NAMC

Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

February 2022

National Agricultural Marketing Council

www.namc.co.za

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1. BACKGROUND

This report provides estimates of an ideal performance of smallholder farmers in the National Fresh Produce Markets (NFPMs) in South Africa during February 2022. This performance is estimated based on a recommendation of the NAMC's Section 7 committee report on fresh produce markets, which states that "30% of the volume traded in fresh produce markets should be through black commission market agents", starting from the year 2014. The report covers 16 fresh produce markets spread across eight provinces in South Africa. The analysis is largely limited to potatoes, onions, tomatoes, bananas and other vegetables and fruits traded in the system. Monthly data for these commodities were obtained from the South African Union of Food Markets (SAUFM).

2. OVERVIEW OF THE MONTH – FEB 22

In February 2022 the total mass traded from the NFPMs was 246 222 metric tons (MT), generating a total revenue of R1.49 billion (see Table 1). This indicates 9% (19 494 MT) and 19% (R237 million) growth compared to the same month during the previous year. The growth of revenue and mass was expected given the country's rising population pushing high the demand for fresh produce on yearly-basis. On the other hand, this is indicative of the important role of fresh produce market system on the country's food security.

Table 1: Summary of fresh produce market statistics by top commodities in February 2022

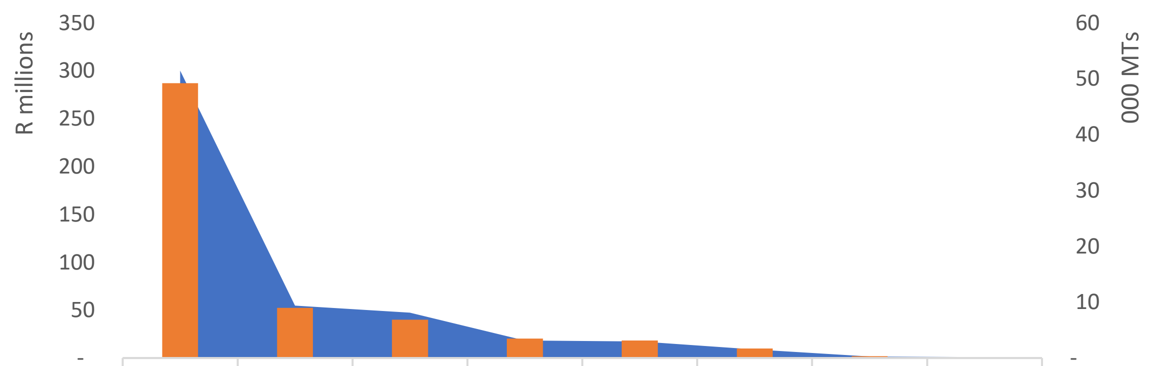
Commodity	Revenue	Mass
Total	R1 497 484 263	246 222
Potatoes	311 185 899	89 192
Onions	115 545 493	31 887
Tomatoes	168 572 551	15 821
Bananas	159 654 297	21 672
Other vegetables	288 869 660	49 564
Other fruits	453 656 363	44 745

Source: South African Union of Food Markets (2022)

Potatoes had a total mass of 89 192 MT, indicating an increase of 8% (6 554 MT) compared to the same month in the previous year. Their revenue also increased by 8% (R24 million) during the same period. The total mass for onions also increased by 14% (3 869 MT) to reach 31 887 MT in February 2022. The revenue also grew by 28% (R25 million) to reach R115 545 493. Tomatoes had a total mass of 15 821 MT, indicating an increase by 8% (translated as 1 149 MT) and this traded mass was matched by total revenue of R168 million, indicating 21% increase. Bananas showed a massive increase of 39% (6 103 MT) in mass traded and 22% (R34 million) growth in revenue to reach R159 million in February 2022. Other vegetables traded in the system recorded a slight increase of 8% in mass matched by an increase of 17% (R42 million) in revenue. On the other hand, the other fruits recorded an increase of 12% (4 667 MT) to reach a total traded mass of 44 745 MT in February 2022. The revenue of these fruits also grew by 22% (R81 million).

3. ESTIMATED SHARE OF SMALLHOLDER FARMERS

Essentially, this section analyses the ideal estimated share of smallholder farmers by top four performing agricultural products including other vegetables and fruits. This is based on the 30% proposal made in the NAMC Section 7 Committee report on national fresh produce markets. This volume is assumed to be obtained or representing the share of smallholder farmers in the national fresh produce market system in South Africa.



	GP	KZN	WC	FS	EC	NW	MP	NC
Revenue	300228 7	54787 02	47387 77	18212 32	17392 97	8884 358	1489 595	862 461
Mass	49 214	9 002	6 855	3 484	3 131	1 697	334	150

Figure 1: Summary of estimated share of smallholder farmers in different provinces by revenue and mass, February 2022
Source: South African Union of Food Markets (2022)

For the entire month of February 2022, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 73 867 MT and R449 million, respectively. A further analysis of this at the provincial level show that Gauteng (GP) province was leading at 49 214 MT matched by a revenue of R300 million (See Figure 1). This was followed by Kwa-Zulu Natal (KZN) at 9 002 MT (R54 million), Western Cape (WC) at 6 855 MT (R47 million), Eastern Cape (EC) at 3 484 MT (R18 million), Free State (FS) at 3 131 MT (R17 million), North West (NW) at 1 697 MT (R8 million) and Mpumalanga (MP) province was at 334 MT (R1.48 million). The Northern Cape (NC) province had the lowest share of 150 MT (R862 461) from smallholder farmers over the period under review.

3.1 POTATOES

Potatoes remain the largest traded agricultural product in the fresh produce market system in South Africa. The highest market share of smallholder farmers in potatoes was observed in Gauteng province (GP) at 66% (R59 million) revenue and 64% (17 195 MT) mass (see Table 2). This was followed by Kwa-Zulu Natal (KZN) at 11% (R9 million) revenue and 13% (3 387 MT), Western Cape (WC) at 7% (R6 million) revenue and 8% (2 154 MT), Eastern Cape (EC) at 6% (R5.01 million, 1 560 MT), Free State (FS) at 6% both revenue (R5.00 million) and mass (1 311) mass. The least contributing provinces to the share of smallholder farmers were North West (NW) at 3% (R2 million, 891 MT) in both mass and revenue, Mpumalanga at 1% (R100 762, 189 MT) both revenue and mass, and NC at R304 814 in revenue and 71 MT in mass, respectively. The overall share in potatoes was R89 million (26 758 MT).

