SMALLHOLDER MARKET ACCESS ESTIMATES

July 2022

National Agricultural Marketing Council

www.namc.co.za

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ABBREVIATIONS

For the purpose of this report the following acronyms are used:

- NFPM National Fresh Produce Market
- FPM Fresh Produce Market
- SAUFM South African Union of Food Markets
- NAMC National Agricultural Marketing Council
- GP Gauteng
- WC Western Cape
- KZN Kwa-Zulu Natal
- NW North West
- MP Mpumalanga
- EC Eastern Cape
- FS Free Sate
- Joh Johannesburg
- Tsh Tshwane
- Cap Cape Town
- eTh eThekwini
- Eku Ekurhuleni
- Man Mangaung
- Matl Matlosana
- Mat Matjhabeng
- Buf Buffalo City
- Gqe Gqeberha
- MT Metric Tons

1. BACKGROUND

This report provides estimates of an ideal performance of smallholder farmers in the NFPMs in South Africa during July 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 vegetables and fruits traded in the system. Monthly data for these commodities were obtained from the SAUFM.

2. OVERVIEW OF THE MONTH – JUL 22

In July 2022 the total mass traded from the NFPMs was 270 498 MT, generating a total revenue of R1.59 billion (see Table 1). This indicates 0.37% (984 MT) and 3.41% (R52 million) growth compared to the same month during the previous year. The growth of revenue and mass 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 July 2022

Commodity	Revenue	Mass
Total	R1 586 380 681	270 498
Potatoes	R398 176 653	88 040
Onions	R177 608 031	31 225
Tomatoes	R173 365 502	17 916
Bananas	R134 023 836	24 409
Other vegetables	R374 956 390	54 159
Other fruit	R328 200 268	54 749

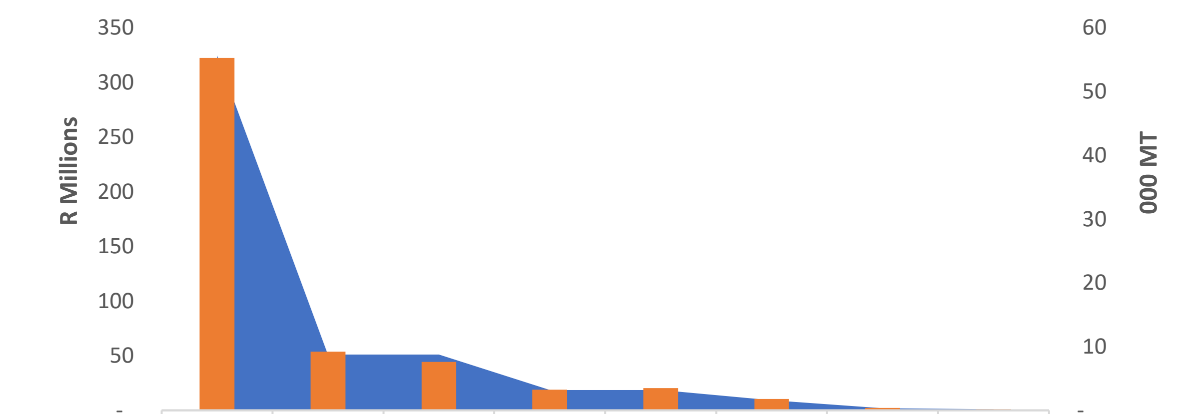
Source: SAUFM (2022)

Potatoes had a total mass of 88 040 MT, indicating an increase of 4% compared to the same month in the previous year. Their revenue declined by 16% during the same period to reach

R398 million. The total mass for onions decreased by 13% (4 606 MT) to reach 31 225 MT in July 2022. The revenue also grew by 13% (R20 million) to reach R177 608 031. Tomatoes had a total mass of 17 916 MT, indicating a decrease by 28% (translated as 6 867 MT). This traded mass was matched by a total revenue of R173 million, indicating 17% increase. Bananas showed a massive increase of 54% (8 562 MT) in mass traded, matched by increase of R19 165 637 in revenue to reach R134 million in July 2022. Other vegetables traded in the system recorded a decrease of 13% (8 069 MT) in mass matched by an increase of 15% (R48 million) in revenue. The other fruits recorded an increase of 18% (8 523 MT) to reach a total traded mass of 54 749 MT in July 2022. The revenue of these fruits also grew by 4% (R13 million) to reach R328 million over the reported period.

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	EC	FS	NW	MP	NC
Revenue	324641 0	51152 73	50898 75	18694 54	18673 67	9125 753	1828 901	898 816
Mass	55 290	9 199	7 592	3 259	3 467	1 805	377	161

Figure 1: Summary of estimated share of smallholder farmers in different provinces by revenue and mass, July 2022
Source: SAUFM (2022)

For the entire month of July 2022, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 81 149 MT and R475 914 204 million, respectively. A further analysis of this at the provincial level show that GP was leading at 55 290 MT (translated as 68%) matched by a revenue of R324 million (also interpreted as 68%) (See Figure 1). This was followed by KZN at 9 199 MT (R51 million), WC at 7 592 MT (R50 million), EC at 3 259 MT (R18 million), FS at 3 467 MT (R18 million), NW at 1 805 MT (R9 million) and MP at 377 MT (R1.83 million). The NC province had the lowest share of 161 MT (R898 816) from smallholder farmers over the period under review.

In terms of market analysis, the Johannesburg market commanded the list of the top ten fresh produce markets at 36 557 MT (R220 million), Tshwane at 15 266 MT (R87 million), Cape Town at 7 592 MT (R50 million), eThekwini at 7 650 MT (R43 million), Ekurhuleni at 3 026 MT (R14 million), Mangaung at 2 156 MT (R11.9 million), Buffalo City at 2 026 MT (R11.6 million), Matlosana at 1 805 MT (R9 million), Msunduzi at 1 549 MT (R7 million) and Gqeberha 1 197 MT (R6 million) (see table 2).

