National Agricultural Marketing Council

Promoting market access for South African agriculture

# Markets and Economic Research Centre

# Food Price Monitor

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*MEDIA RELEASE*

# *FOOD PRICE MONITOR:*

## *May 2014*

**EXECUTIVE SUMMARY**


The April 2014 Consumer Price Index (CPI) released by Statistics South Africa (Stats SA) showed that the headline CPI was 6.1% between April 2013 and April 2014. The year-on-year food and non-alcoholic beverage price index increase was 7.8% in April 2014. This was the second month in 2014 where food price inflation rate was 6% or above.

In April 2014, the food items showing the largest price differences between urban and rural areas were maize meal (5kg), margarine (500g), rice (2kg) and white sugar (2.5kg) at R3.01, R2.13, R1.62 and R1.06, respectively. This indicates that rural consumers paid more for these food items than urban consumers did. The price of sunflower oil (750ml) and Ceylon/black tea (62.5g) were respectively R 1.39 and R 1.94 more expensive in the urban areas compared to the rural areas.

From April 2013 to April 2014 the cost of the basic food basket increased by about R19 (+4.1%) in nominal terms from R456 to R475 compared to an increase of 3.0% from January 2013 to January 2014 (the previous Food Price Monitor analysis period).

When comparing April 2013 to April 2014, significant price inflation (6% or more) was experienced for many products within the food basket: milk, eggs, margarine, oranges, frozen chicken portions, rice and onions. This could have a negative impact on household food security in South Africa affecting the affordability of selected staple foods (rice) as well as food items making a major contribution to dietary diversity. When comparing the inflation rates for April 2013 versus April 2014, with January 2013 versus January 2014 (i.e. the previous Food Price Monitor analysis period) inflation increased for vegetables, fruit, dairy, eggs, fats/oils and bean products.

For the outlook period, food price inflation is expected to decline. There are a number of factors driving down the rate of increase. In the case of grains and oilseeds, global markets declined by approximately 30% a few months back and South African markets are now following suit. With a potential bumper crop for maize, soybeans and sunflower, these prices are al trading significantly lower than a year ago and further declines in the price of maize can be anticipated. A lower price of maize is required to secure South Africa's position as a competitive exporter of white and yellow maize in the world market.

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## 1. Introduction

The April 2014 Consumer Price Index (CPI) released by Statistics South Africa (Stats SA) showed that the headline CPI was 6.1% between April 2013 and April 2014. The year-on-year food and non-alcoholic beverage price index increase was 7.8% in April 2014. This was the second time in 2014 where the inflation rate was 6% or above. Figure 1 shows trends in year-on-year headline CPI and food and non-alcoholic beverage inflation rates from April 2013 to April 2014.

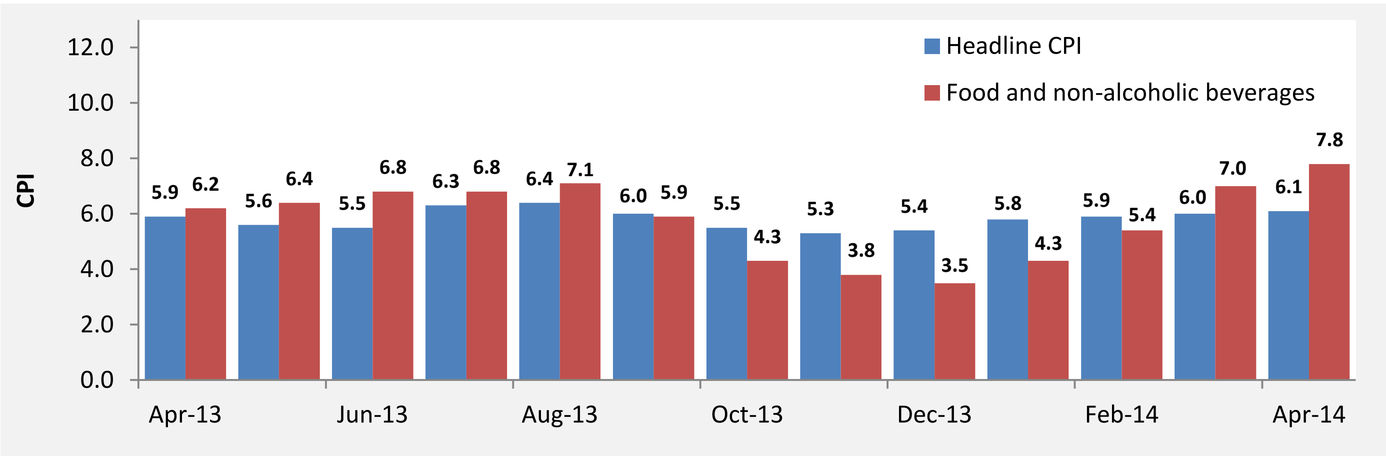


**Figure 1: Headline CPI and food and non-alcoholic beverage CPI for 2013–2014 (year-on-year)**
**Source: Stats SA, 2014**

Presented in Figure 2 are the components of food and non-alcoholic beverage inflation. Some of the components increased as follows: bread and cereals (10.2%), vegetables (9.9%), unprocessed products (9.0%), milk, eggs and cheese (8.8%), fish (8.4%), processed food products (7.4%), other food (7.3%), meat (6.7%), oils and fats (6.2%), sugar, sweets and deserts (5.9%), and fruit (2.4%). On a month-on-month (January 2014 to April 2014) basis, the meat prices increased by 2.0% followed by the unprocessed foods, bread and cereals and milk, eggs and cheese with 1.8% and 1.7% increases respectively. Overall, on a month-on-month basis, all the food groups experienced some increases except for the fruit category.

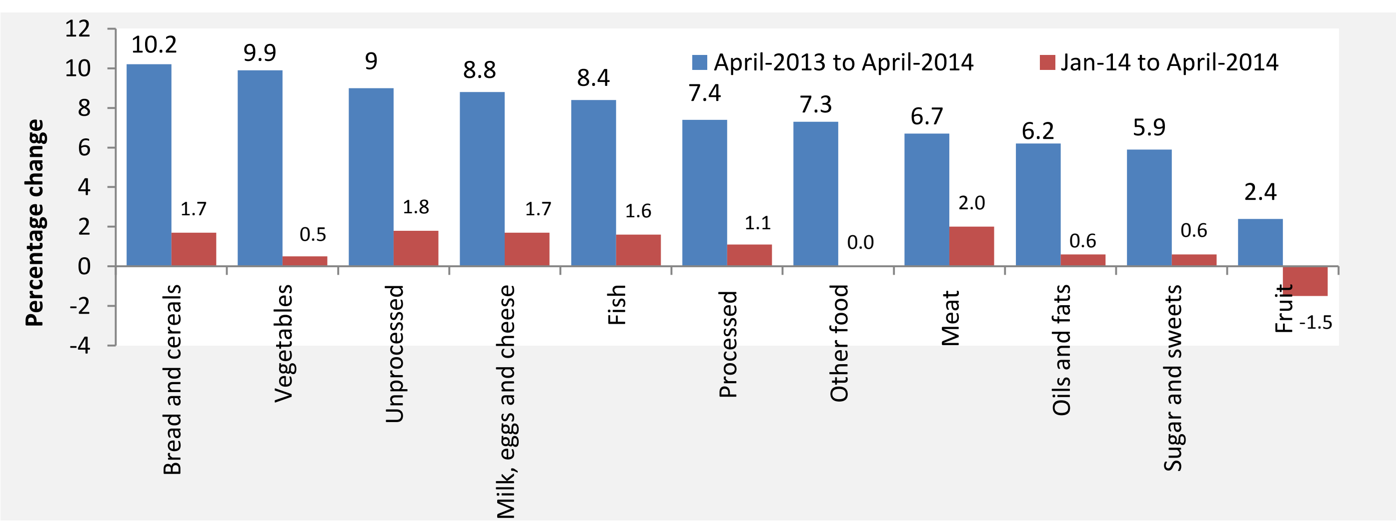


**Figure 2: Year-on-year percentage change for different food categories (April 2013 – April 2014)**
**Source: Stats SA, 2014**

## 2. Overall inflation and food inflation: South Africa and selected countries

Table 1 shows year-on-year April overall inflation and food inflation rates for South Africa and selected countries. Turkey has the highest overall inflation rate for the listed products. Among the African countries, it is Namibia followed by Zambia and South Africa. Among BRIC countries, India leads in overall inflation followed by Russia and Brazil respectively with China having a very low inflation rate. Developed economies have the lowest inflation rates with the USA having an inflation rate of 2%. Turkey has the highest food and non-alcoholic beverage inflation and the highest overall inflation rate. Notably developed countries have the lowest food and non alcoholic beverage inflation rates namely United Kingdom, Unites States and China. Amongst the listed African countries, Botswana has the lowest food inflation rate.

**Table 1: Overall inflation and food inflation (April 2013 – April 2014)**

| Country | Overall inflation (%) | Inflation on food and non-alcoholic beverages (%) |
|---|---|---|
| South Africa | 6.1 | 7.8 |
| Botswana | 4.5 | 3.2 |
| Zambia | 7.8 | 7.8 |
| Turkey | 9.4 | 13.2 |
| Namibia | 5.9 | 8.8 |
| United States | 2.0 | 1.9 |
| United Kingdom | 1.8 | 0.5 |
| Brazil | 6.3 | 6.3 |
| Russia | 7.3 | 8.7 |
| India | 8.6 | 9.7 |
| China | 1.6 | 2.3 |

**Source: Central banks and statistics reporting institutions of these countries, as well as the press**

## 3. Urban and rural food price trends: April 2013–April 2014

Appendix C ranks the food items included in this report in the urban and rural areas, according to the inflation experienced. The food products highlighted in Table C.1 are those with annual inflation rates that exceeded the South African Reserve Bank's (SARB) inflation upper band of 6%. Food items in urban areas with an annual inflation rate higher than 6% were the following: chicken portions-frozen per kg (6.17%), chopped peeled tomatoes (6.61 %), beef t-bone-fresh per kg (7.60%), whole chicken-fresh per kg (7.85%), beef rump steak-fresh per kg (8.46 %), cake flour 2.5kg (8.47 %), pork chops-fresh per kg (8.65 %), picnic ham (8.86%), apples-fresh per kg (9.06%), baby carrots per kg (10.31%), eggs 1.5 dozen (10.47%), peanut butter 410g (10.62%), tomato & onion mix 410g (10.92%), maize meal-special 5kg (11.13%), beef brisket-fresh per kg (12.20%), sunflower oil 750ml (12.69%), sweet potatoes-fresh per kg (14.11%), carrots-fresh per kg (14.26 %), tuna-tinned 170g (14.29 %), soya mince tomato & onion 200g (15.32 %), skimmed milk powder per kg (18.73%), onions-fresh per kg (19.54%), total butter 500g (26.75%) and canned peas 400g (28.18%).

### *A closer look at food price trends*

During the period under review (April 2013–April 2014), the international price of wheat (US No. 2, Hard Red Winter ord. Prot, US Fob Gulf) decreased by 4.62%, yet domestic wheat prices increased by 16.63% and urban consumers paid 3.87% more for a loaf of brown bread (700g) and 4.25% more for a loaf of white bread (700g) during that period. During this same period, local yellow maize prices increased by 13.18%, while international yellow maize prices decreased by 17.18%, super maize meal (5kg) decreased by 4.75% and special maize meal (5kg) increased by 12.67%.

During this period, the retail price of sunflower oil (750ml) increased by 2.82%, yet the April 2014 price of sunflower seed was R4799.42/ton, which was a decrease of 8.13% from April 2013. During this period, the average price of beef cuts increased and beef producer prices experienced an increasing trend. The average producer prices of class A2/A3, Class B2/B3 and C2/C3 beef increased in total by 19.71%, 14.33% and 8.64%, respectively.