Table 2: Summary of estimated share of smallholder farmers in potatoes at provincial level, February 2022

Province	Revenue	Mass
GP	R59 447 260	17 195
KZN	R9 566 065	3 387
WC	R6 647 904	2 154
EC	R5 014 461	1 560
FS	R5 003 499	1 311
NW	R2 895 521	891
MP	R612 619	189
NC	R304 814	71

Source: South African Union of Food Markets (2022)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 10 376 MT (39%), followed by Tshwane at 5 211 MT (19%), Durban at 2 797 MT (10%), Cape Town at 8% (2 154 MT) and Springs at 5% (1 345 MT). Other markets in the top ten included Klerksdorp (891 MT), Port Elizabeth (790 MT), East London (731 MT) and Bloemfontein (731 MT) all at 3%. Pietermaritzburg had the least share in potatoes among the top ten markets at 2% (590 MT).

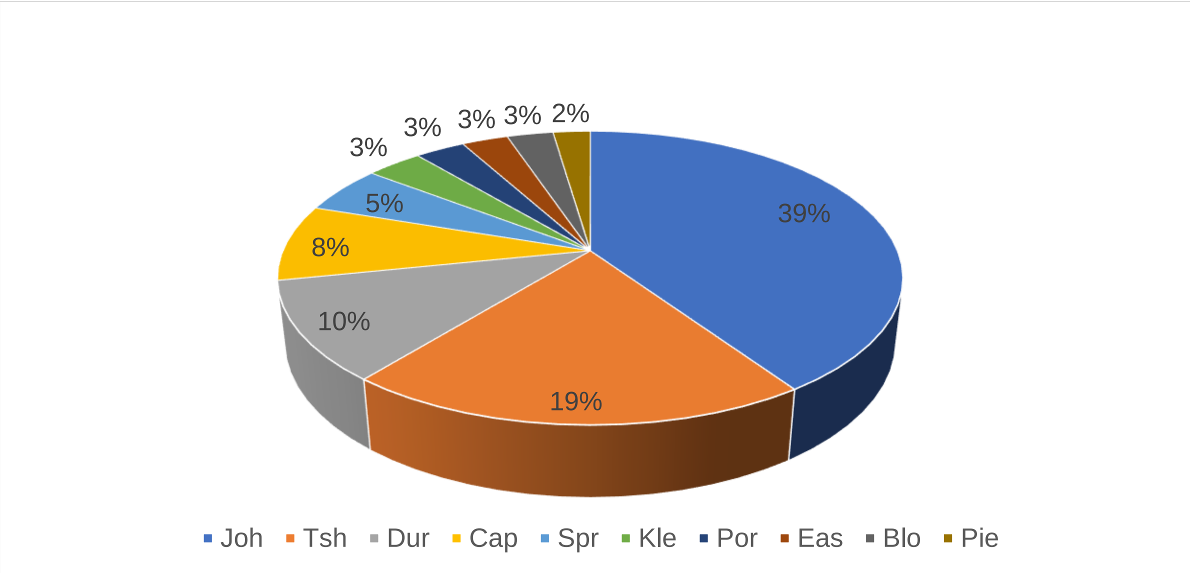


Figure 2: Estimated share in top 10 markets by mass for potatoes, February 2022

Source: South African Union of Food Markets (2022)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R38 million (41%), followed by Tshwane at R17 million (19%), Durban at R9 million (10%), Cape town at R6 million (7%), and Springs at R4 million (5%), respectively. Other markets in the top ten included Klerksdorp (R3million), East London (R2.75 million) Bloemfontein (R2.65 million) and Port Elizabeth (R2.36 million) at 3%. The Welkom (R2.26 million) market commanded the least share in potatoes among the top ten at 2% (R1.99 million).

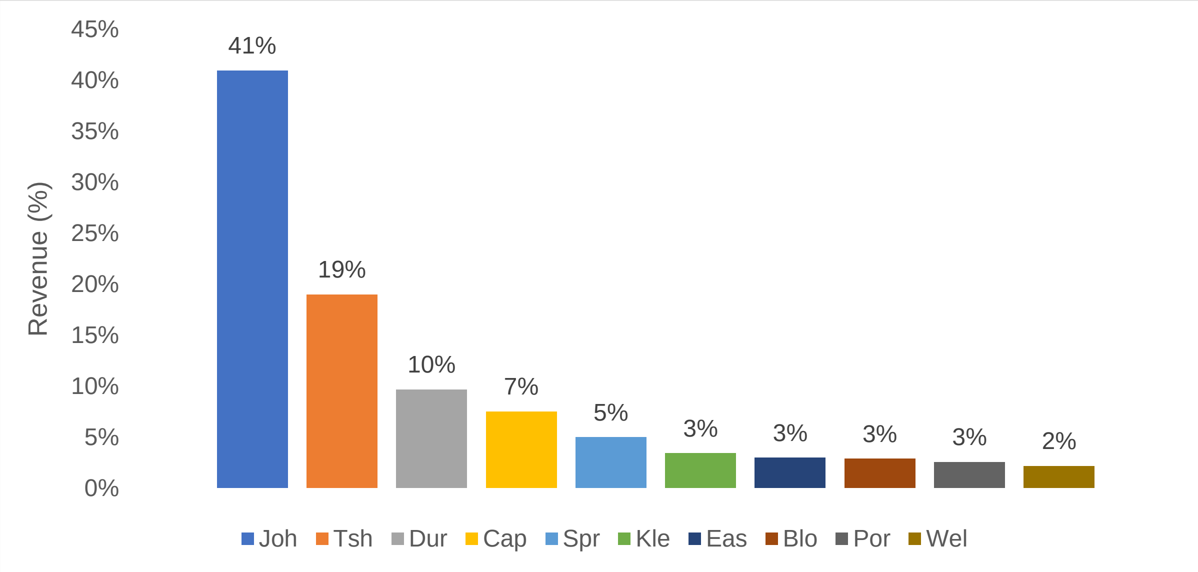


Figure 3: Estimated shares in revenue by top 10 markets for potatoes, February 2022

Source: South African Union of Food Markets (2022)

3.2 ONIONS

Table 3 presents onions estimated share of smallholder farmers in eight provinces. Gauteng (GP) was the leading province with 69% (R23 million) revenue and 71% (6 777 MT) mass, followed by Kwa-Zulu Natal (KZN) with 13% (R4 million) revenue and 14% (1 336 MT) mass, Western Cape (WC) at 9% (R3 million) revenue and 7% (671 MT) mass, Eastern Cape (EC) at 5% revenue (R1 million) and 4% mass (406 MT), Free State (FS) at 3% revenue (R914 868) and 2% mass (230 MT), North West (NW) at 3% both revenue (R415 767) and mass (104 MT), and Mpumalanga (MP) at 0.27% (R90 124) revenue and 0.34% (32 MT).

The Northern Cape (NC) at R39 579 (revenue) and 10 MT (mass) had the lowest share of smallholder farmers in onions. The overall share was R33 million and 9 566 MT.