Table 2: Estimated share of smallholder markets by market measured by revenue and mass in July 2022

Market	Revenue	Mass (MT)
Johannesburg	220 939 717	36 557
Tshwane	87 183 252	15 266
Cape Town	50 898 752	7 592
eThekwini	43 701 271	7 650
Ekurhuleni	14 598 379	3 026
Mangaung	11 971 600	2 156
Buffalo City	11 605 917	2 026
Matlosana	9 125 753	1 805
Msunduzi	7 451 466	1 549
Gqeberha	6 962 050	1 197
Matjhabeng	6 702 079	1 312
Vereeniging	1 919 674	441
eMalahleni	1 228 131	254
Sol Plaatje	898 816	161
Mbombela	600 770	123
Kei	126 579	35

Source: SAUFM (2022)

3.1 POTATOES

Potatoes remain the largest traded agricultural product in the fresh produce market system in South Africa. The highest estimated market share of smallholder farmers in potatoes was observed in GP at R77 million derived from 17 496 MT (see Table 3). This was followed by KZN at R13 million (2 996 MT), WC at R11 million (2 242 MT), EC at R7 million (1 127 MT), FS at R5 million (1 466 MT) and NW at R3 million (806 MT), MP at R1.12 million (235 MT). The NC at R192 947 (44 MT), respectively. The overall share in potatoes was R119 million (26 412 MT).

Table 3: Summary of estimated share of smallholder farmers in potatoes at provincial level, July 2022

Province	Revenue	Mass
GP	R77 627 413	17 496
KZN	R13 186 273	2 996
WC	R11 550 699	2 242
EC	R7 024 005	1 127
FS	R5 371 149	1 466
NW	R3 379 862	806
MP	R1 120 647	235
NC	R192 947	44

Source: SAUFM (2022)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 11 092 MT (42%), followed by Tshwane at 4 817 MT (18%), eThekwini at 2 336 MT (9%), Cape Town at 2 242 MT (8%) and Ekurhuleni at 1 330 MT (5%). Other markets in the top ten included Buffalo City (823 MT), Matlosana (806 MT), Msunduzi (661 MT) all at 3%. The Mangaung (624 MT) and Gqeberha (618 MT) had the least share in potatoes among the top ten markets at 2%.

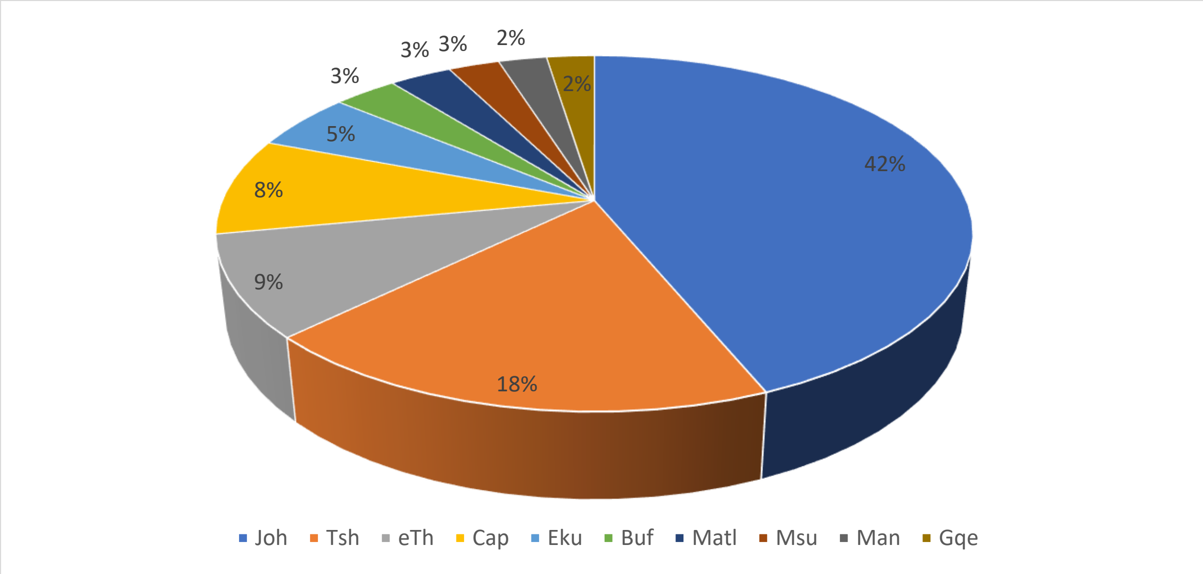


Figure 2: Estimated share in top 10 markets by mass for potatoes, July 2022

Source: SAUFM (2022)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R48 million (41%) followed by Tshwane at R21 million (18%), Cape Town at R11 million (10%), eThekwini at R10 million (9%) and Ekurhuleni at R5 million (5%). The Buffalo City (R3.95 million), Matlosana (R3.38 million) and Mangaung (R3.07 million) had the same share at 3%. Gqeberha (2.97 million) and Msunduzi (R2.74 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