In the same period, lamb/mutton meat prices showed an increase of 4.46% and, on average, the mutton/lamb producer prices increased by 3.97%. The price of fresh chicken portions increased by 4.69%, while the price of frozen chicken portions increased by 6.17% year-on-year.

## 4. Comparison between urban and rural prices

This section compares prices of selected food items in the rural and urban areas for April 2014, as indicated in Table 2.

Food items showing the largest price differences in April 2014 were maize meal (5kg), margarine (500g), rice (2kg) and white sugar (2.5kg) at R3.01, R2.13, R1.62 and R1.06, respectively. This indicates that rural consumers paid more for these food items than urban consumers did. On the other hand, the prices of sunflower oil (750ml) and Ceylon/black tea (62.5g) were respectively R1.39 and R1.94 more expensive in the urban areas than the rural areas. The reasons for the higher food prices in the rural areas are discussed in detail in the South African Food Cost Review: 2008, which is available at http://www.namc.co.za.

**Table 2: Comparison between urban and rural food prices (selected food items)**

| Product | Rural Food Prices April 2014 | Urban Food Prices April 2014 | Price difference R/unit |
|---|---|---|---|
| Full Cream Long Life Milk 1 L | 12.01 | 11.21 | 0.8 |
| Loaf of Brown Bread 700 g | 9.23 | 9.39 | -0.16 |
| Loaf of White Bread 700 g | 10.34 | 10.54 | -0.2 |
| Maize Meal 5 kg | 33.38 | 30.37 | 3.01 |
| Margarine 500 g | 19.98 | 17.85 | 2.13 |
| Rice 2 kg | 23.85 | 22.79 | 1.06 |
| Sunflower Oil 750 ml | 16.11 | 17.50 | -1.39 |
| Ceylon/Black Tea 62.5 g | 6.50 | 8.44 | -1.94 |
| White Sugar 2.5 kg | 27.75 | 26.13 | 1.62 |
| **Average** | | | **0.55** |

**Source**: **Stats SA, 2014**

## 5. International food prices

The Food and Agricultural Organization (FAO) of the United Nations publishes its food price index on a monthly basis. The food price index consists of five commodity group price indices, namely, the meat price index, the dairy price index, the cereals price index, the oils price index and the sugar price index. These indices are weighted with the average export shares of each of the groups for 2002 to 2004. In total, 55 commodity quotations, considered by FAO commodity specialists as representing the international prices of the noted food commodities, are included in the overall index. Figure 3 shows the overall food price index and the price indices for the five food categories in real terms.

The FAO Food Price Index declined by 5.4% between April 2013 and April 2014. The decline in the food price index is largely affected by the decline in the prices of dairy, meat, cereals and sugar. On a month-on-month basis the decline was 1.6%.

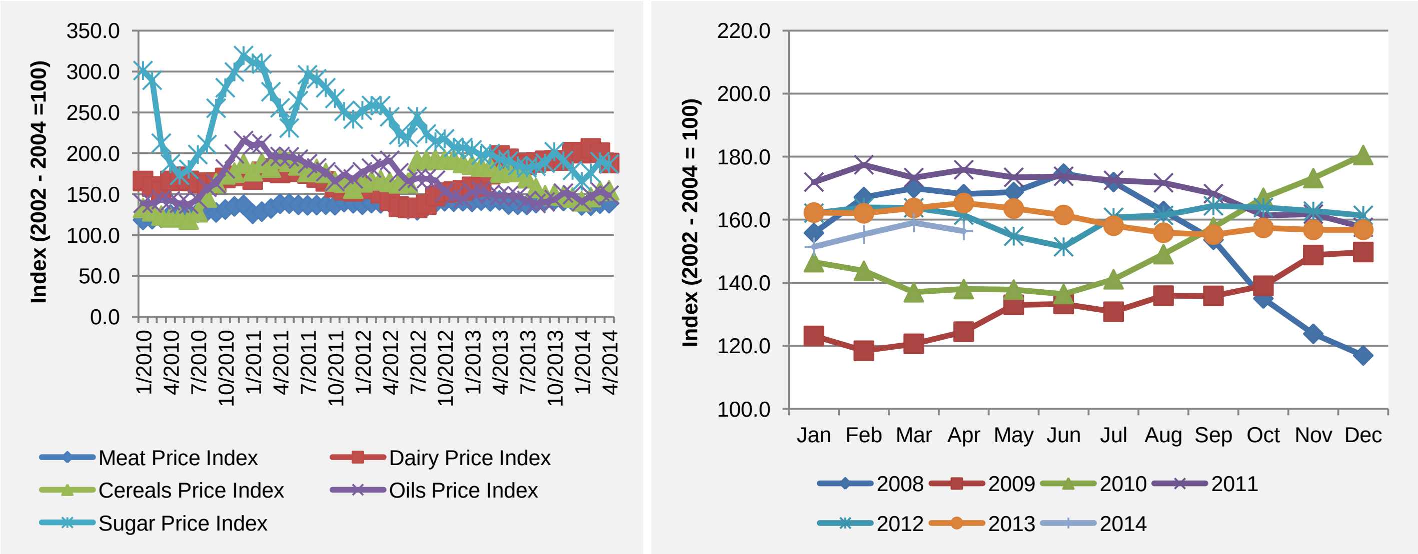


**Figure 3: Price indices for five food categories and the international real food price index**
**Source: FAO, 2014**

Cereal price index increased by 0.5% from March 2014, averaging 154.6 points in April 2014. An annual decrease of 12.1% was seen in cereal price index (April 2013 – April 2014). In April 2014 vegetable oil prices averaged at 148.7 points which increased by 0.56% from April 2013. A decline in vegetable oil index is driven by the palm oil whose values declined due to low import demand especially from the European Union. Soybean oil prices increased due to tightness global soybean exporters.

Global dairy prices fell by 4.7% between April 2013 and April 2014, averaging 188.0 points in April 2014. On a month-on-month basis, the dairy price index has decreased by 6.3%. Dairy product prices have been affected by reduced purchases from China and Russia who are main importers of powder milk, skimmed milk and butter. The dairy season in the Northern hemisphere has started which implies increases in exports and subsequently declining prices.

Meat price index increased by 0.4% from March 2014 to April 2014 averaging 138.9 points in April 2014. On an annual basis, (April 2013 - April 2014), the meat price index declined by 2.4%. The increase was attributed to increased pig meat prices. Bovine meat has remained high due to unfavourable climatic condition in Australia and the United States. Poultry and ovine meat remained relatively stable.

Global sugar price index averaged 186.8 points in April 2014 a decline of 1.6% from March 2014. Year-on-year, the sugar price index declined by 3.0%. The decline was attributed to large sugar supply by main producers, namely Thailand, India and Australia.

## 6. Estimated impact of food inflation on consumers

The purpose of this section is to illustrate the impact of food inflation on consumers. The analysis presented in the first part of this section is based on the cost of a basic food basket[1] (as compiled by the Food Price Monitoring Committee in 2003), based on monthly average food price data for the period April 2013 to April 2014. During this period, the cost of the basic food basket increased by about R19 (+4.1%) in nominal terms from R456 to R475, compared to a lower increase of 3.0% from January 2013 to January 2014 (the previous Food Price Monitor analysis period).

The cost of this food basket, expressed as a share of the average monthly income[2] of the poorest 30% of the population, increased from 42.6% in April 2013 to 44.4% in April 2014. The cost of the food basket, expressed as a share of the average monthly income of the wealthiest 30% of the population, increased from 1.7% to 1.8% (Figure 4).

[1] Composition of food basket: Apples ( 1kg), Bananas (1kg), Beef chuck (1kg), Brick margarine (500g), Butter beans - tinned (410g), Cabbage (1kg), Ceylon/black tea (62.5g), Chicken portions fresh (1kg), Chicken portions frozen (1kg), Eggs (1.5 dozen), Canned fish (excl tuna) (425g), Full cream milk long life (1ℓ), Instant coffee (750g), Loaf of brown bread (700g), Loaf of white bread (700g), Maize meal super (5kg), Onions (1kg), Oranges (1kg), Peanut butter (400g), Potatoes (1kg), Rice (2kg), Sunflower oil (750mℓ), Tomatoes (1kg). *Due to data limitations butter beans was temporarily omitted from this analysis.*

[2] The cost of the typical food basket was expressed as a share of estimated average monthly income of Income Deciles 1 to 3, the poorest 30% of the population, as calculated from the STATSSA survey: 'Income & Expenditure of households 2010/2011' *(calculations excludes imputed rent on owned dwelling)*

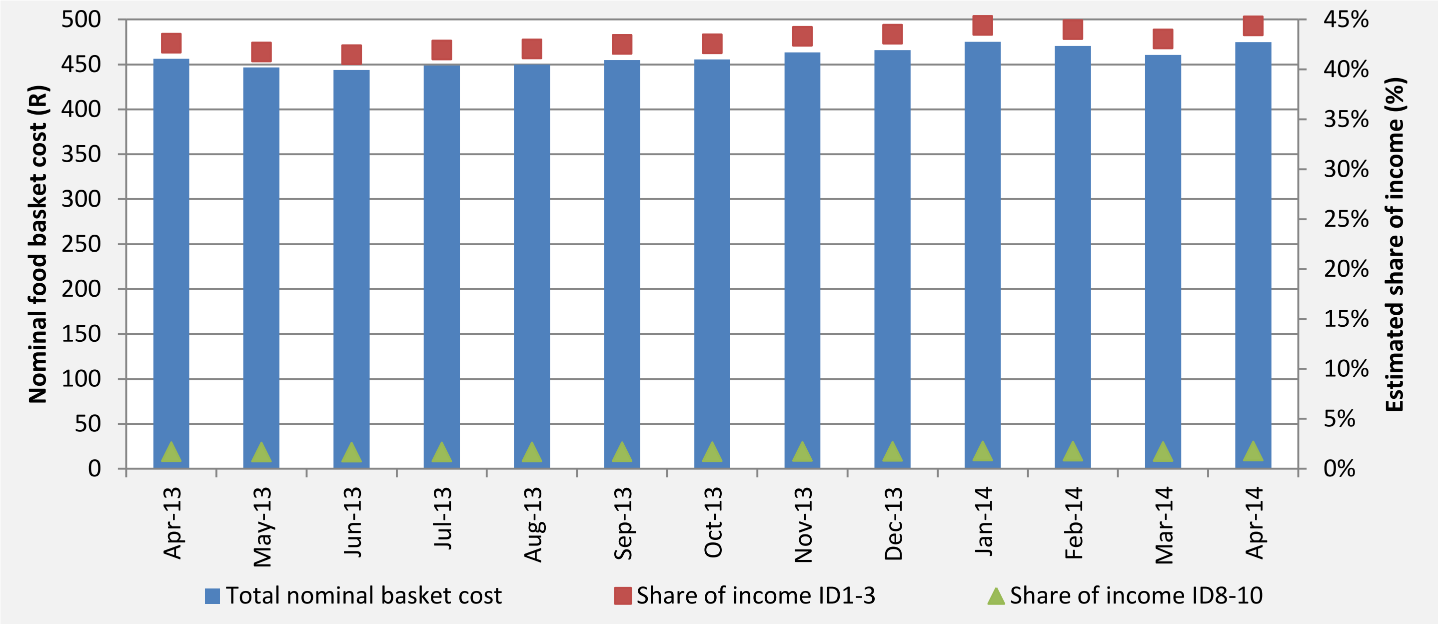


**Figure 4: The monthly cost of a typical consumer food basket for the period April 2013 to April 2014, expressed in nominal terms and as a share of the average income of the poorest 30% of households (Income Deciles [ID] 1 to 3) and the wealthiest 30% of households (ID 8 to 10)**

To further explore the impact of inflation on consumers, Figure 5 presents an illustration of the average annual nominal cost of specific food groups within the basic food basket, for the period April 2013 to April 2014. As could be expected, Figure 5 illustrates the dominance of animal protein foods, as well as breads and cereals within the cost of the basic food basket. Comparing April 2013 to April 2014 prices, all food categories experienced inflation. The various food groups within this food basket are discussed in more detail in Table 3 below.