Table 3: Summary of estimated share of smallholder farmers in onions at provincial level, February 2022

Province	Revenue	Mass
GP	R23 205 080	6 777
KZN	R4 376 474	1 336
WC	R3 134 444	671
EC	R1 684 952	406
FS	R914 868	230
NW	R415 767	104
MP	R90 124	32
NC	R39 579	10

Source: South African Union of Food Markets (2022)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in February 2022. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 4 914 MT (51%). It was followed by Tshwane at 1 604 MT (17%), Durban at 1 164 MT (12%), Cape Town at 671 MT (7%) and Springs at 242 MT (3%). Other markets include East London (217 MT), Port Elizabeth (188 MT), Pietermaritzburg (172 MT) and Bloemfontein (148 MT) at 2%. Klerksdorp (104 MT) had the least share of smallholder farmers in onions among the top ten markets at 1%.

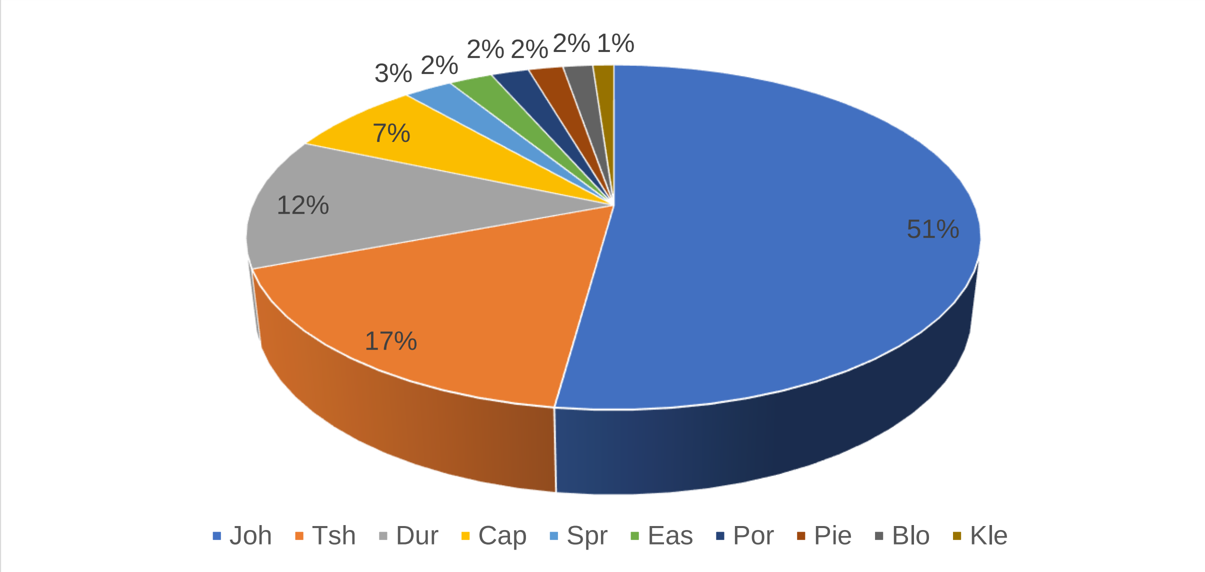


Figure 4: **Estimated shares in top 10 markets by mass for onions, February 2022**

Source: South African Union of Food Markets (2022)

The estimated shares of smallholder farmers by revenue in onions in top 10 markets, measured in percentages, are presented in Figure 5. Leading the list of the top 10 markets was Johannesburg at 48% (R16 million), followed by Tshwane at 16% (R5.59 million), Durban at 15% (R5.23 million), Cape Town at 8% (R2 million), East London at 3% (R857 166), Port Elizabeth (R857 166), Springs (R751 414), Pietermaritzburg (R609 140) and Bloemfontein (R597 822) at 2%. Klerksdorp (R341 622) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

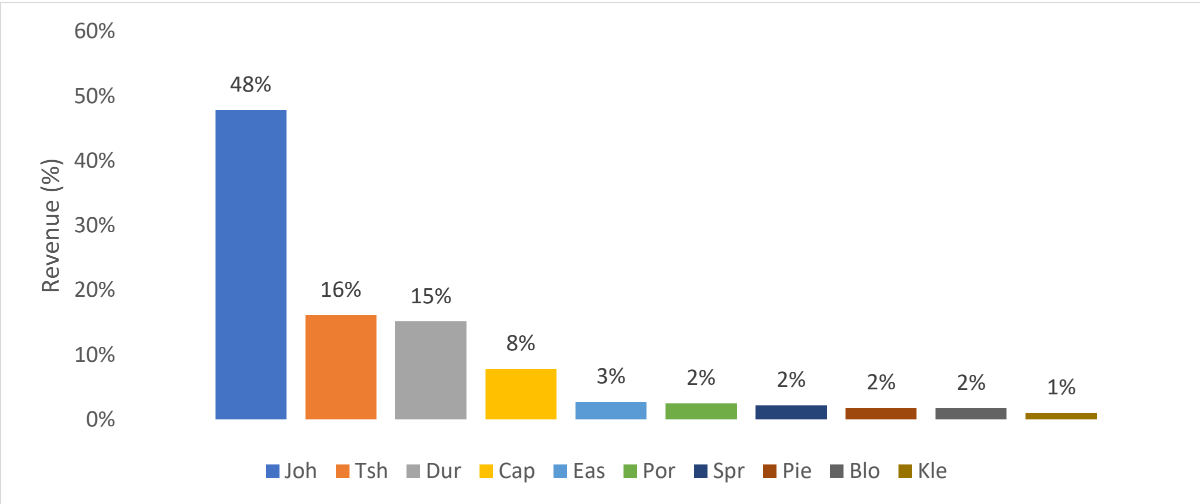


Figure 5: **Estimated shares in revenue by top 10 markets for onions, February 2022**

Source: South African Union of Food Markets (2022)

3.3 TOMATOES

Table 4 presents tomatoes estimated share of smallholder farmers in eight provinces of South Africa. Gauteng (GP) was the leading province at 65% revenue (R33 million) and 66% mass (3 123 MT), followed by Western Cape (WC) at 16% revenue (R8 million) and 15% mass (728 MT), Kwa-Zulu Natal (KZN) at 9% both revenue (R4 million) and mass (440 MT), Free State (FS) at 4% both revenue (R2 million) and mass (176 MT), Eastern Cape (EC) at 3% revenue (R1.53 million) and 4% mass (171 MT), and North West (NW) at 2% both revenue (R1.10 million) and mass (72 MT). The Northern Cape (NC) was at 0.42% revenue (R214 542) and 0.44% mass (21 MT).

The Mpumalanga (MP) province was at 0.25% in revenue (R129 119) and 0.34% in mass (32 MT), thus making it the lowest contributor to smallholder farmers' share in tomatoes among the top ten markets. Nonetheless, the overall estimated share of smallholder farmers in tomatoes was R51 million and 4 746 MT.