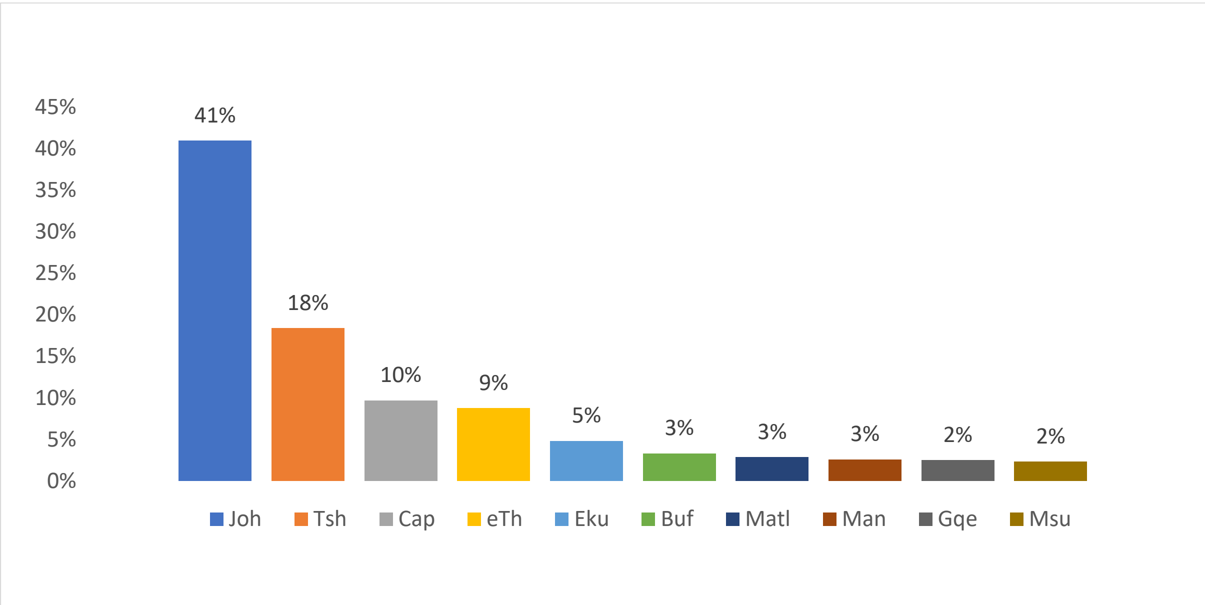


Figure 3: Estimated shares in revenue by top 10 markets for potatoes, July 2022

Source: SAUFM (2022)

3.2 ONIONS

Table 4 presents onions estimated share of smallholder farmers in eight provinces. The GP was the leading province with R36 million in revenue, derived from 6 810 MT in mass, followed by KZN at R6 million (1 044 MT), WC at R4 million (737 MT), EC at R2 million (352 MT), FS at R1 million (263 MT), NW) at R621 180 (121 MT) and MP at R149 197 (30 MT).

The NC at R54 117 (11 MT) had the lowest share of smallholder farmers in onions. The overall share was R53 million and 9 368 MT.

Table 4: Summary of estimated share of smallholder farmers in onions at provincial level, July 2022

Province	Revenue	Mass
GP	R36 757 611	6 810
KZN	R6 870 989	1 044
WC	R4 867 251	737
EC	R2 383 050	352
FS	R1 579 015	263
NW	R621 180	121
MP	R149 197	30
NC	R54 117	11

Source: SAUFM (2022)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in July 2022. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 4 943 MT (53%). It was followed by Tshwane at 1 614 MT (17%), eThekwini at 930 MT (10%), Cape Town at 737 MT (8%), and Ekurhuleni at 236 MT (3%). Other markets included Buffalo City (204 MT), Mangaung (170 MT) and Gqeberha (148 MT) all at 2%. Matlosana (121 MT) and Msunduzi (114 MT) had the least share of smallholder farmers in onions among the top ten markets at 1%.

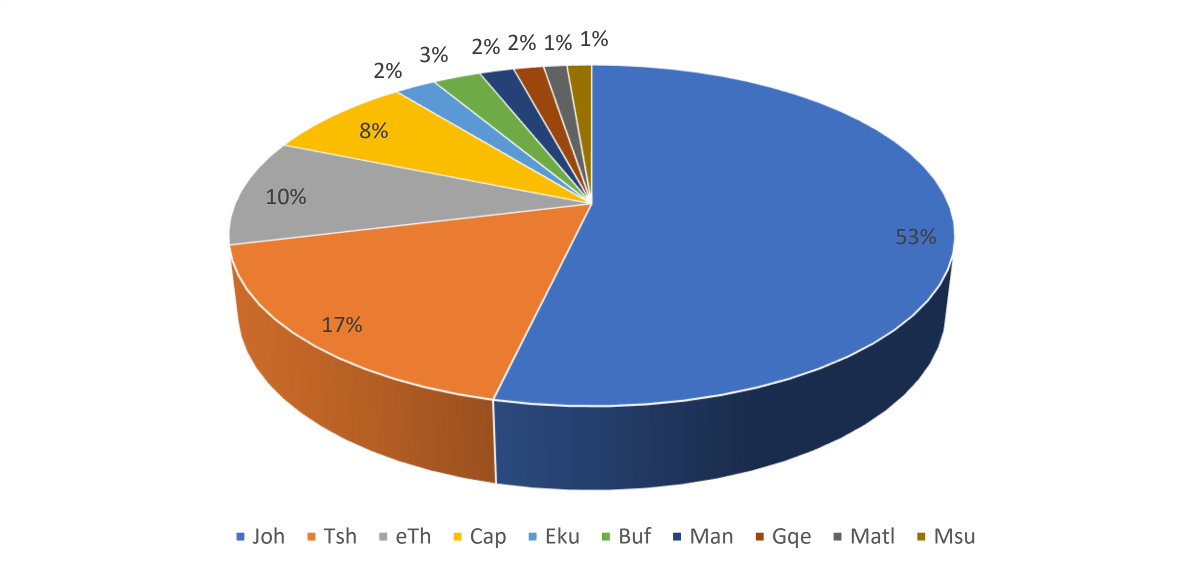


Figure 4: Estimated shares in top 10 markets by mass for onions, July 2022

Source: SAUFM (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 50% (R26 million), followed by Tshwane at 16% (R8 million), eThekwini at 12% (R6 million), Cape Town at 9% (R4 million) and Buffalo City at 3% (R1.40 million). The Ekurhuleni (R1.21 million), Mangaung (R1.06 million), Gqeberha (R981 907) all at 2%. The Msunduzi (R679 800) and Matlosana (R621 179) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