Thus, when comparing April 2013 to April 2014, significant price inflation (6% or more) was experienced for many products within the food basket, such as milk, eggs, margarine, oranges, frozen chicken portions, rice and onions. This could have a negative impact on household food security in South Africa affecting the affordability of selected staple foods such as rice, as well as food items making a major contribution to dietary diversity. When comparing the inflation rates for April 2013 versus April 2014, with January 2013 versus January 2014 (the previous Food Price Monitor analysis period), inflation increased for vegetables, fruit, dairy, eggs, fats/oils and bean products.

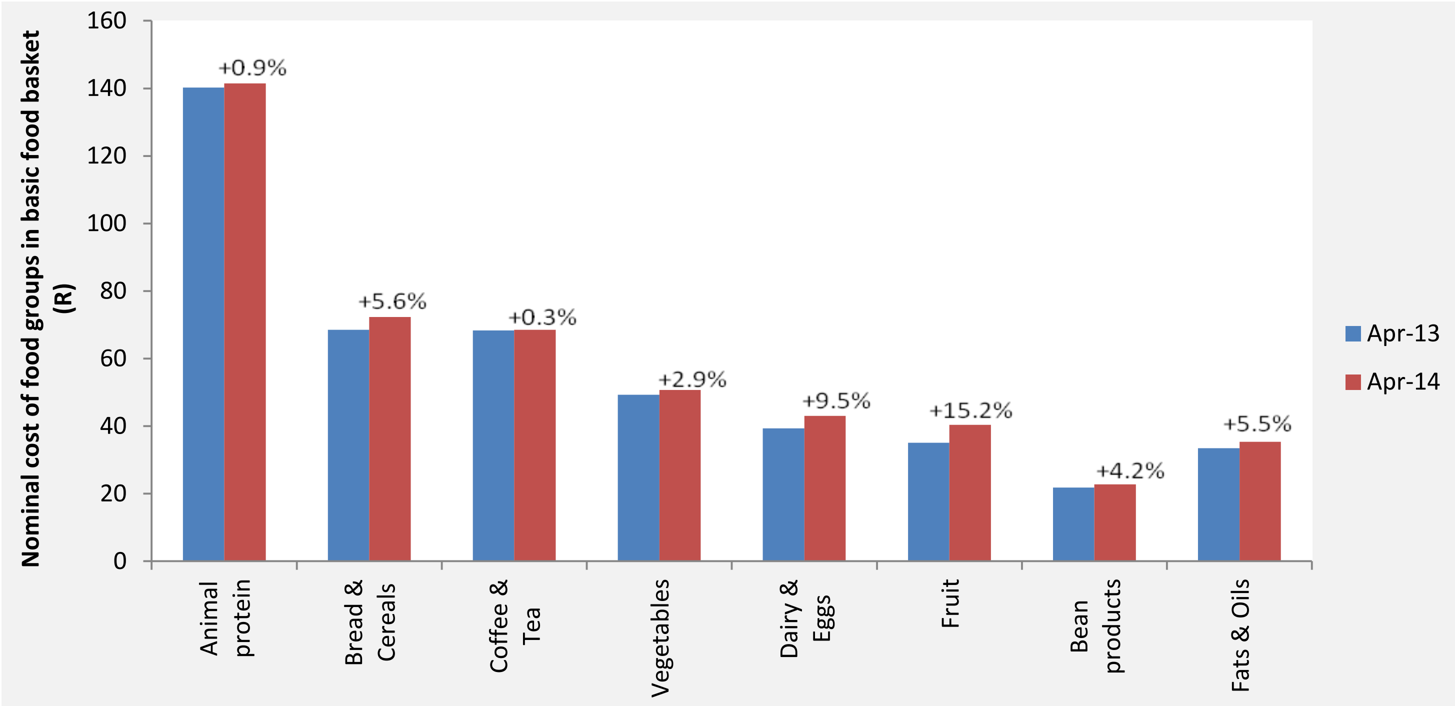


**Figure 5: Nominal monthly cost of specific groups in the basic food basket, comparing April 2013 and April 2014**
**Source: Stats SA, 2014 and own calculations**

**Table 3: Overview of foods contributing to inflation in the basic food basket (April 2013 to April 2014)**

| Food group: | Overall inflation rate: | | Major contributors to inflation in this category: | Minor contributors to inflation in this category: | Non-contributors to inflation in this category: | Comments: |
|---|---|---|---|---|---|---|
| | April 2013 to April 2014 | January 2013 to January 2014* | | | | |
| Animal Protein | +0.9 % | -0.2 % | Chicken portions frozen (+6.2 %)<br>Chicken portions fresh (+4.7 %)<br>Canned fish (+3.1 %) | None | Beef chuck (-4.8 %) | Significant inflation on chicken and canned fish. |
| Bread and cereals | +5.6 % | +13.1 % | Rice (+8.5 %)<br>Brown bread (+3.9 %)<br>White bread (+4.3 %) | None | None | Significant inflation on rice. Some inflation (4 % to 5 %) on bread. |
| Vegetables | +2.9 % | +2.2 % | Potatoes (+4.3 %)<br>Onions (+19.5 %) | Tomatoes (+2.4 %) | Cabbage (-10.2 %) | Potatoes and onions experienced significant inflation. |
| Fruit | +15.2 % | -5.5 % | Apples (+9.1 %) | None | Bananas (-2.0 %) | Some inflation on apples. |
| Dairy | +7.1 % | +6.2 % | Full cream long life milk (+7.1 %) | None | None | High inflation on the price of long life milk and on the price of eggs. |
| Eggs | +10.5 % | +5.1 % | Eggs (+10.5 %) | None | None | |
| Fats and oils | +5.5 % | -1.2 % | Margarine (+8.2 %) | Sunflower oil (+2.8 %) | None | High inflation on margarine. |
| Bean products | +4.2 % | +1.0 % | Peanut butter (+4.2 %) | None | None | Some inflation on peanut butter. |
| Coffee and tea | +0.3 % | +6.9 % | Ceylon/black tea (+5.5 %) | None | Coffee (-0.4 %) | Some inflation on coffee. |

**Source: Stats SA, 2014 and own calculations**

The impact of inflation on very poor consumers is further explored below, based on the typical portion sizes of the five most widely consumed food items in South Africa represented by maize porridge, brown bread, sugar, tea and full cream milk (National Food

Consumption Survey - Steyn & Labadarios, 2000[3]; Oldewage-Theron et al., 2005[4]). Figure 6 illustrates the estimated portion costs for these foods, calculated from monthly food price data for April 2013 and April 2014. Similar to other Food Price Monitor analysis periods, the significant cost contribution of maize meal and bread to the typical basic daily food selection for poor consumers is emphasised by the results in Figure 6. Furthermore, despite the relatively low actual food weight contribution of bread to this 'food plate', the bread component costs significantly more than the maize porridge component (about 64% more in this case for April 2014). When comparing the costs associated with the typical portion sizes of very poor consumers for the five most widely consumed food items in South Africa, based on April 2014 versus April 2013 prices, the results in Figure 6 indicated inflation of about 2.5% (from R4.37 to R4.48 for the selection of portions). Significant inflation on all products, except maize meal, contributed most to the inflation observed on this 'food plate'. Even though the entire food basket experienced inflation of 4.1% when comparing April 2014 with April 2013, the typical basic daily food selection for poor consumers revealed slightly less inflation (2.5%). This observation is mainly driven by the inflation on brown bread being offset by deflation on maize meal for this analysis period.

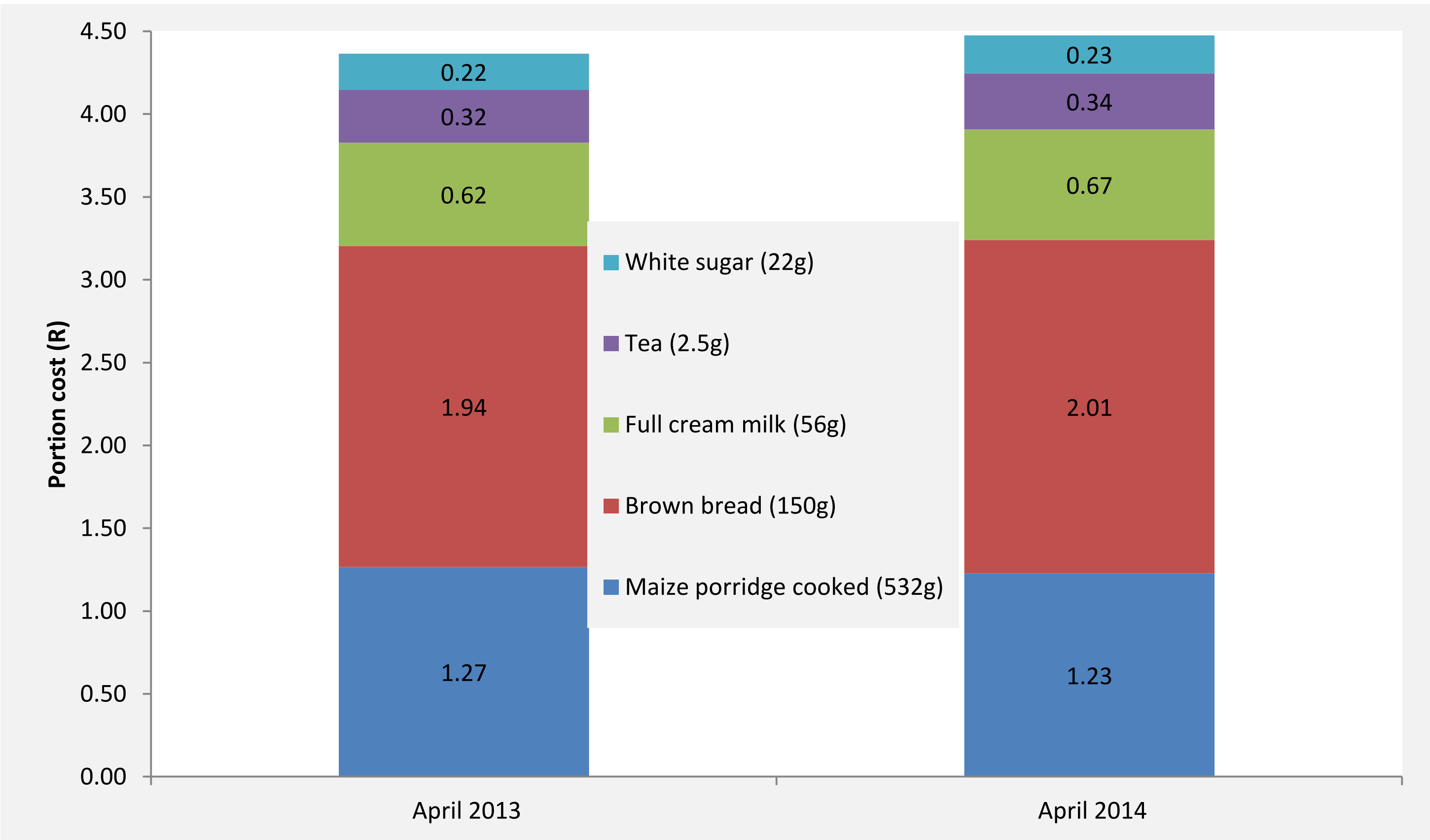


**Figure 6: Average nominal cost for the typical portions of the five food items most widely consumed by very poor consumers in South Africa (April 2013 and April 2014)**

[3] Steyn NP, Labadarios D. *National Food Consumption Survey: Children aged 1–9 years, South Africa, 1999.* Cape Town: The Department of Health Directorate Nutrition, 2000

[4] Oldewage-theron W, Dicks E, Napier C, *et al.* Situation analysis of an informal settlement in the Vaal Triangle. *Development Southern Africa* 2005 ; 22 (1): 13-26

## 7. June 2014 – August 2014 outlook

The annual food inflation rate increased to 7.8 percent in April 2014. This increase is in line with the expectation of the previous outlook report. In fact, when taking a closer look at the main drivers behind food inflation, it is the bread and cereals category that rose by 10.2 percent year-on-year. The anticipated squeeze in the maize market unfolded in March with unprecedented short term increases in the future prices of white and yellow maize even above import parity levels as stock levels dwindled. These commodity price spikes were transmitted to the maize meal prices, which also peaked in March and have entered a downward. Similarly, meat prices have also increased significantly over this period of time with fewer carcasses offered in the market compared to last year where the seasonal drought led to the slaughtering of a lot more animals.