Table 4: Summary of estimated share of smallholder farmers in tomatoes at provincial level, February 2022

Province	Revenue	Mass
GP	R33 610 589	3 123
WC	R8 105 027	728
KZN	R4 512 936	440
FS	R2 188 768	176
EC	R1 527 972	171
NW	R1 101 030	72
NC	R214 542	21
MP	R129 119	16

Source: South African Union of Food Markets (2022)

Tomatoes were the fourth largest traded commodity in terms of mass at fresh produce markets in February 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 48%, translated as 2 292 MT (see Figure 6). This market was followed by Cape Town at 728 MT (16%), Tshwane at 686 MT (13%), Durban at 416 MT (9%), and Springs at 3% (144 MT). The Bloemfontein (117 MT), East London (87 MT), Port Elizabeth (84 MT) and Klerksdorp (72 MT) markets were at 2%. Welkom (59 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 1%.

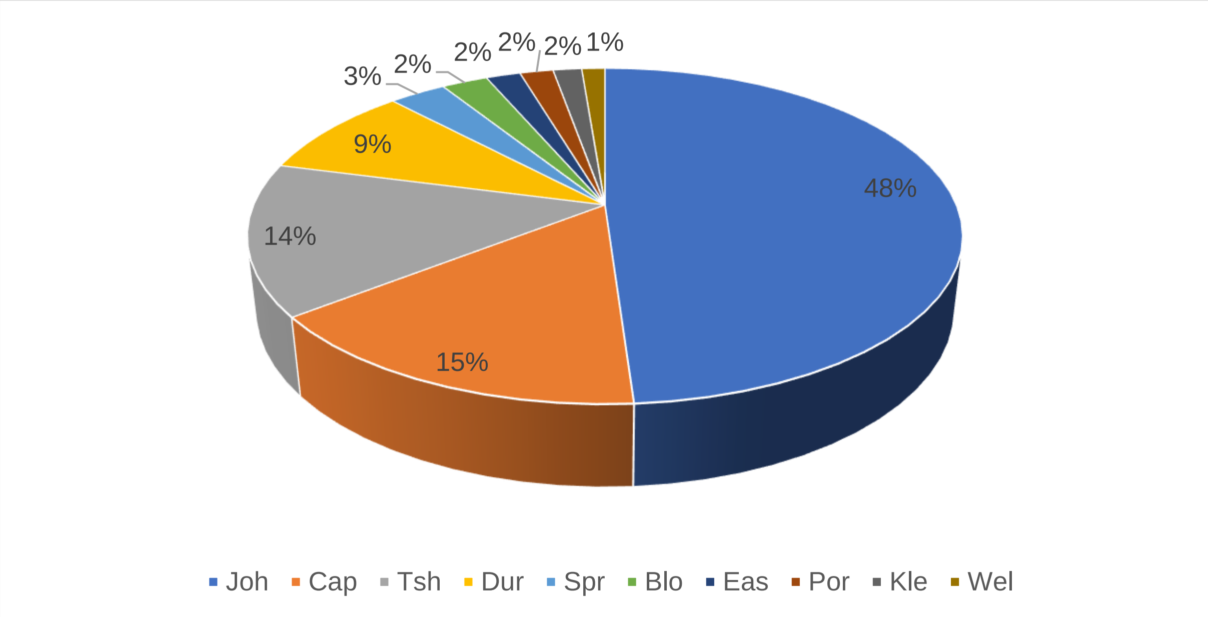


Figure 6: Estimated share in top 10 markets by mass for tomatoes, February 2022

Source: South African Union of Food Markets (2022)

The estimated share of smallholder farmers by revenue in tomatoes for top 10 markets, measured in percentages is presented in Figure 7. Leading the list of the top 10 markets was Johannesburg at 48% (R24 million), Tshwane at 16% (R8 million), Cape town at 15% (R7 million), Durban at 8% (R4 million), Springs (R1.40 million) and Bloemfontein (R1.29million) both at 3%. The Welkom (R780 897) fresh produce market stood at 2%. The Klerksdorp (R995 890), East London (R853 790) and Port Elizabeth (R766 590) also stood at 2%. Welkom (R753 873) had the lowest share of smallholder farmers in tomatoes among the top ten markets at 1%.

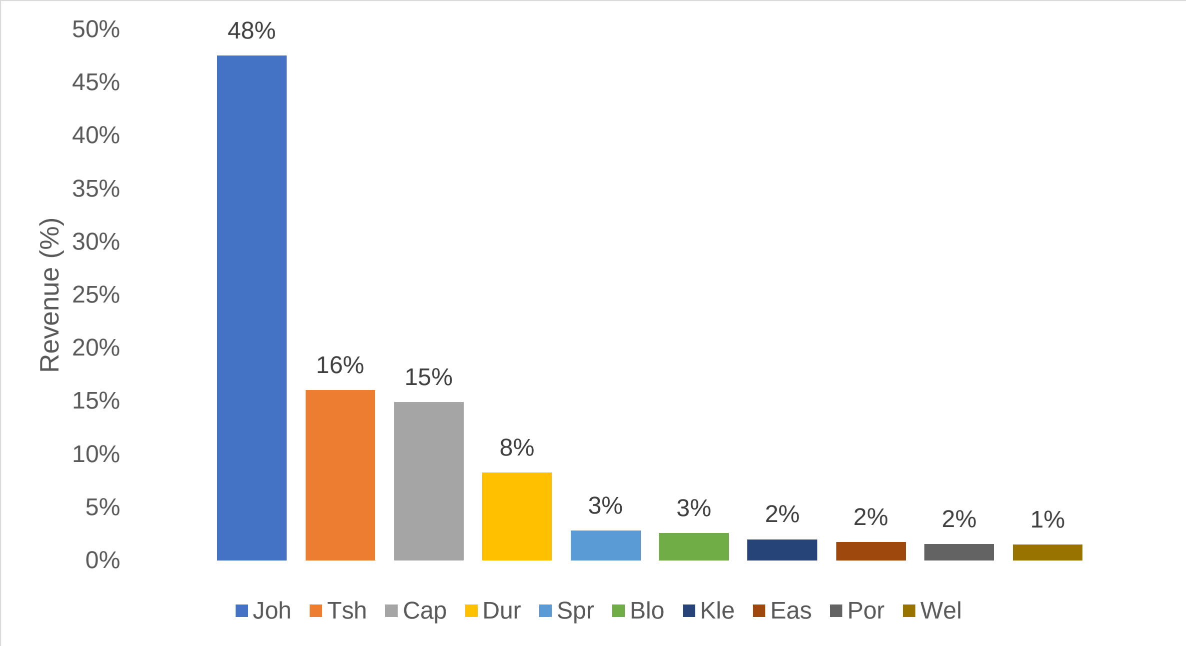


Figure 7: Estimated share in revenue by top 10 markets for tomatoes

Source: South African Union of Food Markets (2022)

3.4 BANANAS

Table 5 presents bananas estimated share of smallholder farmers in eight provinces of South Africa. Gauteng (GP) was the leading province with revenue of 54% (R25 million) matched by mass of 56% (3 649 MT), followed by Western Cape (WC) at 16% in revenue (R7 million) and 15% in mass (998 MT), Kwa-Zulu Natal (KZN) at 14% both revenue (R6 million) and mass (887 MT), Eastern Cape (EC) at 9% in revenue (R4 million) and 7% (472 MT), Free State (FS) at 5% both revenue (R2 million) revenue and mass (309 MT) and North West (NW) at 2% both revenue (R1 million) and mass (151 MT).