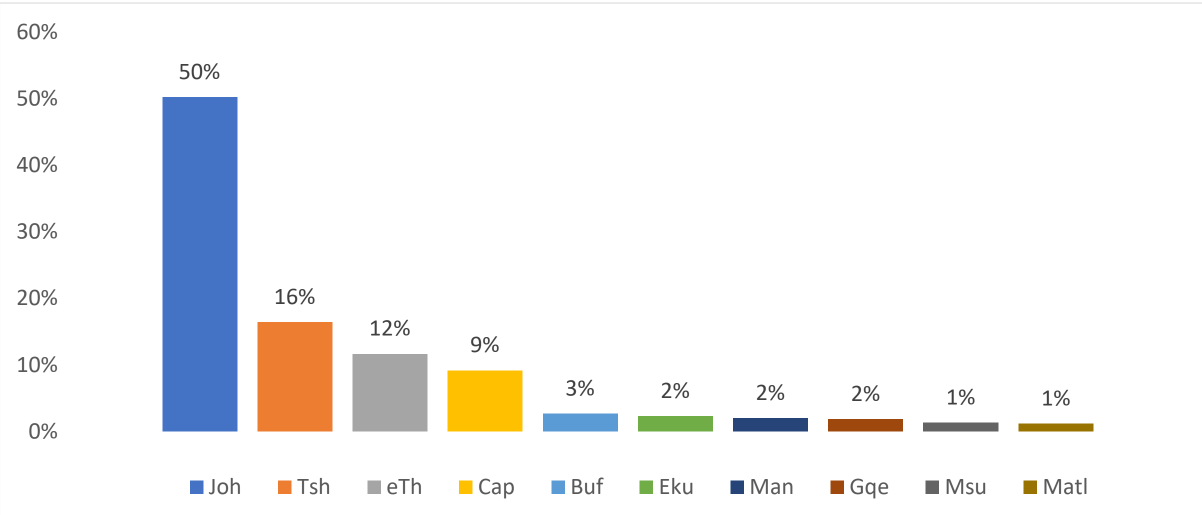


Figure 5: Estimated shares in revenue by top 10 markets for onions, July 2022

Source: SAUFM (2022)

3.3 TOMATOES

Table 5 presents tomatoes estimated share of smallholder farmers in eight provinces of South Africa. The GP was the leading province at R35 million in revenue derived from a total mass of 3 674 MT, followed by KZN at R6 million (746 MT), WC at R4 million (417 MT), EC at R2 million (250 MT), FS at R1.50 million (138 MT), NW at R1.14 million (105 MT) and MP at R338 934 (33 MT). The NC province was at R92 585 (11 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 R52 million and 5 375 MT.

Table 5: Summary of estimated share of smallholder farmers in tomatoes at provincial level, July 2022

Province	Revenue	Mass
GP	R35 975 890	3674
KZN	R6 071 343	746
WC	R4 288 964	417
EC	R2 593 993	250
FS	R1 503 132	138
NW	R1 144 809	105
MP	R338 934	33
NC	R92 585	11

Source: SAUFM (2022)

Tomatoes were the fourth largest traded commodity in terms of mass at fresh produce markets in July 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 49%, translated as 2 651 MT (see Figure 6). This market was followed by Tshwane at 805 MT (15%), Cape Town at 746 MT (14%), eThekwini at 380 MT (7%), Ekurhuleni at 4% (199 MT) and Mangaung at 3% (149 MT). Other markets among the top ten included Matlosana (105 MT) and Matjhabeng (101 MT) both at 2% while Buffalo City (79 MT) at 1%. The Gqeberha (59 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 1%.

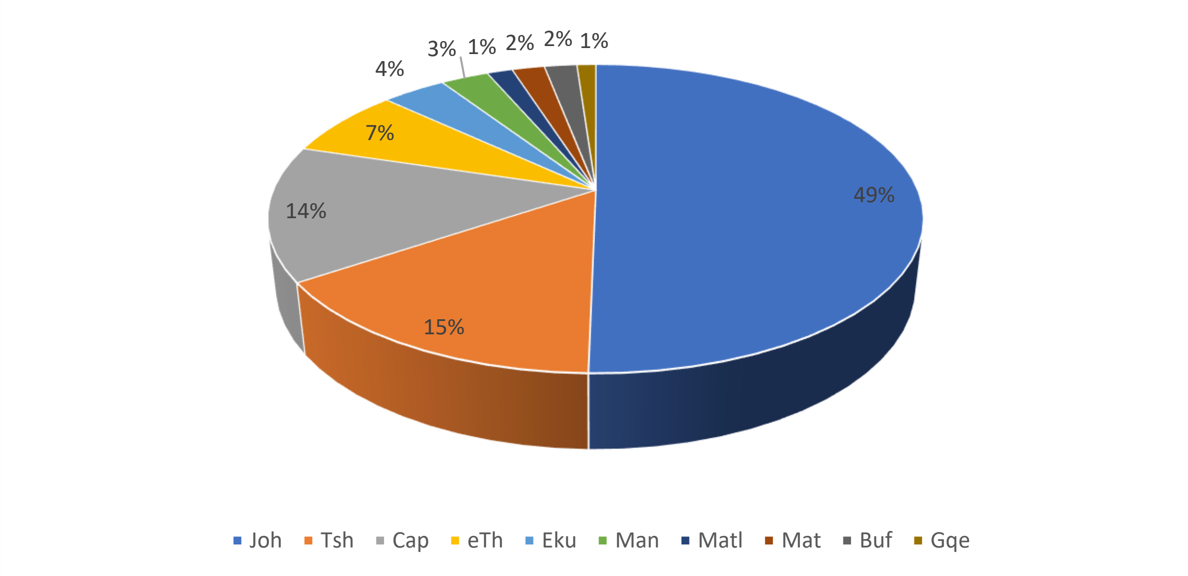


Figure 6: Estimated share in top 10 markets by mass for tomatoes, July 2022

Source: SAUFM (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 50% (R25 million), Tshwane at 16% (R8 million), Cape Town at 12% (R6 million), eThekwini at 8% (R3 million), Ekurhuleni at R1.64 million (3%) and Mangaung at 3% (R1.54 million). The Matlosana (R1.14 million), Matjhabeng (R1.05 million) and Buffalo City (R795 798) had the same share at 2%. Gqeberha (R707 333) had the lowest share of smallholder farmers in tomatoes among the top ten markets.