For the outlook period, food price inflation is expected to decline. There are a number of factors driving down the rate of increase. In the case of grains and oilseeds, global markets declined by approximately 30% a few months back and South African markets are now following suit. With a potential bumper crop for maize, soybeans and sunflower, these prices are al trading significantly lower than a year ago and further declines in the price of maize can be anticipated. A lower price of maize is required to secure South Africa's position as a competitiveness exporter of white and yellow maize in the world market. The US stock levels will be replenished significantly in the current season and therefore, world prices could decline even further. Wheat prices will also potentially decline under the assumption of a periodic appreciation of the exchange rate.

In the winter months the demand for beef normally declines and prices tend to trade softer. However, one has to remember that prices are coming from a relatively low base with prices trading as low as R27/kg for A2/A3 carcasses this time last year. With carcass prices currently at R33/kg, prices can potentially trade softer, yet year-on-year inflation will remain high and a solid driver of the overall food inflation rate.

Fruit and vegetable prices have also stabilized and are expected to trade sideways over the outlook period. A relatively stable exchange rate implies that the export parity prices will remain constant for the time being.

## APPENDIX A: DATA ON URBAN FOOD PRICE TRENDS

### Table A.1: Wheat products

| Wheat products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Loaf of brown bread 700g | 9.04 | 9.47 | 9.39 | -0.84% | 3.87% |
| Loaf of white bread 700g | 10.11 | 10.49 | 10.54 | 0.48% | 4.25% |
| Cake flour 2.5kg | 20.43 | 21.97 | 22.60 | 2.87% | 10.62% |
| Spaghetti 500g | 9.92 | 10.06 | 10.11 | 0.50% | 1.92% |
| **Average** | | | | **0.75%** | **5.17%** |
| **Wheat (R/ton)** | **3367.75** | **3740.50** | **3927.87** | **5.01%** | **16.63%** |

*Data from AC Nielsen

### Table A.2: Maize products

| Maize products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Maize special 5kg* | 26.95 | 29.17 | 30.37 | 4.12% | 12.69% |
| Maize super 5kg* | 29.76 | 32.08 | 28.85 | -10.05% | -3.05% |
| **Average** | | | | **-2.97%** | **4.82%** |
| **White Maize (R/ton)** | **2165.81** | **3159.91** | **2640.95** | **-16.42%** | **21.94%** |

*Data from AC Nielsen

### Table A.3: Sunflower products

| Sunflower products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Sunflower oil 750ml | 17.02 | 17.37 | 17.50 | 0.75% | 2.82% |
| Medium fat spread 1kg tub* | 23.24 | 21.52 | 22.97 | 6.74% | -1.17% |
| Brick margarine 500g | 16.49 | 17.62 | 17.85 | 1.31% | 8.25% |
| **Average** | | | | **2.93%** | **3.30%** |
| **Sunflower (R/ton)** | **5223.94** | **5970.05** | **4799.42** | **-19.61%** | **-8.13%** |

*Data from AC Nielsen

### Table A.4: Processed vegetables

| Processed vegetables | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Chopped peeled tomato 410g* | 12.58 | 12.57 | 13.41 | 6.68% | 6.61% |
| Tomato & onion mix 410g* | 10.19 | 9.93 | 11.30 | 13.79% | 10.92% |
| Canned peas 410g* | 9.46 | 9.30 | 12.13 | 30.47% | 28.18% |
| Baby carrots 1kg* | 35.59 | 37.15 | 39.26 | 5.67% | 10.31% |
| Average | | | | **14.15%** | **14.00%** |

*Data from AC Nielsen

### Table A.5: Fresh vegetables

| Fresh vegetables | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Carrots – fresh per kg | 13.39 | 14.29 | 15.30 | 7.07% | 14.26% |
| Onions – fresh per kg | 9.52 | 9.37 | 11.38 | 21.45% | 19.54% |
| Potatoes – fresh per kg | 9.61 | 10.68 | 10.02 | -6.18% | 4.27% |
| Tomatoes – fresh per kg | 17.81 | 17.80 | 18.24 | 2.47% | 2.41% |
| Sweet potatoes – fresh per kg | 14.10 | 17.07 | 18.07 | 5.86% | 28.16% |
| Cabbages – fresh per kg | 12.38 | 11.33 | 11.12 | -1.85% | -10.18% |
| Lettuces – fresh per kg | 44.08 | 34.42 | 40.03 | 16.30% | -9.19% |
| Pumpkins – fresh per kg | 14.61 | 15.91 | 12.96 | -18.54% | -11.29% |
| Cauliflowers – fresh per kg | 36.48 | 38.08 | 37.96 | -0.32% | 4.06% |
| **Average** | | | | **2.92%** | **4.67%** |

### Table A.6: Processed meat

| Processed meat | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Meatballs in gravy 400g* | 16.68 | 16.83 | 17.27 | 2.62% | 3.55% |
| Picnic ham 300g* | 31.53 | 30.58 | 34.32 | 12.23% | 8.86% |
| Polony per kg | 30.06 | 33.64 | 31.62 | -6.00% | 5.19% |
| **Average** | | | | **2.95%** | **5.87%** |

*Data from AC Nielsen

### Table A.7: Unprocessed meat

| Unprocessed meat | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Pork Chops – Fresh per kg | 58.50 | 63.61 | 63.56 | -0.08% | 8.65% |
| Lamb – Fresh per kg | 97.63 | 103.62 | 101.98 | -1.58% | 4.46% |
| Beef Brisket – Fresh per kg | 55.82 | 59.17 | 62.63 | 5.85% | 12.20% |
| Beef Chuck – Fresh per kg | 57.36 | 60.50 | 54.58 | -9.79% | -4.85% |
| Beef Mince – Fresh per kg | 61.37 | 62.84 | 63.24 | 0.64% | 3.05% |
| Beef Rump Steak – Fresh per kg | 96.38 | 96.80 | 104.53 | 7.99% | 8.46% |
| Beef T-Bone – Fresh per kg | 78.60 | 77.35 | 84.57 | 9.33% | 7.60% |
| Whole Chicken – Fresh per kg | 34.53 | 36.20 | 37.24 | 2.87% | 7.85% |
| Chicken Portions – Fresh per kg | 44.75 | 45.97 | 46.85 | 1.91% | 4.69% |
| **Average** | | | | **1.90%** | **5.79%** |

### Table A.8: Dairy products

| Dairy product | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Fresh milk full-cream 1L sachet* | 7.57 | 7.84 | 7.31 | -6.83% | -3.47% |
| Fresh milk full-cream 2L* | 18.63 | 18.59 | 18.16 | -2.30% | -2.55% |
| Fresh milk low fat 1L sachet* | 8.06 | 8.14 | 7.67 | -5.86% | -4.84% |
| Fresh milk low fat 2L* | 19.72 | 19.51 | 18.91 | -3.08% | -4.11% |
| Skimmed powder milk 1kg* | 73.32 | 78.23 | 87.05 | 11.28% | 18.73% |
| Total butter 500 g* | 30.83 | 33.61 | 39.07 | 16.25% | 26.75% |
| Cheddar cheese per kg | 102.68 | 103.26 | 105.89 | 2.55% | 3.13% |
| **Average** | | | | **1.71%** | **4.80%** |

*Data from AC Nielsen

### Table A.9: Fruits

| Fruits | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Apples – fresh per kg | 13.80 | 15.75 | 15.05 | -4.44% | 9.06% |
| Bananas – fresh per kg | 11.60 | 11.12 | 11.37 | 2.25% | -1.98% |
| **Average** | | | | **-1.10%** | **3.54%** |

### Table A.10: Fish products

| Fishes – tinned | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| Fish (excl tuna) – tinned 155g | 7.40 | 7.51 | 7.56 | 0.67% | 2.16% |
| Fish (excl tuna) – tinned 425g | 13.29 | 13.46 | 13.70 | 1.78% | 3.09% |
| Tuna – tinned 170g | 13.79 | 15.73 | 15.76 | 0.19% | 14.29% |
| **Average** | | | | **0.88%** | **6.51%** |

### Table A.11: Other products

| Other products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | Apr-13 | Jan-14 | Apr-14 | Jan-14 to April-14 | April-13 to April-14 |
| King Korn 1kg* | 14.27 | 15.22 | 11.19 | -26.48% | -21.59% |
| White Sugar 2.5kg | 25.26 | 25.26 | 26.13 | 3.44% | 3.44% |
| Rice 2kg | 21.01 | 22.85 | 22.79 | -0.26% | 8.47% |
| Ricoffy Reg 750g* | 58.52 | 66.27 | 67.49 | 1.85% | 15.32% |
| Ceylon/Black Tea 62.5g | 8.00 | 8.47 | 8.44 | -0.35% | 5.50% |
| Imana Soya Mince Tomato & Onion 200g* | 9.50 | 10.01 | 9.71 | -3.03% | 2.22% |
| Eggs 1.5 dozen | 28.57 | 30.07 | 31.56 | 4.96% | 10.47% |
| **Average** | | | | **-2.84%** | **3.40%** |

*Data from AC Nielsen

# APPENDIX B: DATA ON RURAL FOOD PRICE TRENDS

### Table B.1: Wheat products

| Wheat Products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Loaf of brown bread 600g | 7.17 | 7.41 | 7.95 | 10.89% | 7.24% |
| Loaf of brown bread 700g | 8.02 | 8.95 | 9.23 | 15.11% | 3.10% |
| Loaf of white bread 600g | 8.70 | 9.06 | 8.61 | -1.08% | -5.01% |
| Loaf of white bread 700g | 9.28 | 9.30 | 10.34 | 11.43% | 11.20% |
| **Average** | | | | **9.09%** | **4.13%** |

### Table B.2: Maize products

| Maize Products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Maize meal 12.5kg | 67.20 | 54.35 | 63.23 | -5.90% | 16.36% |
| Maize meal 1kg | 8.16 | 7.39 | 7.94 | -2.77% | 7.31% |
| Maize meal 2.5kg | 16.83 | 16.70 | 18.11 | 7.63% | 8.44% |
| Maize meal 5kg | 31.13 | 31.24 | 33.38 | 7.23% | 6.84% |
| **Average** | | | | **1.55%** | **9.74%** |

### Table B.3: Sunflower products

| Sunflower Products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Sunflower Oil 2L | 33.68 | 35.29 | 37.72 | 12.01% | 6.91% |
| Sunflower Oil 500ml | 11.69 | 12.15 | 12.38 | 5.96% | 1.96% |
| Sunflower Oil 750ml | 15.60 | 15.55 | 16.11 | 3.28% | 3.58% |
| Margarine 125g | 7.78 | 7.52 | 7.67 | -1.36% | 2.08% |
| Margarine 250g | 11.18 | 11.95 | 11.98 | 7.17% | 0.25% |
| Margarine 500g | 25.54 | 20.41 | 19.98 | -21.77% | -2.10% |
| **Average** | | | | **0.88%** | **2.11%** |