The share of smallholder farmers in bananas in Mpumalanga was estimated at 0.18% (R82 698) revenue and 0.54% (35 MT) while Northern Cape had the lowest estimated share of smallholder farmers in tomatoes (0.30 MT, R3 203) over the reported month. The estimated overall smallholder share for bananas was R47 million and 6 502 MT.

Table 5: Summary of estimated share of smallholder farmers in bananas at provincial level, February 2022

Province	Revenue	Mass
GP	R25 470 653	3 649
WC	R7 532 739	998
KZN	R6 646 911	887
EC	R4 027 242	472
FS	R2 272 368	309
NW	R1 010 894	151
MP	R82 698	35

Source: South African Union of Food Markets (2022)

Bananas constituted the most traded fruit on the fresh produce market system in February 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 33% (2 132 MT) (see Figure 8). It was followed by Tshwane at 19% (1 258 MT), Cape Town at 14% (887 MT), Durban at 11% (746 MT), East London at 5% (308 MT), Pietermaritzburg (252 MT) and Springs (234 MT) at both 4%. The Bloemfontein (191 MT) and Port Elizabeth (164 MT) were both at 3%. Among the top ten markets Klerksdorp fresh produce market (136 MT) commanded the least estimated share of smallholder farmers at 2%.

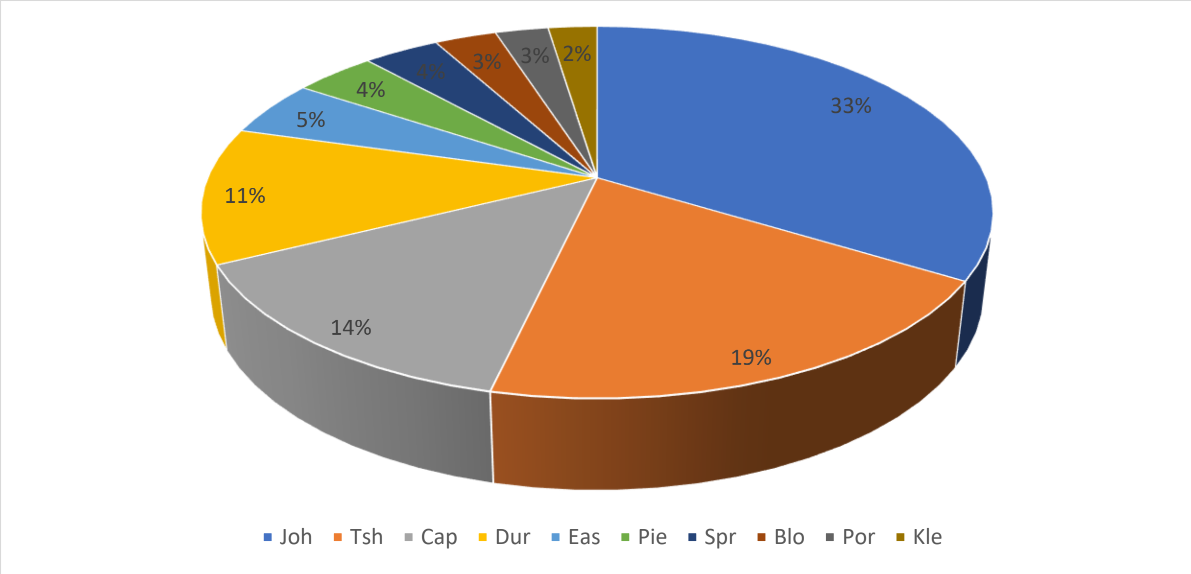


Figure 8: Estimated shares in top 10 markets by mass for bananas, February 2022

Source: South African Union of Food Markets (2022)

The estimated share of smallholder farmers by revenue in bananas for top 10 markets, measured in percentages is presented in Figure 9. Leading the list of the top 10 markets was Johannesburg at 32% (R15 million), Tshwane at 19% (R9 million), Cape Town at 15% (R7 million), Durban at 12% (R5 million) and East London at 5% (R2 million). The Bloemfontein (R1.56 million), Port Elizabeth (R1.50 million), Springs (R1.46 million) and Pietermaritzburg (R1.45 million), were at 3%. Among the top ten, Klerksdorp fresh produce market had the least share at 2% (R1 million).

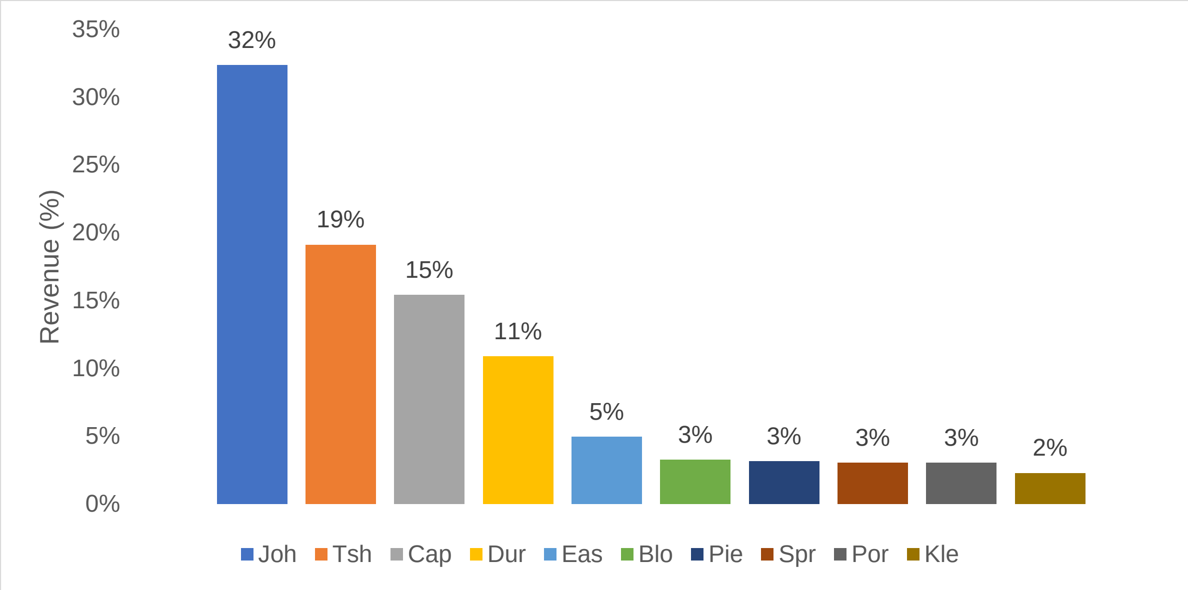


Figure 9: Estimated shares revenue by in top 10 markets for bananas

Source: South African Union of Food Markets (2022)

3.5 OTHER VEGETABLES

Table 6 presents the other vegetables estimated share of smallholder farmers in eight provinces in South Africa. Gauteng (GP) was the leading province with revenue of 71% (R53 million) matched by mass of 73% (10 860 MT), followed by Western Cape (WC) at 13% (R9 million) revenue and 10% (1 432 MT) mass, Kwa-Zulu Natal at 13% in revenue (R5 million) and 7% in mass (1 140 MT), Eastern Cape at 8% both revenue (R2.41 million) and mass (560 MT), Free State at 3% both revenue (R2.24 million) and mass (503 MT), and North West at 1% (R1 million) revenue and 2% (29 MT) mass.