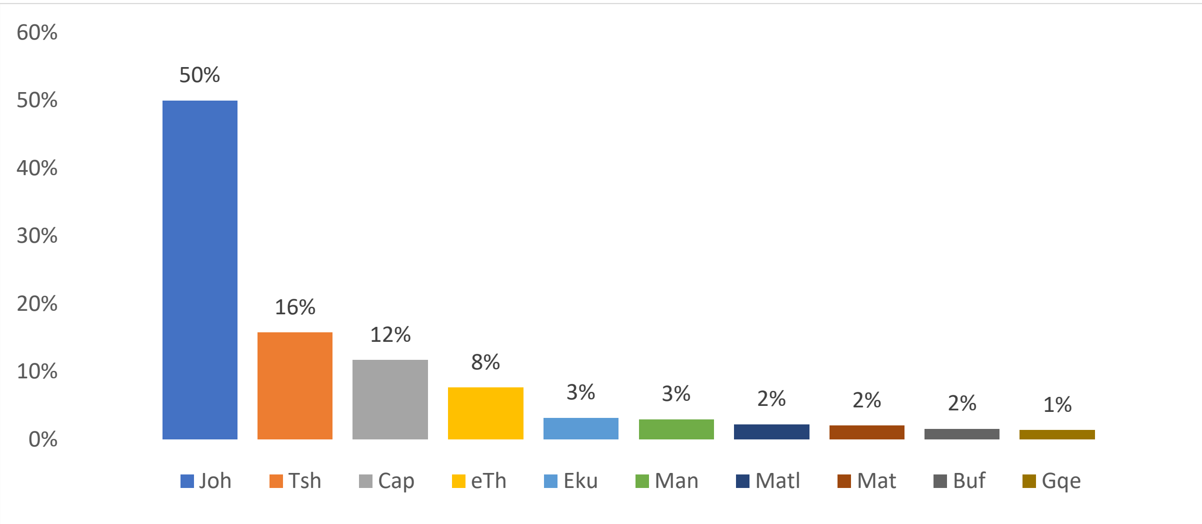


Figure 7: Estimated share in revenue by top 10 markets for tomatoes, July 2022

Source: SAUFM (2022)

3.4 BANANAS

Table 6 presents bananas estimated share of smallholder farmers in eight provinces of South Africa. The GP was the leading province led at R22 million derived from a total mass of 4 083 MT, followed by KZN at R6.26 million (1 256 MT), WC at R6.21 million (1 090 MT), EC at R2 million (435 MT), FS at R1 million (304 MT) and NW at R738 539 (126 MT).

The share of smallholder farmers in bananas in MP was estimated at R156 900 (28 MT) while NC had the lowest estimated share of smallholder farmers in tomatoes at R3 026 over the reported month. The estimated overall smallholder share for bananas was R40 million and 7 323 MT.

Table 6: Summary of estimated share of smallholder farmers in bananas at provincial level, July 2022

Province	Revenue	Mass
GP	R22 229 567	4 083
KZN	R6 263 151	1 256
WC	R6 216 759	1 090
EC	R2 901 983	435
FS	R1 697 228	304
NW	R738 539	126
MP	R156 900	28
NC	R3 026	1

Source: SAUFM (2022)

Bananas constituted the most traded fruit on the fresh produce market system in July 2022. The Johannesburg market commanded the largest share of smallholder farmers at 31% (2 291 MT) (see Figure 8). It was followed by Tshwane at 21% (1 508 MT), Cape Town at 15% (1 090 MT), eThekwini at 15% (977 MT) with Buffalo City (300 MT) and Msunduzi (279 MT) at 4% while Ekurhuleni (236 MT) and Mangaung (205 MT) were both at 3%. The Gqeberha stood at

2% (135 MT). Among the top ten markets Matlosana fresh produce market (126 MT) commanded the least estimated share of smallholder farmers at 2%.

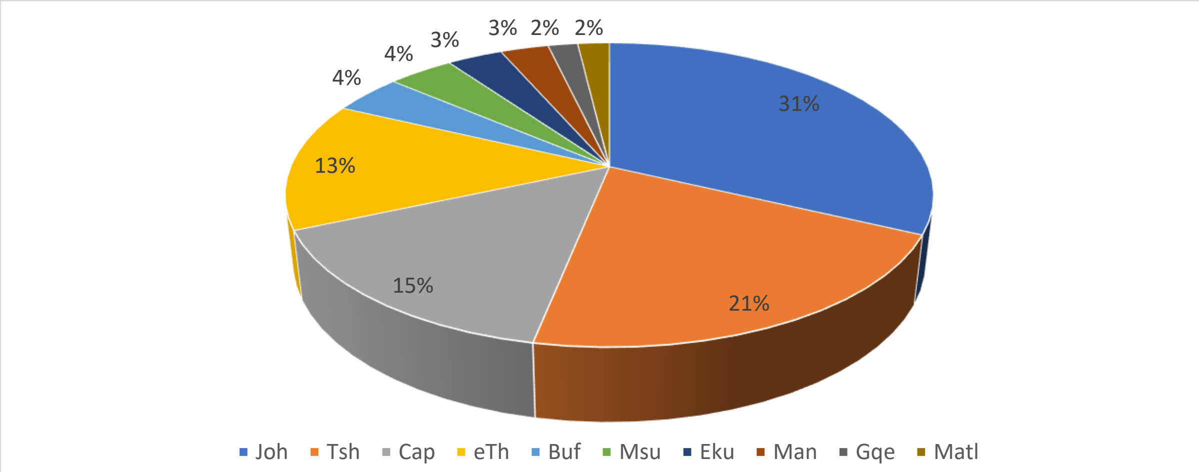


Figure 8: Estimated shares in top 10 markets by mass for bananas, July 2022

Source: SAUFM (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 31% (R12 million) followed by Tshwane at 21% (R8 million), Cape Town at 16% (R6 million), eThekwini at 12% (R4 million), Buffalo City at 5% (R1.89 million) and Msunduzi at 3% (R1.35 million). The Mangaung (R1.14 million), Ekurhuleni (R1.08 million) and Gqeberha (R1.02 million) were at 3%. Among the top ten Matlosana fresh produce market had the least share at 2% (R738 538 million).