### Table B.4: Dairy products

| Dairy Products | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Full-cream long-life milk 1L | 10.61 | 11.28 | 12.01 | 13.16% | 6.49% |
| Full-cream long-life milk 500ml | 7.38 | 7.55 | 7.62 | 3.21% | 0.82% |
| **Average** | | | 12.01 | **8.19%** | **3.66%** |

### Table B.5: Tea and coffee

| Tea and coffee | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Instant coffee 100g | 14.04 | 13.33 | 14.33 | 2.07% | 7.50% |
| Instant coffee 250g | 27.75 | 25.16 | 24.00 | -13.52% | -4.61% |
| Ceylon/black tea 250g | 22.00 | 22.52 | 23.33 | 6.05% | 3.60% |
| Ceylon/black tea 62.5g | 6.50 | 8.75 | 7.00 | 7.69% | -20.01% |
| **Average** | | | | 0.57% | -3.38% |

### Table B.6: Beans

| Beans | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Beans 1kg | 22.35 | 31.75 | 31.75 | 42.07% | 0.00% |
| Beans 500g | 13.32 | 11.16 | 11.33 | -14.92% | 1.49% |
| **Average** | | | | **13.57%** | **0.75%** |

### Table B.7: White sugar

| Sugar | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| White sugar 1kg | 12.58 | 12.03 | 13.74 | 14.21% | 9.21% |
| White sugar 2.5kg | 27.66 | 26.24 | 27.75 | 5.75% | 0.31% |
| White sugar 500g | 6.54 | 6.64 | 9.39 | 41.36% | 43.49% |
| **Average** | | | | **20.44%** | **17.67%** |

### Table B.8: Rice

| Rice | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Rice 1kg | 14.03 | 13.95 | 14.18 | 1.01% | 1.62% |
| Rice 2kg | 23.62 | 23.49 | 23.85 | 1.00% | 1.54% |
| Rice 500g | 7.58 | 7.36 | 7.50 | -1.06% | 1.91% |
| **Average** | | | | **0.32%** | **1.69%** |

### Table B.9: Peanut butter

| Peanut Butter | Price level | | | Percentage change | |
|---|---|---|---|---|---|
| | April-13 | Jan-14 | April-14 | April-13 to April-14 | Jan-14 to April-14 |
| Peanut butter 270g | 18.48 | 17.83 | 18.15 | -1.80% | 1.80% |
| Peanut butter 400g | 23.19 | 24.02 | 24.15 | 4.14% | 0.55% |
| **Average** | | | | **1.17%** | **1.17%** |

# APPENDIX C: SUMMARY OF INFLATION FOR SELECTED FOOD ITEMS BETWEEN APRIL 2013 AND APRIL 2014

**Table C.1: Food items in the urban areas ranked according to price changes (April 2013 to April 2014)**

| Grain and grain products | % | Meat and meat products and dairy and dairy products | % | Fresh and processed fruits and vegetables | % |
|---|---|---|---|---|---|
| Loaf Of White Bread 700 g | -21.59% | Beef Chuck - Fresh per kg | -4.85% | Pumpkin - Fresh per kg | -11.29% |
| White Sugar 2.5kg | -10.18% | Fresh Milk Low Fat 1Lt Sachet* | -4.84% | Cabbage - Fresh per kg | -10.18% |
| Medium Fat Spread 1kg Tub* | -3.05% | Fresh Milk Low Fat 2Lt* | -4.11% | Lettuce - Fresh per kg | -9.19% |
| Coffee Reg 750g* | 1.92% | Fresh Milk Full Cream 1Lt Sachet* | -3.47% | Bananas - Fresh per kg | -1.98% |
| Maize Special 5kg* | 2.22% | Fresh Milk Full Cream 2Lt* | -2.55% | Tomatoes - Fresh per kg | 2.41% |
| Maize Super 5kg* | 2.82% | Fish (Excl Tuna) - Tinned 155g | 2.16% | Cauliflower - Fresh per kg | 4.06% |
| Ceylon/Black Tea 62.5g | 3.44% | Beef Mince - Fresh per kg | 3.05% | Potatoes Bag 10 kg | 4.27% |
| Rice 2kg | 3.87% | Fish (Excl Tuna) - Tinned 425g | 3.09% | Chopped Peeled Tomato 410g* | 6.61% |
| Spaghetti 500 g | 3.88% | Cheddar Cheese per kg | 3.13% | Apples - Fresh per kg | 9.06% |
| Loaf Of Brown Bread 700 g | 4.25% | Bull Brand Meatballs in Gravy 400g* | 3.55% | Baby Carrots 1kg* | 10.31% |
| Cake Flour 2.5 kg | 8.47% | Lamb - Fresh per kg | 4.46% | Tomato & Onion Mix 410g* | 10.92% |
| Peanut Butter 410g | 10.62% | Chicken Portions - Fresh per kg | 4.69% | Sweet Potatoes - Fresh per kg | 14.11% |
| Maize Special 5kg* | 11.13% | Polony per kg | 5.19% | Carrots - Fresh per kg | 14.26% |
| Sunflower Oil 750ml | 12.69% | Chicken Portions - Frozen per kg | 6.17% | Onions -Fresh per kg | 19.54% |
| Soya Mince Tomato & Onion 200g* | 15.32% | Beef T-Bone - Fresh per kg | 7.60% | Canned Peas 410g* | 28.18% |
| Brick Margarine 500g | 87.19% | Whole Chicken - Fresh per kg | 7.85% | | |
| | | Beef Rump Steak -Fresh per kg | 8.46% | | |
| | | Pork Chops - Fresh per kg | 8.65% | | |
| | | Enterprise Picnic Ham 300g* | 8.86% | | |
| | | Eggs 1.5 dozen | 10.47% | | |
| | | Beef Brisket - Fresh per kg | 12.20% | | |
| | | Tuna - Tinned 170g | 14.29% | | |
| | | Skimmed Powder Milk 1kg* | 18.73% | | |
| | | Total Butter 500g* | 26.75% | | |

* Data from AC Nielsen

** Food items highlighted in the table above experienced price increases above the South African Reserve Bank's (SARB) inflation target of 6%

**Table C.2: Food items in the rural areas ranked according to price changes (April 2013 to April 2014)**

| Grain and grain products | % | Other products | % |
|---|---|---|---|
| Margarine 500g | -21.77 | Beans 500g | -14.92 |
| Maize Meal 12.5kg | -5.90 | Instant Coffee 250g | -13.52 |
| Maize Meal 1kg | -2.77 | Peanut Butter 270g | -1.80 |
| Margarine 125g | -1.36 | Instant Coffee 100g | 2.07 |
| Loaf of White Bread 600g | -1.08 | Full Cream Long Life Milk 500ml | 3.21 |
| Rice 500g | -1.06 | Fish (Excl. Tuna) - Tinned 425g | 3.70 |
| Samp 2.5kg | 0.00 | Peanut Butter 400g | 4.14 |
| Rice 2kg | 1.00 | White Sugar 2.5kg | 5.13 |
| Rice 1kg | 1.01 | Tagless Tea Bags 250g | 6.05 |
| Sunflower Oil 750ml | 3.28 | Tagless Tea Bags 62.5g | 7.69 |
| Samp 1kg | 5.88 | White Sugar 1kg | 9.18 |
| Sunflower Oil 500ml | 5.96 | Fish (Excl. Tuna) - Tinned 155g | 10.27 |
| Margarine 250g | 7.17 | Full Cream Long Life Milk 1L | 13.16 |
| Maize Meal 5kg | 7.23 | | |
| Maize Meal 2.5kg | 7.63 | | |
| Loaf of Brown Bread 600g | 10.89 | | |
| Loaf of White Bread 700g | 11.43 | | |
| Sunflower Oil 2L | 12.01 | | |
| Loaf of Brown Bread 700g | 15.11 | | |

* Food items highlighted in the table above experienced price increases above the South African Reserve Bank's (SARB) inflation target of 6%

# APPENDIX D: COMMODITY AND PRODUCT PRICE TRENDS

*D.1 Wheat price trends*

Between April 2013 and April 2014

International wheat price ↑4.62%

Domestic price of wheat ↑16.63%

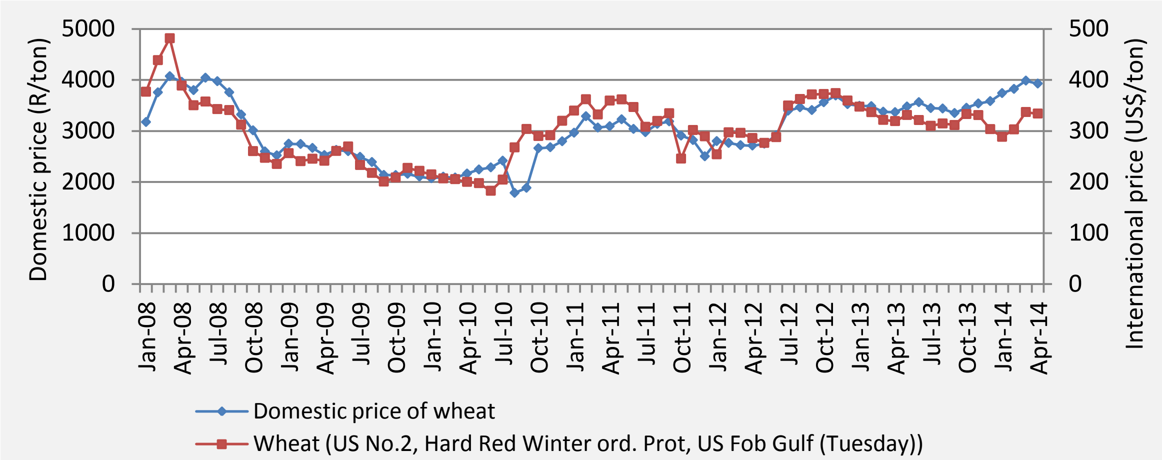


**Figure D.1: Domestic market price of wheat against global market price**
**Source: FAO and SAFEX**

Domestic wheat price followed the import parity price of wheat closely, because SA is a net importer of wheat.