Mpumalanga (MP) had 0.19% (R140 101) revenue and 0.34% (51 MT) mass. The Northern Cape (NC) had the lowest share at 0.12% (R90 809) revenue and 0.19% (28 MT) mass. The overall share of smallholder farmers in other vegetables in February 2022 was R75 million and 14 869 MT.

Table 6: Summary of estimated share of smallholder farmers in other vegetables at provincial level, February 2022

Province	Revenue	Mass
GP	53 833 020	10 860
WC	9 706 910	1 432
KZN	5 943 685	1 140
EC	2 409 604	560
FS	2 238 756	503
NW	1 061 635	295
MP	140 101	51
NC	90 809	28

Source: South African Union of Food Markets (2022)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in January 2022 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 50% (7 394 MT) (see Figure 10), followed by Tshwane at 21% (3 111 MT), Cape Town at 10% (1 432 MT) and Durban at 7% (1 053 MT). The Bloemfontein (363 MT), Springs (326 MT), Klerksdorp (295 MT), East London (269 MT) and Port Elizabeth (233 MT) markets had the same share at 2%. Welkom (197 MT) commanded the lowest share of smallholder farmers among the top ten markets both at 1%.

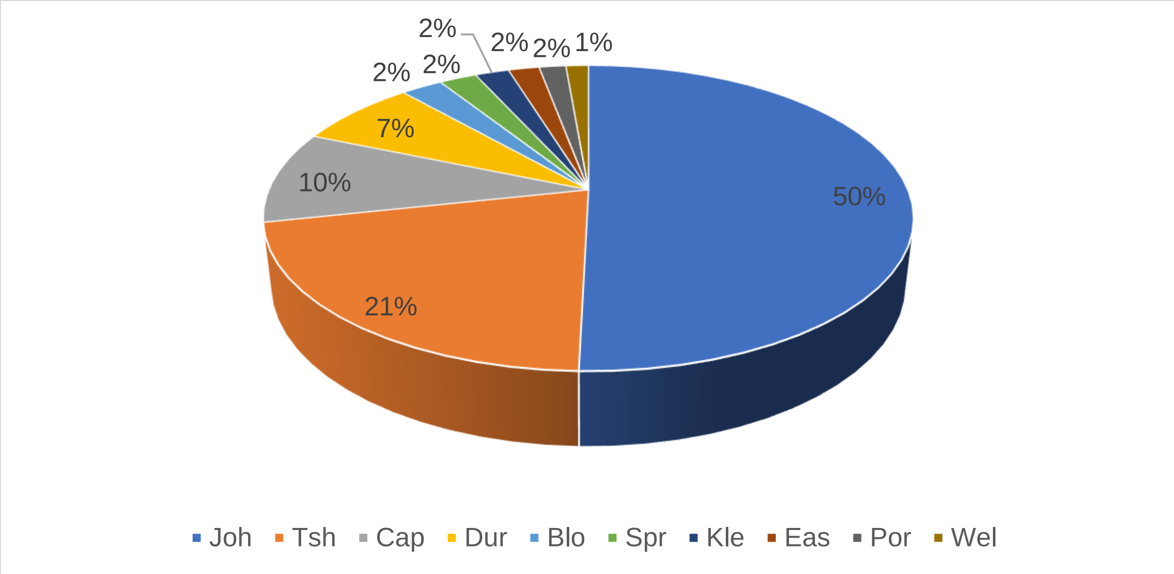


Figure 10: **Estimated shares in top 10 markets by mass for other vegetables, February 2022**

Source: South African Union of Food Markets (2022)

The estimated share of smallholder farmers by revenue in other vegetables for top 10 markets, measured in percentages is presented in Figure 11. Leading the list of the top 10 markets was Johannesburg at 52% (R44 million), Tshwane at 18% (R15 million), Cape Town 13% (R11 million), Durban at 8% (R6 million) and Bloemfontein (R1.66 million) and East London (R1.43 million) both at 2%. The Springs (R1.26 million), Klerksdorp (R1.25 million) and Port Elizabeth (R1.14) had the same share at 1%. Welkom had the least share of revenue for smallholder farmers among the top ten markets at R626 108.

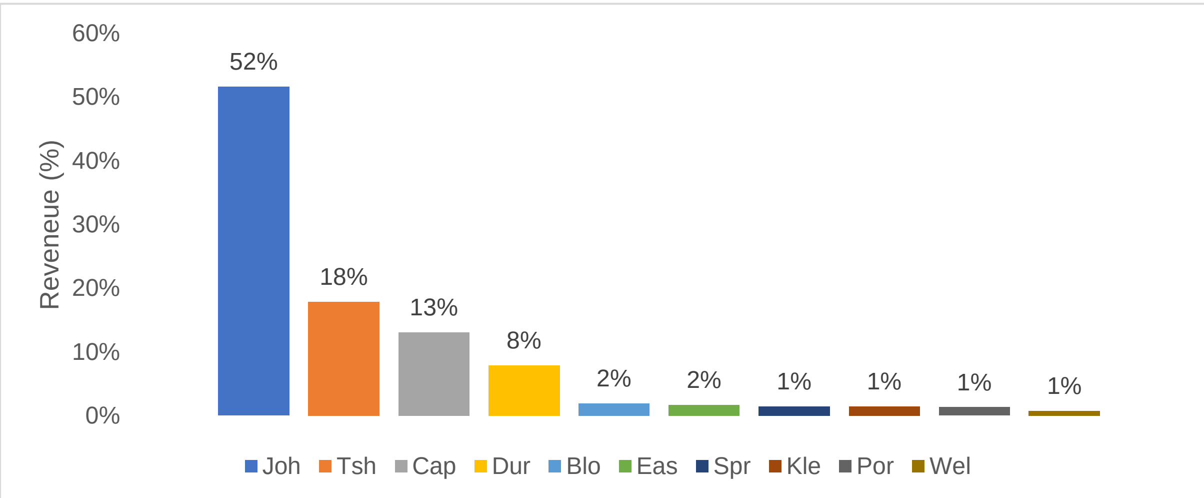


Figure 11: **Estimated shares in revenue by markets for other vegetables, January 2022**

Source: South African Union of Food Markets (2022)

3.6 OTHER FRUITS

Table 7 presents the other fruits estimated share of smallholder farmers in eight provinces in South Africa during January 2022. Gauteng (GP) province was leading with a revenue of 67% (R94 million) and 66% (8 799 MT) mass, followed by Kwa-Zulu Natal (KZN) at 15% both revenue (R21 million) and mass (2 068 MT), Western Cape (WC) at 10% revenue (R 13 million) and 9% mass (1 208 MT), Free State (FS) at 4% for both revenue (R5 million) and mass (569 MT), Eastern Cape (EC) at 2% for revenue (R3 million) and 3% mass (464 MT), and North West (NW) at 1% revenue (R1 million) and 2% mass (286 MT).