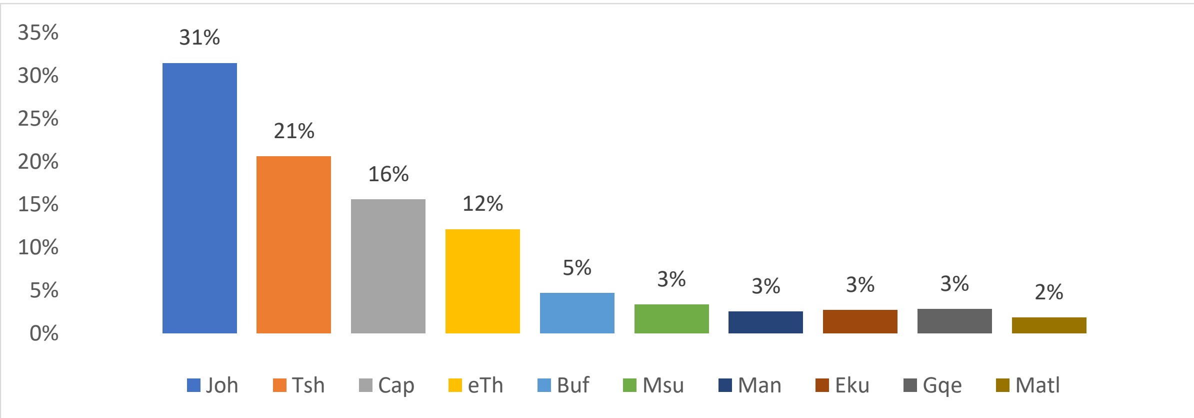


Figure 9: Estimated shares revenue by in top 10 markets for bananas, July 2022

Source: SAUFM (2022)

3.5 OTHER VEGETABLES

Table 7 presents the other vegetables estimated share of smallholder farmers in eight provinces in South Africa. The GP was the leading province with revenue of R82 million derived from a total mass of 11 994 MT. This market was followed by KZN at R13 million (1 559 MT), WC R8 million (1 091 MT), EC at R2 million (712 MT), FS at R3 million (476 MT), and North West at R1 million (322 MT).

The MP had an estimated share of other vegetables at R83 767 (42 MT) while NC stood at R147 498 (53 MT). The overall share of smallholder farmers in other vegetables in July 2022 was R112 million and 16 248 MT.

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

Province	Revenue	Mass
GP	R82 333 444	11 994
KZN	R13 250 417	1 559
WC	R8 399 181	1 091
EC	R2 957 908	712
FS	R3 533 473	476
NW	R1 624 396	322
MP	R83 767	42
NC	R147 498	53

Source: SAUFM (2022)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in July 2022 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 50% (8 167 MT) (see Figure 10), followed by Tshwane at 21% (3 417 MT), Cape Town at 10% (1 559 MT), eThekwini at 6% (997 MT) and Mangaung at 3% (500 MT). The Ekurhuleni (388 MT), Buffalo City (322 MT) and Matlosana (267 MT) had the same share at 2% while Matjhabeng was at 1% (212 MT). The Gqeberha commanded the lowest share of smallholder farmers among the top ten markets both at 1% (206 MT).

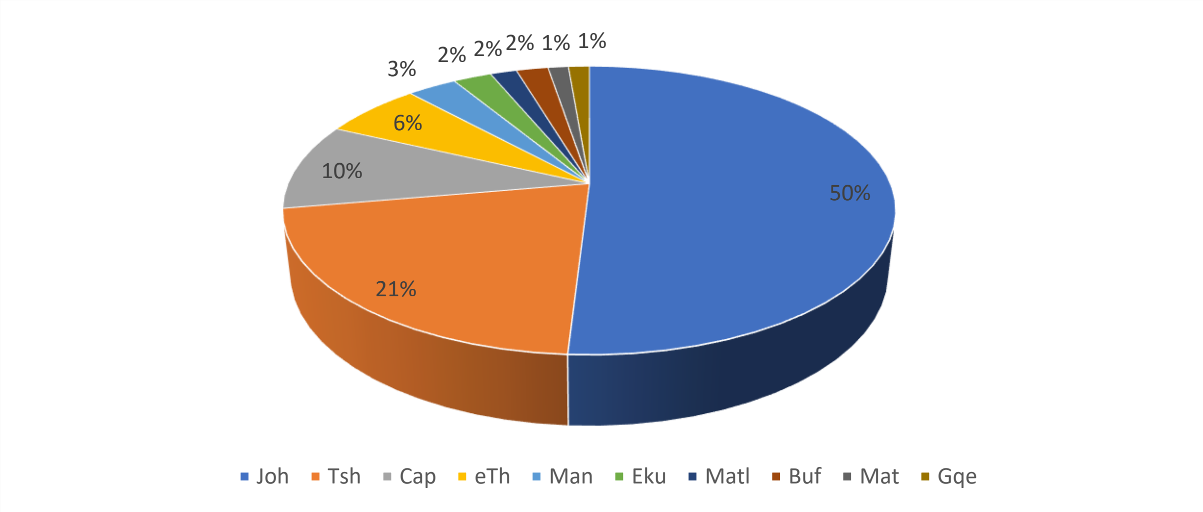


Figure 10: Estimated shares in top 10 markets by mass for other vegetables, June 2022

Source: SAUFM (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% (R59 million), Tshwane at 19% (R21 million), Cape Town 12% (R13 million), eThekwini at 7% (R7 million) with Mangaung at 2% (R2 million), Ekurhuleni (R1.96 million) and Buffalo City (R1.83 million) also at 2% while Matlosana (R1.62 million) and Gqeberha (R1.11 million) stood at 1%. The Matjhabeng had the least share of revenue for smallholder farmers among the top ten markets at 1% (R1 million).

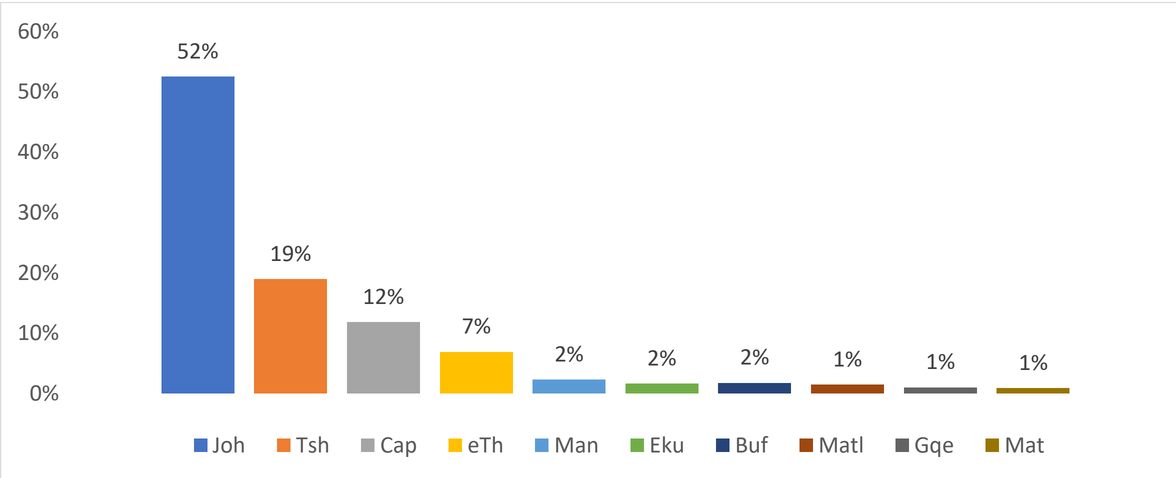


Figure 11: Estimated shares in revenue by markets for other vegetables, June 2022