Between April 2013 and April 2014:

Wheat import parity price ↑ 20.59%

Wheat export parity price ↑18.21%

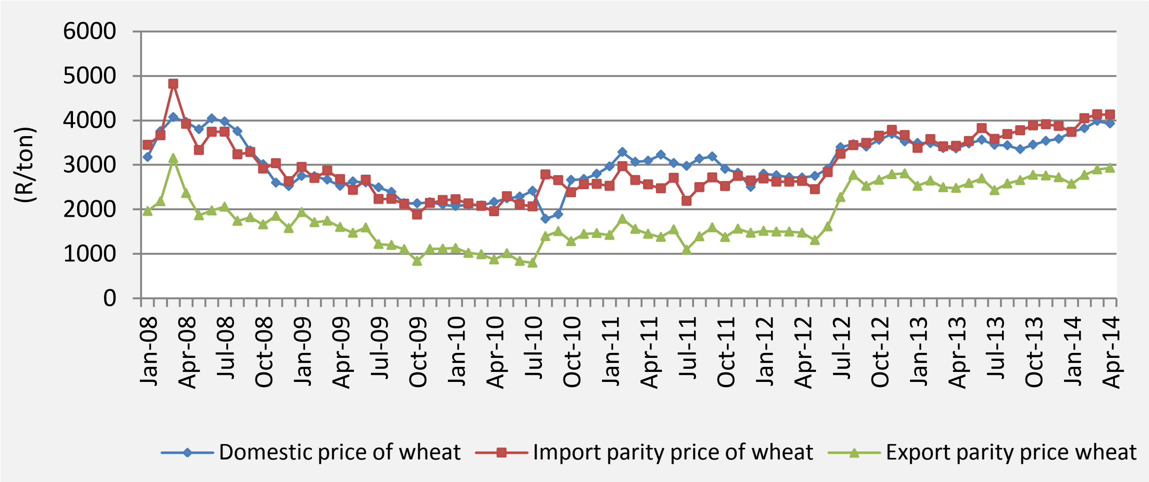


**Figure D.2: Import parity, export parity and domestic prices of wheat**
**Source: SAGIS and SAFEX**

Between April 2013 and April 2014:

Domestic wheat price
↑16.63%

Brown bread price
↑ 3.87%

White bread price
↑ 4.25%

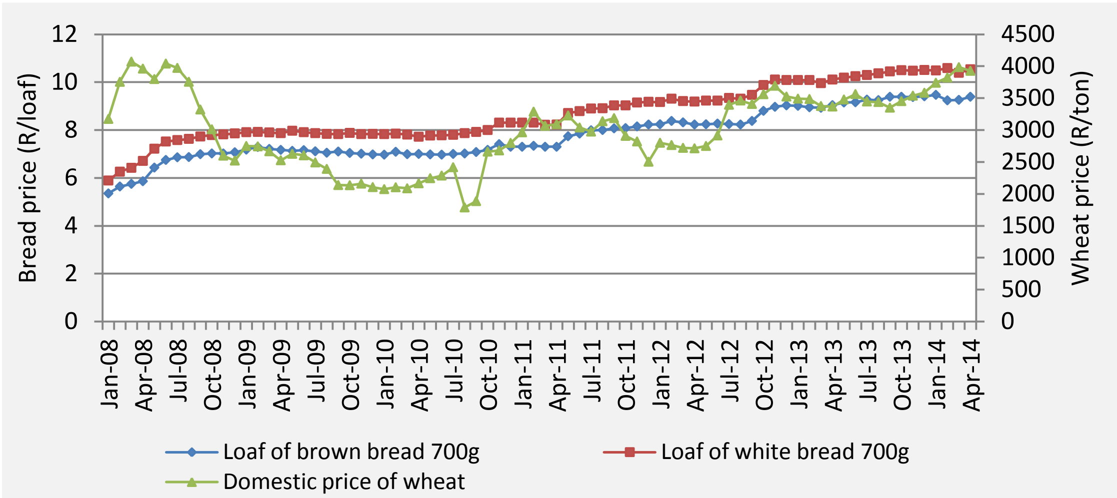


**Figure D.3: Domestic market wheat price and bread price trends**
**Source: Stats SA and SAFEX**

*D.2 Maize price trends*

Between April 2013 and April 2014:

International price of maize
↓ 17.18%

Domestic price of yellow maize
↑13.18%

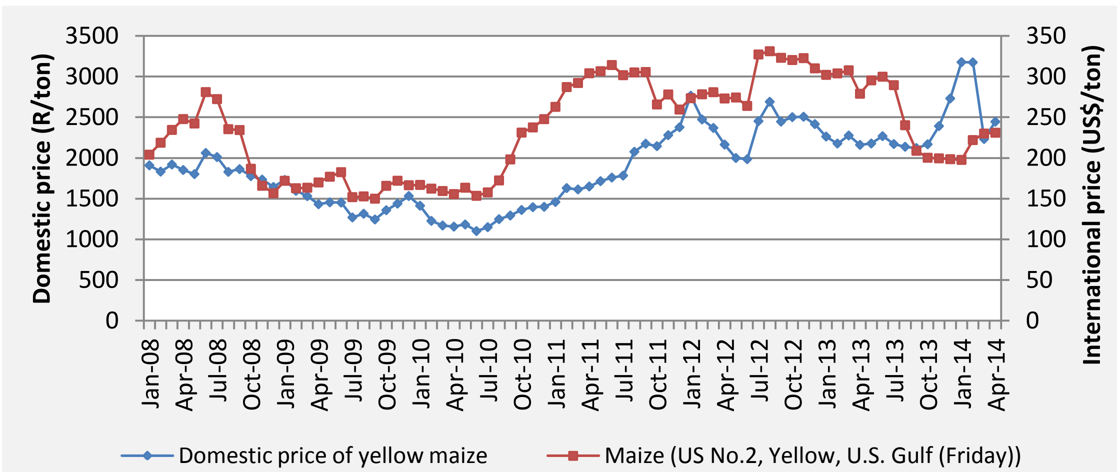


**Figure D.4: Domestic market price of maize against global market price**
**Source: FAO and SAFEX**

Between April 2013 and April 2014:

Export parity price of maize
↓ 11.92%

Import parity price of maize
↓1.25%

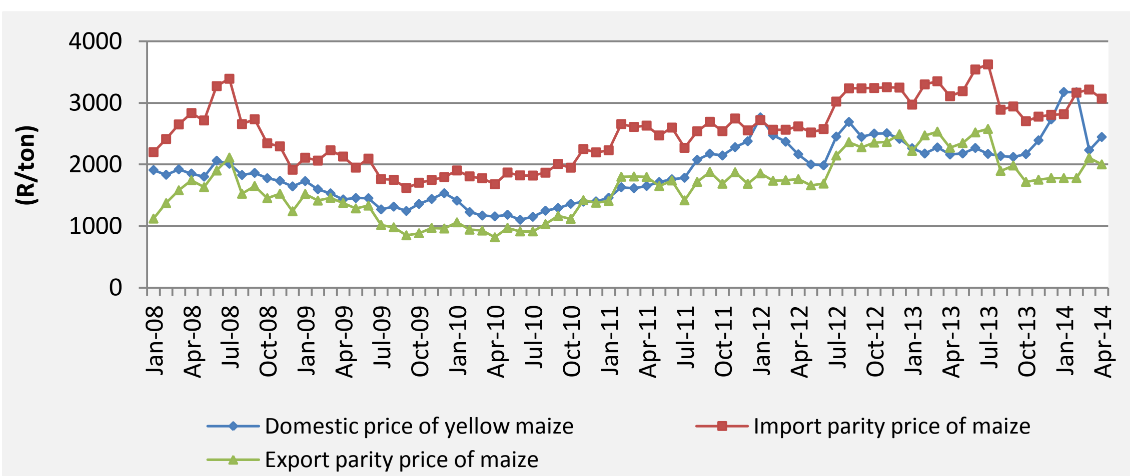


**Figure D.5: Import parity, export parity and domestic prices of maize**
**Source: SAFEX and SAGIS**

Between April 2013 and April 2014:

Super maize meal price
↓ 4.75%

Special maize meal
↑ 12.67%

Domestic price of white maize
↑ 11.12%

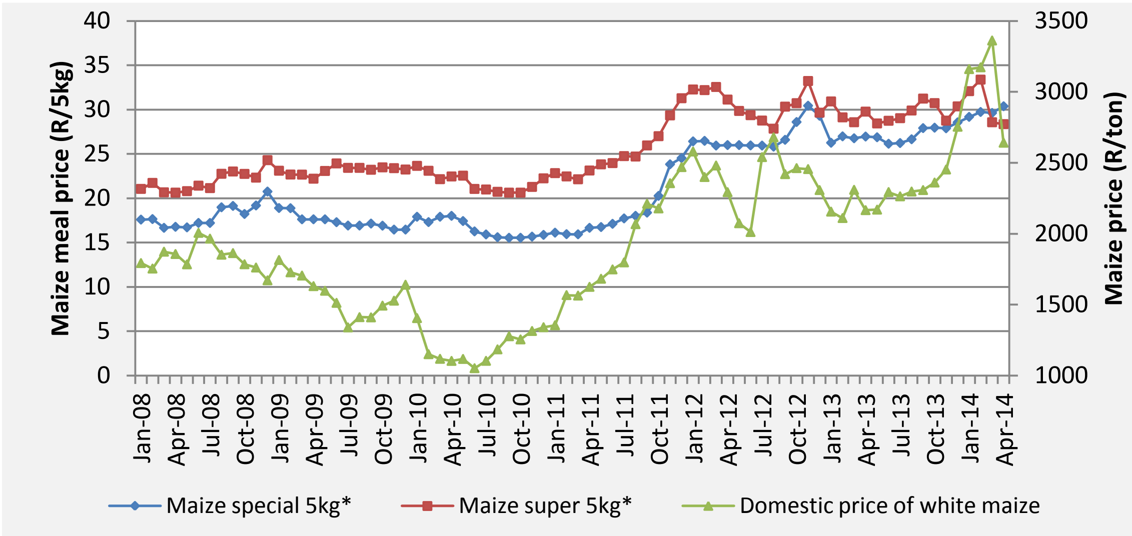


**Figure D.6: Maize price and maize meal price trends**
**Source: SAFEX and AC Nielsen**

*D.3 Sunflower seeds price trends*

Between April 2013 and April 2014:

Domestic price of sunflower seeds
↓ 8.13 %

International sunflowerseed price
↓12.12%

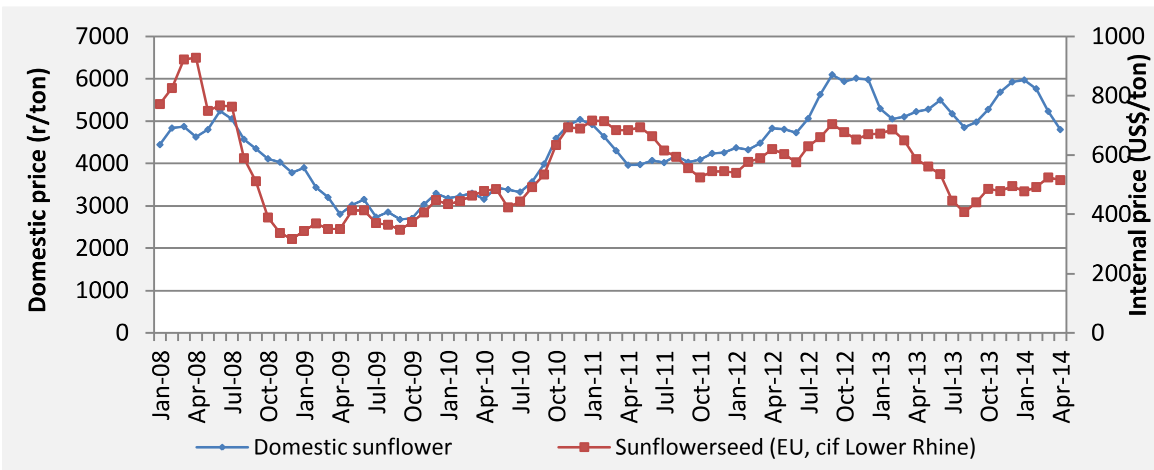


**Figure D.7: Domestic market price of sunflower seeds against global market price**
**Source: FAO and SAFEX**

Between April 2013 and April 2014:

Sunflower seed price
↓8.13%

Average retail sunflower oil price
↓ 0.48%

Sunflower oil 750 ml
↑2.82%

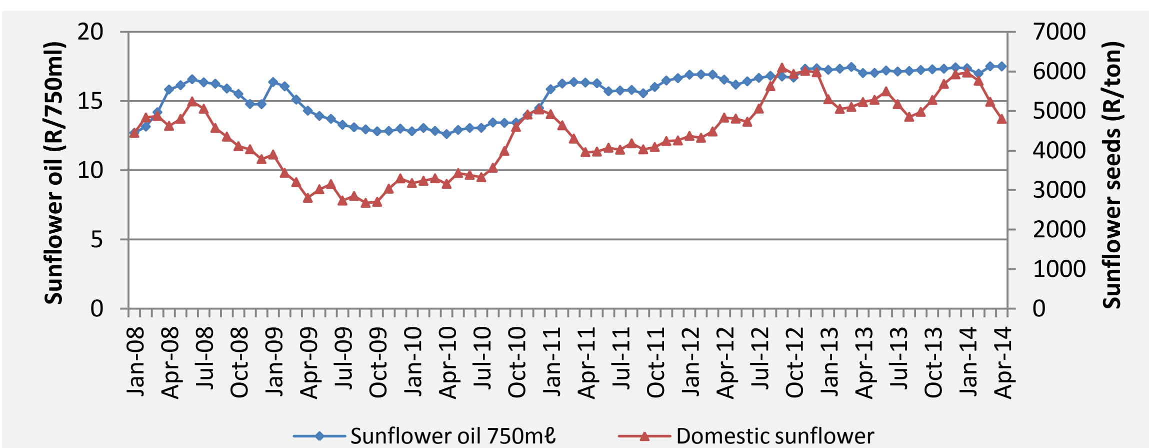


**Figure D.8: Sunflower seeds price and sunflower oil price trends**
**Source: SAFEX and Stats SA**

*D.4 Dairy price trends*

Between April 2013 and April 2014:

Skim milk powder
↓ 21.02%

Whole milk powder
↓ 17.75%

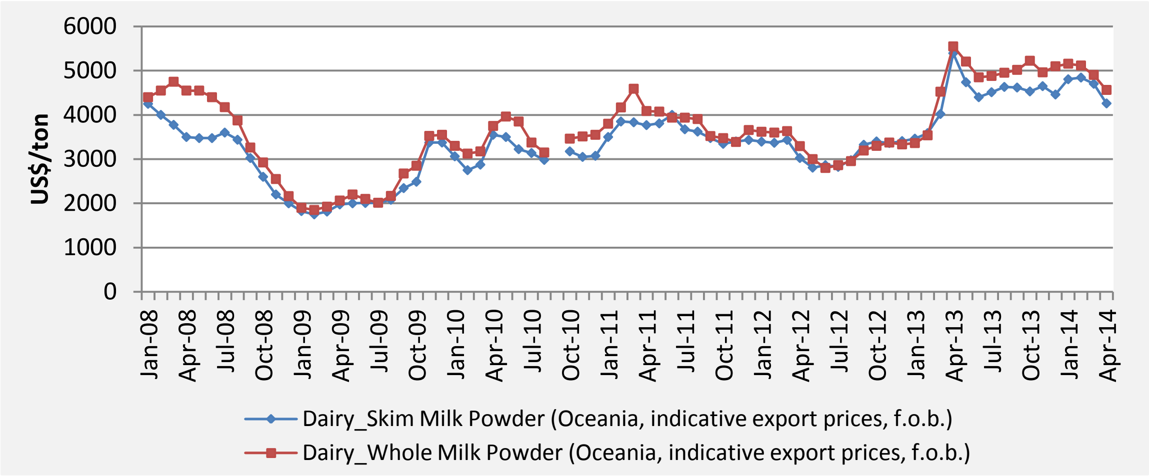


**Figure D.9: Skim milk powder and whole milk powder price trends**
**Source: FAO**

Between April 2013 and April 2014:

Milk producer price
↑ 9.38%

Full cream milk price
↓ 3.42%

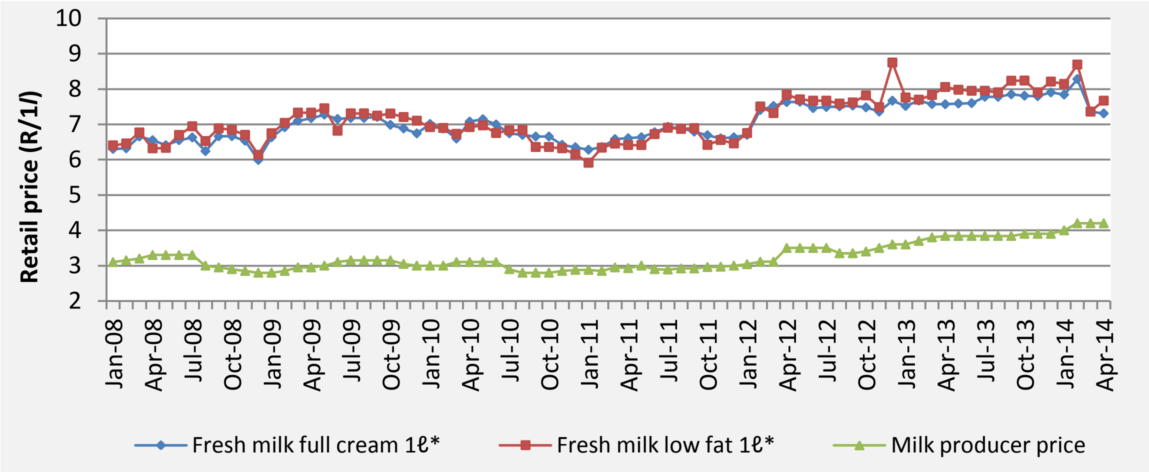


**Figure D.10: Domestic producer price and retail prices of milk**
**Source: MPO and AC Nielsen**

*D.5 Meat price trends*

The price of beef at retail level showed an average decrease of 5.29% for the different cuts.

Frozen chicken portions price ↑ by 6.17% per kilogram

Lamb price ↑10.32% and pork chops ↑4.46%

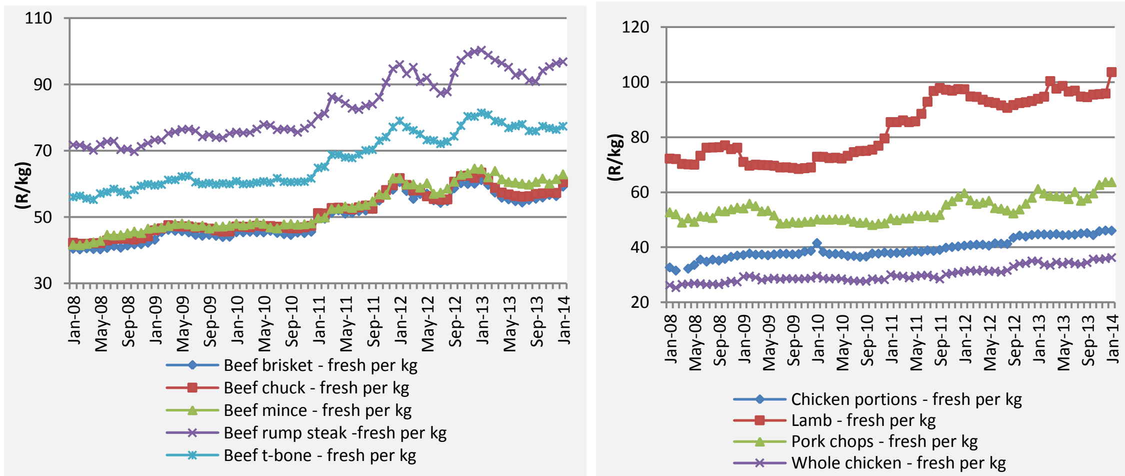


**Figure D.11: Retail prices of beef, pork chops, chicken portions, whole chicken and lamb**
**Source: Stats SA**

Between April 2013 and April 2014:

Producer price for fresh chicken ↑ 12.07%

Frozen chicken price ↑ 12.96%

Porker price ↑16.67%

Baconer price ↑21.24%

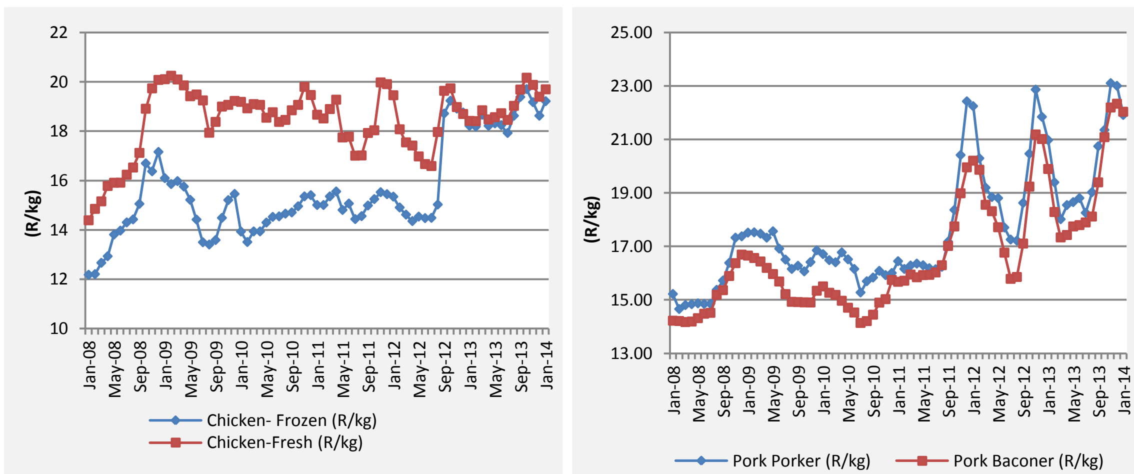


**Figure D.12: Producer prices of chicken and pork**
**Source: AMT**

Between April 2013 and April 2014:

Producer price of Beef-class A2/A3 ↑19.71%

Prices of beef class B2/B3 ↑14.33% and class C2/C3↑ 8.64%

Prices of lamb-class A2/A3 and class B ↑ 6.01% and ↓ 1.13% respectively;
Prices of class C2/C3 ↑ 7.02%

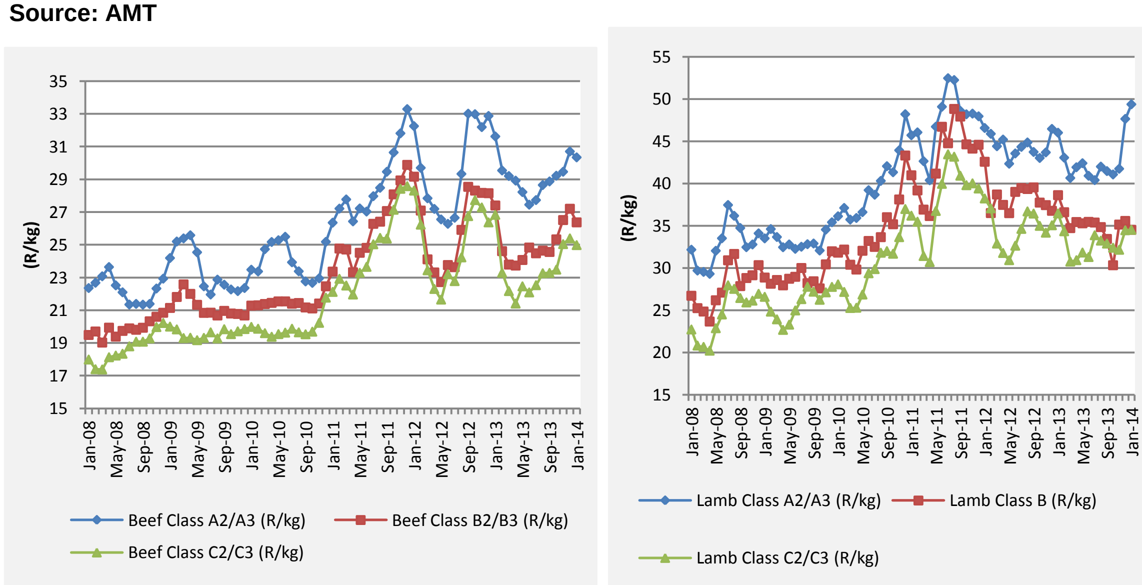


**Figure D.13: Producer prices of beef and lamb**
**Source: AMT**

# APPENDIX E: REAL FARM TO RETAIL PRICES SPREAD AND FARM VALUE SHARE OF STAPLE FOOD ITEMS

*E.1 Brown bread real farm-to-retail price spread and farm value share*

Between April 2013 and April 2014:

The real farm-to-retail price spread of brown bread ↑ 4.3%

The real farm value share of brown bread ↓ 7.5%

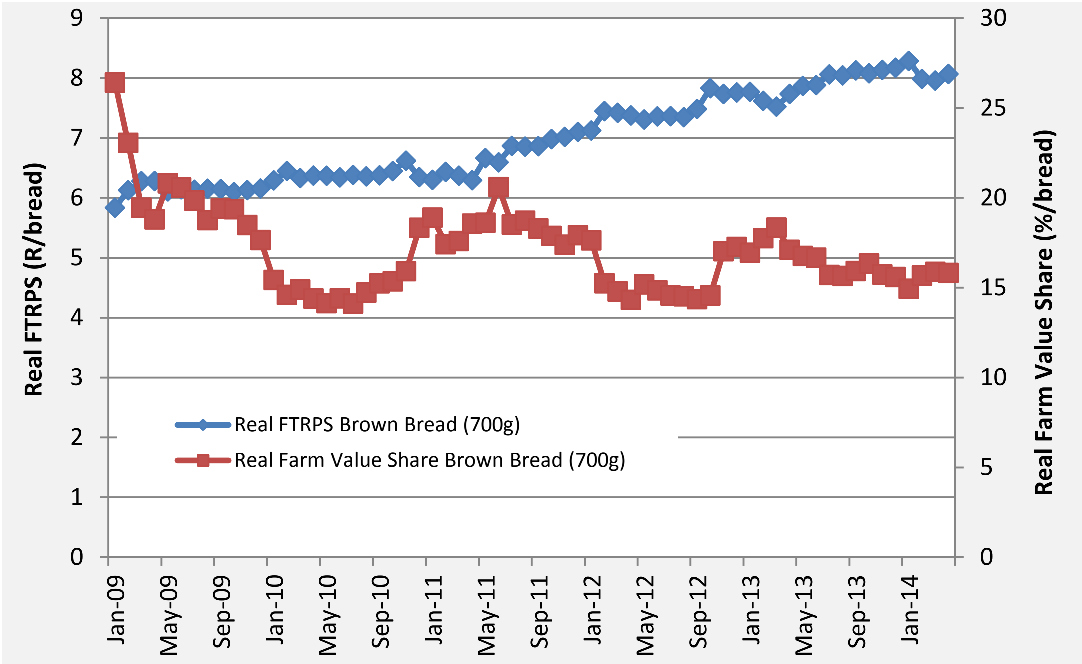


**Figure E.1: Real farm to retail price spread and real farm value share of brown bread. Source: SAFEX, Stats SA and own calculations**

*E.2 White bread real farm-to-retail price spread and farm value share*

Between April 2013 and April 2014:

The real farm-to-retail price spread of white bread ↓ 1.3%

The real farm value share of white bread ↓2.2%

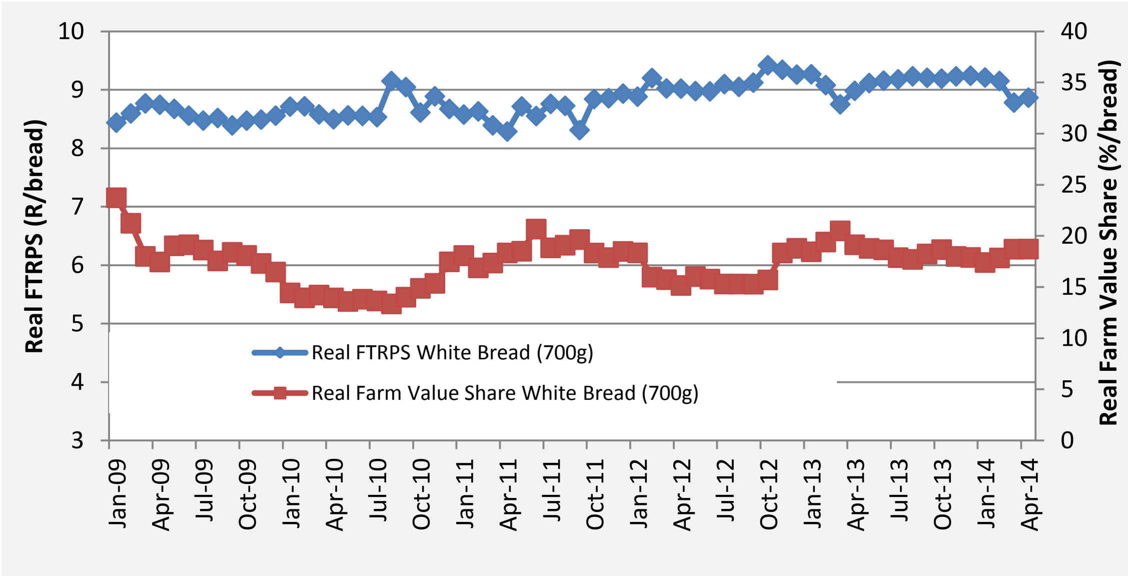


**Figure E.2: Real farm to retail price spread and real farm value share of white bread. Source: SAFEX, AC Nielsen and own calculations**

*E.3 Super maize meal real farm to retail price spread and farm value share*

Between April 2013 and April 2014:

The real farm-to-retail price spread of super maize meal ↓47.7%

The real farm value share of super maize meal ↑28.3%

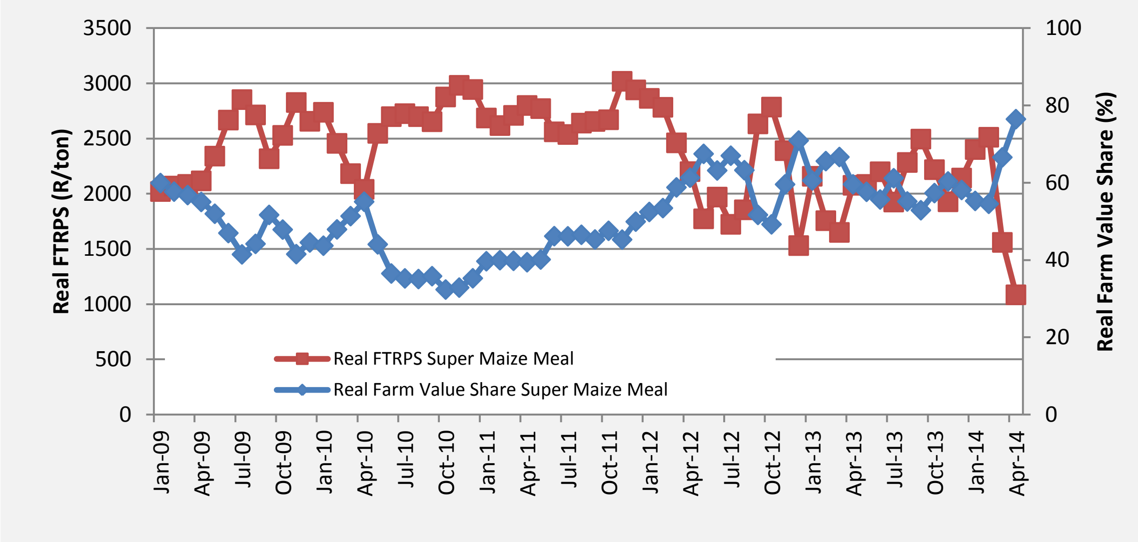


**Figure E.3: Real farm to retail price spread and real farm value share of super maize meal. Source: SAFEX, AC Nielsen and own calculations**

*E.4 Special maize meal real farm to retail price spread and farm value share*

Between April2013 and April 2014:

The real farm-to-retail price spread of special maize meal ↓4.03%%

The real farm value share of special maize meal ↑8.5%

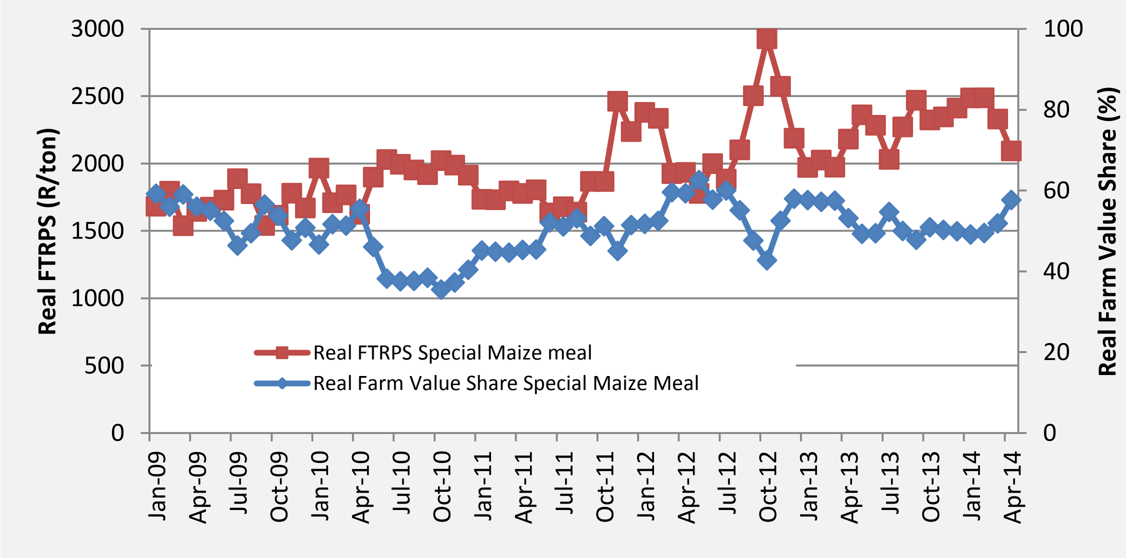


**Figure E.4: Real farm to retail price spread and real farm value share of special maize meal. Source: SAFEX, AC Nielsen and own calculations**

# APPENDIX F: DATA COLLECTION

Urban food prices reported by in this media release are obtained from Statistics South Africa (Stats SA) and AC Nielsen. These prices obtained from these two sources are regarded as being representative of changes in food prices in South Africa due to:

- Stats SA price data on all products are sampled from approximately 800 different data collections points across the country on a monthly basis. Food price data is not collected from all the data collection points since some stores that are sampled do not necessarily sell food. In addition, certain food prices are not sampled in all provinces. For example, the price of cheddar cheese is collected from Gauteng, Western Cape, Eastern Cape, KwaZulu-Natal, Free State, Northern Cape, North West and Mpumalanga. Food price data collection by Stats SA also involves fieldwork where price collectors visit stores to collect data, after which such data undergoes a rigorous process to ensure the integrity of the data. The basket of food products that are included was derived from the Income and Expenditure Survey of 2005/06 that was compiled by Stats SA to ensure that the basket is representative of consumer spending on food. For more detailed information on the methodological process involved in the collection of prices visit http://www.statssa.gov.za/cpi/documents/CPI_Sources_Methods.pdf.
- AC Nielsen collects food price data on a monthly basis from approximately 1000 large food chain stores across the country. Food prices are collected through scanners at the tellers in the big food chain stores after which it undergoes a rigorous process to ensure the integrity of the data. As is the case for Stats SA not all prices are collected in all provinces. For example, potato prices are collected from the core urban areas of Gauteng, KwaZulu-Natal, Eastern Cape, Western Cape and Free State provinces.
- During the fourth week of each month, retailers usually have specials on various items they sell, which is the reason why prices are not collected during that week. In an effort to include food price trends during week 4 for five retail chains, data was obtained from Adcheck.

*Compiled by:*

*Price trends and discussion on selected topics:*
*Londiwe Thabethe*
*Hester Vermeulen*
*Masego Moobi*
*Yolanda Potelwa*

*Outlook:*
*Ferdi Meyer*

*Enquiries:* *Simphiwe Ngqangweni or Christo Joubert: 012 341-1115 / 076 999 7766(Christo)*

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