Northern Cape had 0.08% (R117 026) revenue and 0.17% (23 MT) mass. The Mpumalanga province had the lowest estimated share of smallholder farmers at 0.07% (R100 762) matched by 7 MT (0.05%) mass. The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R140 million matched by 13 424 MT.

Table 7: Summary of estimated share of smallholder farmers in other fruits at provincial level, February 2022

Province	Revenue (R)	Mass (MT)
GP	94 815 059	8 799
KZN	21 278 770	2 068
WC	13 458 486	1 208
FS	5 782 800	569
EC	3 183 025	464
NW	1 949 357	286
NC	117 026	23
MP	100 762	7

Source: South African Union of Food Markets (2022)

Market shares for other fruits traded in the various fresh produce markets in February 2022 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 42% (5 662 MT) (see Figure 12), followed by Tshwane at 20% (2 714 MT), Durban at 13% (1 751 MT), Cape Town at 9% (1 208 MT) with Springs (397 MT) and Bloemfontein (381 MT) at 3%. The Pietermaritzburg (316 MT), Klerksdorp (286 MT) and East London (281 MT) had the same share at 2%. Welkom fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 1% (189 MT).

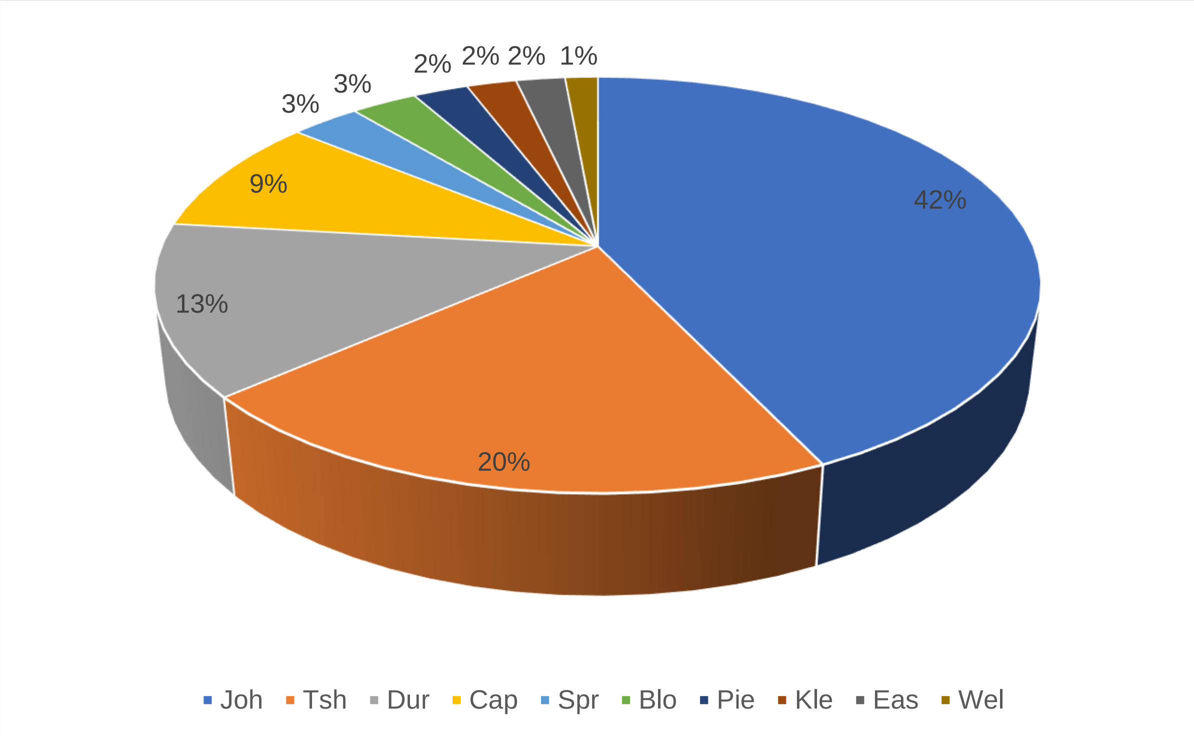


Figure 12: Estimated shares in top 10 markets by mass for other fruits, February 2022

Source: South African Union of Food Markets (2022)

The estimated share by revenue in other vegetables for top 10 markets, measured in percentages, is presented in Figure 13. Leading the list of the top 10 markets was Johannesburg at 46% (R62 million), Tshwane at 20% (R27 million), Durban at 12% (R16 million), Cape Town at 8% (R11 million) and Bloemfontein at 3% (R3.75 million). The Springs (R3.39 million), East London (R2.91 million), and Pietermaritzburg (R2.85 million) markets had the same share at 2%. Klerksdorp had 1% (R2.02 million) revenue. On the other hand, Welkom (R287 640) had the lowest share of smallholder farmers among the top ten fresh produce markets.