Source: SAUFM (2022)

3.6 OTHER FRUITS

Table 8 presents the other fruits estimated share of smallholder farmers in eight provinces in South Africa during July 2022. The GP province was leading with a revenue of R69 million derived from a total mass of 11 232 MT, followed KZN at R12 million (2 395 MT), WC at R8 million (1 219 MT), EC at R3 million (811 MT), FS at R1.92 million (393 MT) and NW at R1 million (324 MT).

The NC province had R147 498 (30 MT) while MP commanded the lowest estimated share of smallholder farmers in other fruits R83 767 (20 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R98 million matched by 16 425 MT.

Table 8: Summary of estimated share of smallholder farmers in other fruits at provincial level, July 2022

Province	Revenue (R)	Mass (MT)
GP	R69 702 096	11 232
KZN	R12 190 572	2 395
WC	R8 895 891	1 219
EC	R3 898 820	811
FS	R1 924 468	393
NW	R1 616 968	324
MP	R83 767	20
NC	R147 498	30

Source: SAUFM (2022)

Market shares for other fruits traded in the various fresh produce markets in July 2022 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 45% (7 414 MT) (see Figure 12), followed by Tshwane at 19% (3 104 MT), eThekwini at 12% (2 031 MT), Cape Town at 7% (1 219 MT), Ekurhuleni at 4% (637 MT) and Mangaung (507 MT) at 3%. Other markets had the same share at 2% and they included Msunduzi (364 MT), Buffalo City (353 MT) and Matlosana (324 MT). Matjhabeng fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 2% (304 MT).

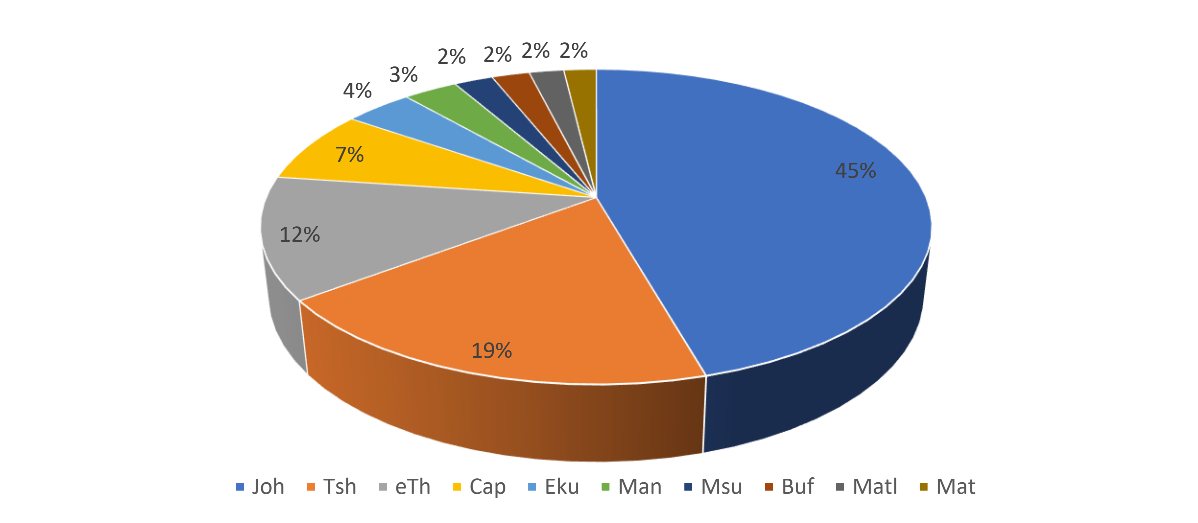


Figure 12: Estimated shares in top 10 markets by mass for other fruits, July 2022

Source: SAUFM (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 48% (R47 million), Tshwane at 19% (R18 million), eThekwini at 11% (R10 million), Cape Town at 9% (R8 million) with Ekurhuleni (R2.95 million) and Mangaung (R2.64 million) both at 3%. The Buffalo City (R1.74 million), Msunduzi (R1.67 million), Matlosana (R1.61 million) had the same share at 2%. Matjhabeng had the lowest share of smallholder farmers among the top ten fresh produce markets at 1% (R1.26 million).

