST261800</b> – Granulated slag (from iron/steel manufacture)	R2,229,436,766	Moderate
6	<b>HST711041</b> – Iridium, osmium, ruthenium – unwrought or in powder	R1,936,104,159	Moderate (rare metals, supply chain scrutiny)
7	<b>HST290129</b> – Other hydrocarbons	R1,403,382,707	Low
8	<b>HST710239</b> – Other precious metal products	R1,316,110,888	Moderate
9	<b>HST382370</b> – Industrial fatty alcohols	R858,305,825	Moderate
10	<b>HST750210</b> – Nickel, not alloyed	R830,031,754	High (critical mineral for batteries, steel)

Source: Quantec. (2025)

### Key Insights:

- The top 10 exports account for R54.83 billion, representing an overwhelming 96.8% of Johannesburg's total exports to the US.
- The metro's trade is heavily mineral-centric, making it vulnerable to shifts in US strategic mineral policy, clean energy mandates, and industrial reshoring.
- Products like palladium, platinum, rhodium, and nickel are essential to the global clean energy and automotive sectors, thus having long-term export potential, but are also susceptible to geopolitical and trade realignments.

## 6. City of Tshwane's Exports to the United States: Automotive Dominance & Industrial Trade Profile

In 2024, the City of Tshwane exported approximately R32.54 billion worth of goods to the United States, making it one of South Africa's most important metro exporters. Tshwane's exports are heavily concentrated in the automotive sector, supported by globally integrated assembly lines, along with smaller shares in uranium, coal, and industrial chemicals.

### Economic Contribution:

- **Total export current value to the US (Tshwane): R32,538,187,880**
- **Tshwane GVA (current value 2024): R547,814.51 million**
- **% Contribution of US Exports to GVA: 5.94%**

This is one of the highest metro-level export-to-GVA ratios, driven by **strong automotive exports under AGOA**, and deep linkages with US and European vehicle markets.

#### Top 10 Products Exported to the United States from Tshwane (2024)

Rank	HS Code & Description	Export Value (R)	Tariff/Policy Sensitivity
1	<b>HST870323</b> – Passenger vehicles (1500–3000cc)	R26,328,008,913	High (AGOA, emissions, EV transition)
2	<b>HST870332</b> – Passenger vehicles (diesel, 1500–2500cc)	R2,281,750,465	High (clean fuel standards, auto rules)
3	<b>HST870324</b> – Passenger vehicles (engine >3000cc)	R1,345,499,748	High
4	<b>HST284430</b> – Uranium (depleted, incl. thorium compounds)	R404,559,589	High (nuclear regulation, dual-use goods)
5	<b>HST870421</b> – Vehicles for goods (≤5 tonnes)	R272,567,239	Moderate (vehicle trade rules)
6	<b>HST252922</b> – Calcium fluoride (>97%)	R189,183,388	Moderate (chemical & mineral classification)
7	<b>HST260111</b> – Coal (non-agglomerated)	R183,151,876	High (climate regulations, decarbonisation)
8	<b>HST270112</b> – Bituminous coal	R128,351,149	High
9	<b>HST711890</b> – Precious metals (Other)	R107,414,737	Moderate
10	<b>HST843139</b> – Machinery parts (Other)	R97,342,042	Moderate

Source: Quantec. (2025)

#### Key Insights:

- Automotive exports dominate, making up over 90% of Tshwane’s total US-bound exports.
- This reliance on vehicles, particularly internal combustion models, makes Tshwane highly exposed to future shifts in:
  - EV transition policies
  - Carbon border adjustments
  - US local sourcing mandates
- Exports of uranium and coal carry geo-strategic and environmental sensitivities, likely to face regulatory constraints in green trade regimes.



## 7. Metros Most Exposed to US Tariff or Regulatory Shifts

### Tshwane:

Tshwane's export portfolio is heavily concentrated in **internal combustion engine vehicles**, which face high exposure to **US automotive protectionism**, the **EV transition under the Inflation Reduction Act (IRA)**, and potential **carbon-based border adjustments**. Any tightening of US local manufacturing incentives could directly disrupt Tshwane's automotive value chain.

### Johannesburg:

Johannesburg's exports are dominated by **precious metals**, notably **palladium, platinum, and rhodium**, which are essential for US clean tech and catalytic converter production. However, these exports are vulnerable to emerging **critical minerals strategies, sourcing restrictions**, and global **price volatility concerns**, especially amid tightening US-China mineral competition.

### Ekurhuleni:

The metro's strong aerospace and precision engineering sector (jet engines, aircraft parts, electrical components) makes it susceptible to **dual-use technology controls, defence-related export restrictions**, and **US strategic autonomy objectives**, particularly in the context of rising geopolitical tensions.

### EThekweni (Durban):

Durban's exports include **refined sugar, aluminium alloys, chemical intermediates**, and **mechanical parts**. These sectors face **moderate exposure** to tariff hikes, especially under **US agricultural protectionism, steel safeguard measures**, and increasing **regulatory scrutiny on chemical and processed food imports**. Durban's dependence on industrial and processed goods places it at risk if AGOA preferences are withdrawn or if US non-tariff barriers are tightened.

## 8. Conclusion

Among the metros assessed:

**Cape Town** is **least exposed** to immediate US tariffs or regulatory shifts, due to its **diverse export base**, including marine products, diagnostic reagents, and high-value consumer goods, with **low concentration risk** and more **stable trade classifications**.

**Tshwane and Johannesburg** are **most exposed**, given their **high reliance** on sectors facing global restructuring:

- **Tshwane** on traditional vehicle exports (at risk from EV transition and US local content rules).
- **Johannesburg** on strategic metals (subject to critical minerals policy shifts and price monitoring).

**eThekweni (Durban)** faces a **moderate but growing risk**, particularly if the US tightens restrictions on **agro-processing, aluminium, and industrial inputs**, or if AGOA access is disrupted.

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## References

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