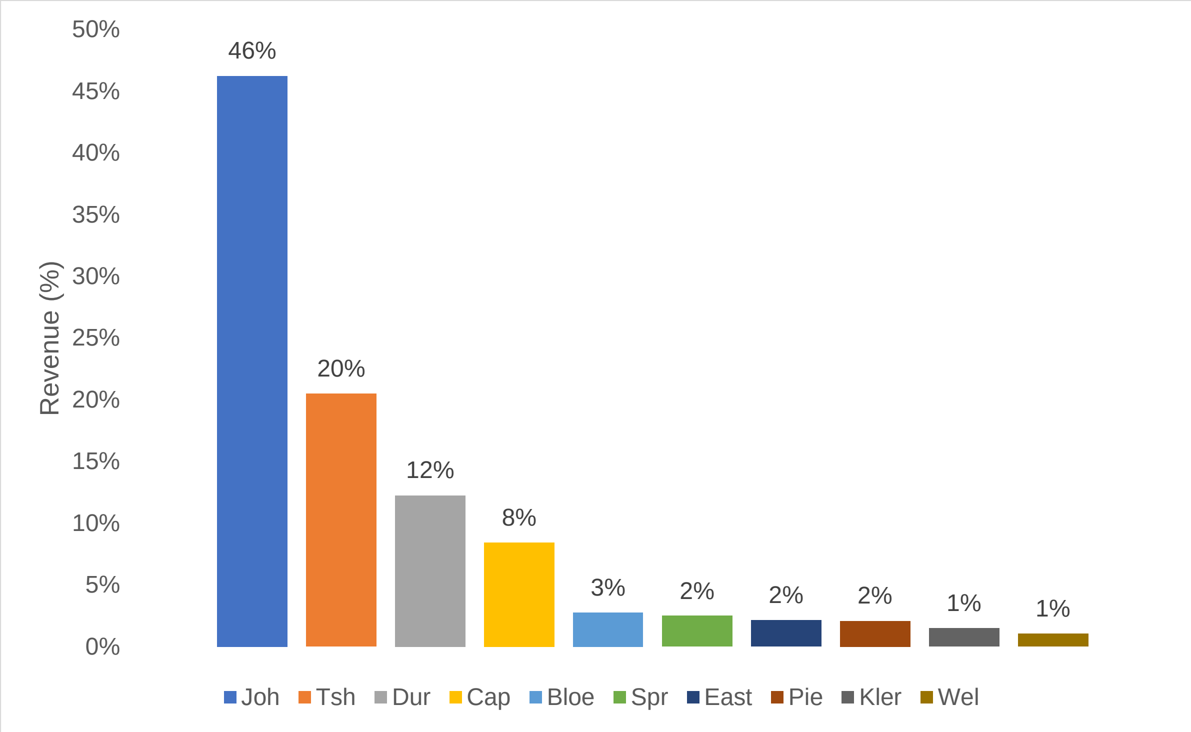
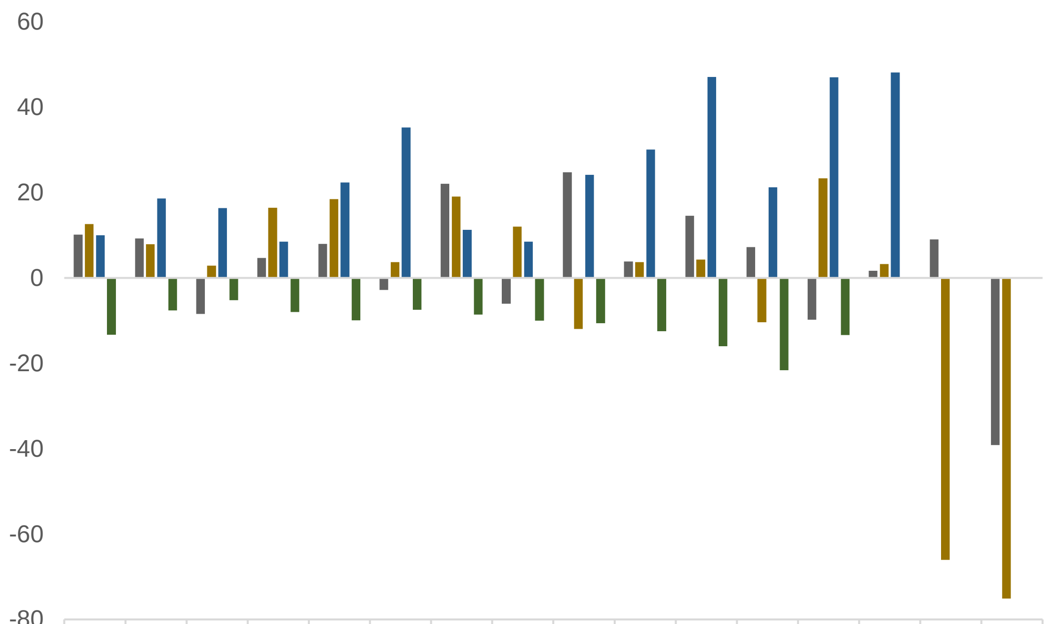


Figure 13: Estimated shares in revenue by top 10 markets for other fruits, February 2022

Source: South African Union of Food Markets (2022)

3.7 PRICES

The prices of agricultural products traded in the NFPM system fluctuate owing to a variety of variables. These determinants include, among other things, perishability, product replacement, consumer habits, per capita income, and climatic variance, which impact seasonal output and input-output prices. Figure 14 depicts price changes measured in percentages for the top four agricultural commodities by fresh produce market, comparing February 2021 and 2022. Tomatoes have commanded the highest price changes ascribed to heavy rains and pest attacks leading to reduced volumes to the market. The opposite is true for bananas over the reported period. Umtata fresh produce market showed the most significant decline in prices. This market specialises in two key commodities (potatoes and onions) which indicate poor performance due to lack of product variety.



	Joh	Tsh	Cap	Dur	Eas	Pie	Spr	Por	Kle	Blo	Ver	Wel	Wit	Kim	Nel	Umt
Potatoes	10	9	-8	5	8	-3	22	-6	25	4	15	7	-10	2	9	-39
Onions	13	8	3	16	18	4	19	12	-12	4	4	-10	23	3	-66	-75
Tomatoes	10	19	16	9	22	35	11	8	24	30	47	21	47	48	0	0
Bananas	-13	-8	-5	-8	-10	-7	-9	-10	-11	-12	-16	-22	-13	0	0	0

Figure 14: Price trends for top four traded agricultural products in February 2022

Source: South African Union of Food Markets (2022)

4. CONCLUSION

The purpose of this report was to track market access for smallholder farmers in NFPMs by showing the ideal performance measured based on 30% share of each traded agricultural product as recommended in the NAMC Section 7 committee report published in 2006. For February 2022, total mass traded from the fresh produce market system was 246 222 metric tons (MT), generating a total revenue of R1.49 billion. Thirty percent (smallholder share) of this was estimated at 73 867 MT matched by R449 million. Potatoes commanded the largest share at 26 758 MT (R89 million), followed by onions at 9 566 MT (R33 million), tomatoes at 4 746 MT (R51 million) and bananas at 6 502 MT (R47 million). Other vegetables and fruits were at 14 869 MT (R75 million) and 13 424 (R140 million), respectively. The average price measured in rands per ton varied due to among other things, perishability, product replacement, consumer habits, per capita income, and climatic variance, which impacts seasonal output. Tomatoes have commanded the highest price changes ascribed to heavy rains and pest attacks leading to reduced volumes to the market. The opposite is true for bananas over the reported period. Umtata fresh produce market showed the most significant decline in prices as market specialises in two key commodities which indicate poor performance due to lack of product variety. The manner in which these estimates are currently derived imply that much effort is still required for market inclusion and transformation of the fresh produce market industry by establishing more black-market agents and improve tracking of actual sales from smallholder farmers.

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