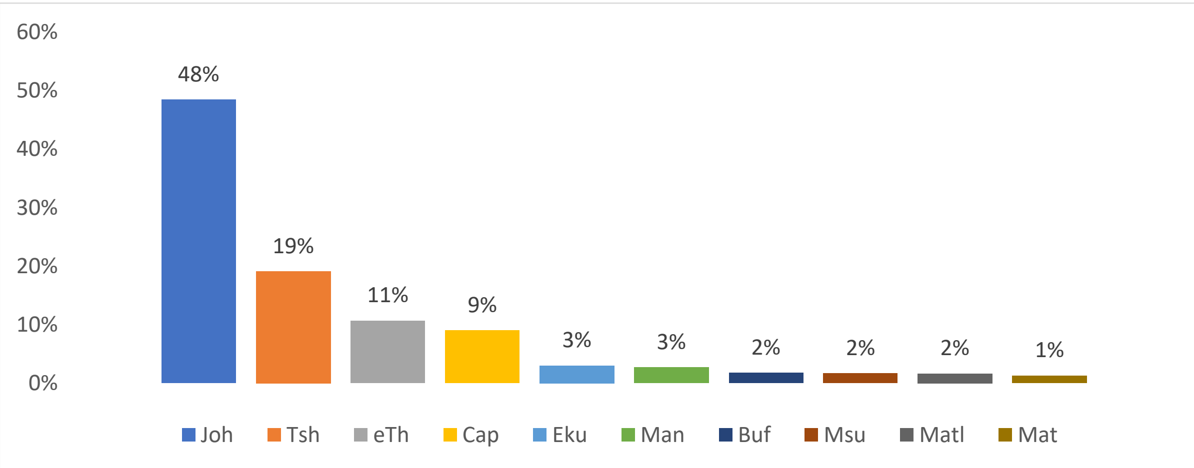
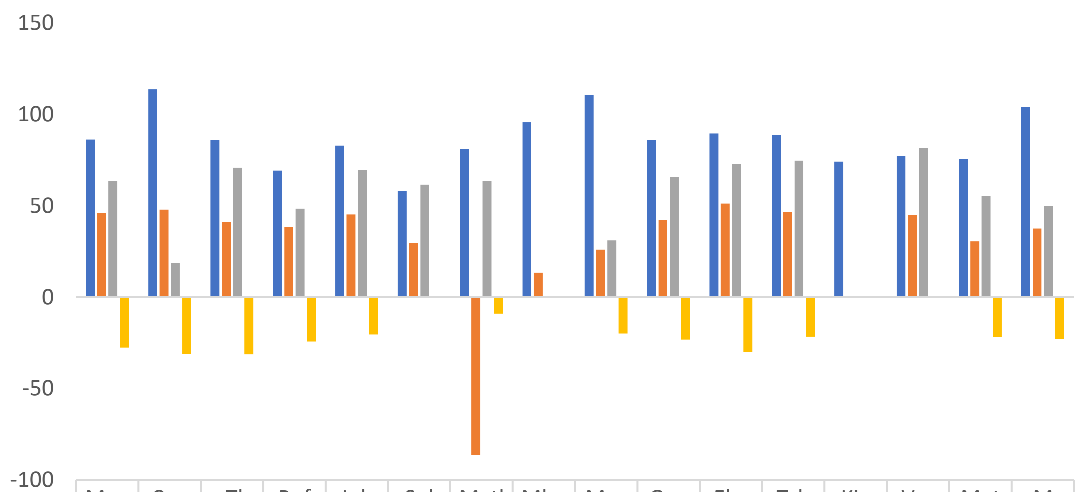


Figure 13: Estimated shares in revenue by top 10 markets for other fruits, July 2022

Source: SAUFM (2022)

3.7 PRICES

The prices of agricultural products traded in the NFPM system fluctuate owing to a variety of variables. These variables include amongst 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 July 2021 and 2022. The average price for potatoes increased by 87% and the increased ranged from 58% in Sol Plaatjie to 111% in Msunduzi. The average price increase for onions was 30% and this ranged ranged from -86% in Matlosana to 51% in Ekurhuleni. The price increase for tomatoes averaged 32% with the lowest price change at 7% in eMalahleni and maximum at 54% in Msunduzi. Finally, bananas had an average price change of -24%, ranging from -31% both in Cape Town and eThekwini and maximum at 0% suggesting no price changes. Overall, all the markets exhibit positive price changes for potatoes and tomatoes. In the case on onion, Matlosana was the only exception. Significant decline in prices were observed for bananas in all the fresh produce markets.



	Man	Cap	eTh	Buf	Joh	Sol	Matl	Mbo	Msu	Gqe	Eku	Tsh	Kie	Ver	Mat	eMa
Potatoes	86	114	86	69	83	58	81	96	111	86	89	89	74	77	76	104
Onions	46	48	41	38	45	29	-86	13	26	42	51	47	0	45	30	38
Tomatoes	64	19	71	48	70	62	64	0	31	66	73	75	0	82	55	50
Bananas	-28	-31	-31	-24	-20	0	-9	0	-20	-23	-30	-22	0	0	-22	-23

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

Source: SAUFM (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 July 2022, the total mass traded in the fresh produce market system was 270 498 MT, generating a total revenue of R1.59 billion. Thirty percent (smallholder share) of this was estimated at 81 149 matched by R475 million in revenue. Gauteng was leading at 55 290 MT (translated as 68%) matched by a revenue of R324 million (also interpreted as 68%). This was followed by KZN at 9 199 MT (R51 million), WC at 7 592 MT (R50 million), EC at 3 259 MT (R18 million), FS at 3 467 MT (R18 million), NW at 1 1 805 MT (R9 million) and MP at 377 MT (R1.83 million). The NC province had the lowest share of 161 MT (R898 816) from smallholder farmers over the period under review.

A further analysis by top 10 fresh produce markets shows that the Johannesburg Market commanded the list of the top ten fresh produce markets at 36 557 MT (R220 million) followed by Tshwane at 15 266 MT (R87 million), Cape Town at 7 592 MT (R50 million), eThekwini at 7 650 MT (R43 million), Ekurhuleni at 3 026 MT (R14 million), Mangaung at 2 156 MT (R11.9 million), Buffalo City at 2 026 MT (R11.6 million), Matlosana at 1 805 MT (R9 million), Msunduzi at 1 549 MT (R7 million) and Gqeberha 1 197 MT (R6 million). By type of agricultural product, potatoes commanded the largest share at R119 million (26 412 MT), followed by onions at R53 million (9 368 MT), tomatoes at R52 million (5 375 MT) and bananas at R40 million (7 323 MT). Other vegetables and fruits were at R112 million (16 248 MT) and R98 million (16 425 MT), respectively.

The price of potatoes and tomatoes measured by Rand per ton increased across all fresh produce markets over the period of study. A similar trend was also observed for onions with Matlosana fresh produce market as the only exception. Prices for bananas declined sharply during the period under review.

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Mr Elvis Nakana
Enquiries: +27 12 341 1115
ENakana@namc.co.za

Compiled by Mr Lindikaya Myeki through the assistance of Ms Khodani Madula, Mr Khathutshelo Rambau and Mr Kayalethu Sotsha.
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GET IN TOUCH

536 Francis Baard Street,
Meintjiesplein Building,
Block A, 4th Floor, Arcadia,
0007

Private Bag X935, Pretoria, 0001

012 341 1115

info@namc.co.za

www.namc.co.za