SMALLHOLDER MARKET ACCESS ESTIMATES

June 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 June 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 – JUN 22

In June 2022 the total mass traded from the NFPMs was 270 467 MT, generating a total revenue of R1.57 billion (see Table 1). This indicates 12% (36 847 MT) and 16% (R254 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 June 2022

Commodity	Revenue	Mass
Total	R1 565 111 572	270 467
Potatoes	R403 523 385	88 336
Onions	R173 521 685	31 179
Tomatoes	R180 037 604	16 231
Bananas	R127 964 540	22 744
Other vegetables	R348 209 025	54 099
Other fruit	R331 855 333	57 878

Source: SAUFM (2022)

Potatoes had a total mass of 88 336 MT, indicating an increase of 22% compared to the same month in the previous year. Their revenue also increased by 0.38% during the same period to reach R403 million. The total mass for onions also increased by 5.64% (4 833 MT) to reach 31 179 MT in June 2022. The revenue also grew by 35% (R10 million) to reach R173 521 685. Tomatoes had a total mass of 16 231 MT, indicating a decrease by -8.68% (translated as 4 790 MT). This traded mass was matched by a total revenue of R180 million, indicating 38% increase. Bananas showed a massive increase of 55% (2 039 MT) in mass traded, matched by decline of R751 395 in revenue to reach R127 million in June 2022. Other vegetables traded in the system recorded an increase of 2.10% (11 799 MT) in mass matched by an increase of 31% (R8 million) in revenue. The other fruits recorded an increase of 26% (3 374 MT) to reach a total traded mass of 57 878 MT in June 2022. The revenue of these fruits also grew by 17% (R29 million) to reach R331 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.

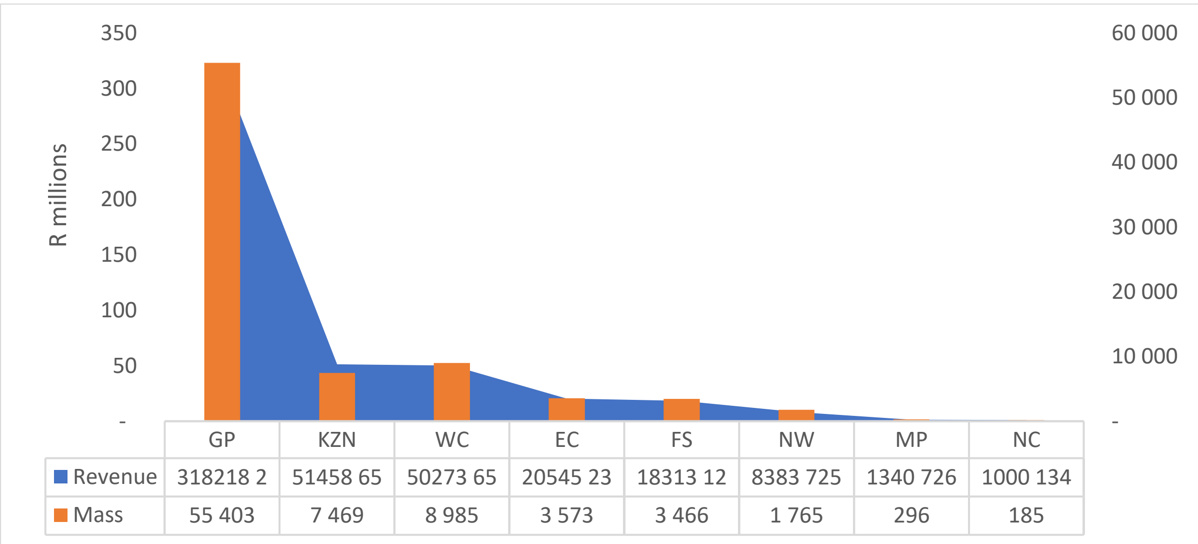


Figure 1: Summary of estimated share of smallholder farmers in different provinces by revenue and mass, June 2022
Source: SAUFM (2022)

For the entire month of June 2022, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 81 140 MT and R469 533 472 million, respectively. A further analysis of this at the provincial level show that GP was leading at 55 403 MT (translated as 68%) matched by a revenue of R318 million (also interpreted as 68%) (See Figure 1). This was followed by KZN at 7 469 MT (R51 million), WC at 8 985 MT (R50 million), EC at 3 573 MT (R20 million), FS at 3 466 MT (R18 million), NW at 1 765 MT (R8 million) and MP at 296 MT (R1.34 million). The NC province had the lowest share of 185 MT (R1 million) 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 36 657 MT (R217 million), Tshwane at 15 175 MT (R84 million), Cape Town at 7 469 MT (R51 million), eThekwini at 7 397 MT (R51 million), Ekurhuleni at 3 143 MT (R14 million), Buffalo City at 2 399 MT (R13 million), Mangaung at 2 116 MT (R11 million), Matlosana at 1 765 MT (R8 million), Msunduzi at 1 589 MT (R7 million) and Matjhabeng at 1 350 MT (R6 million) (see table 2).

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

Market	Revenue	Mass (MT)
Johannesburg	217 720 907	36 657
Tshwane	84 059 066	15 175
Cape Town	51 458 658	7 469
eThekwini	42 794 039	7 397
Ekurhuleni	14 690 095	3 143
Buffalo City	13 909 417	2 399
Mangaung	11 650 858	2 116
Matlosana	8 383 725	1 765
Msunduzi	7 479 613	1 589
Matjhabeng	6 662 268	1 350
Gqeberha	6 590 688	1 160
Vereeniging	1 748 148	428
eMalahleni	1 108 399	248
Sol Plaatje	1 000 134	185
Mbombela	232 328	47
Kei	45 130	14

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 R78 million derived from 17 480 MT (see Table 3). This was followed by KZN at R13 million (2 925 MT), WC at R12 million (2 406 MT), EC at R7 million (1 139 MT), FS at R5 million (1 510 MT) and NW at R3 million (793 MT), MP at R883 615 (191 MT). The NC at R251 489 (57 MT), respectively. The overall share in potatoes was R121 million (26 501 MT).

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

Province	Revenue	Mass
GP	R78 536 928	17 480
KZN	R13 506 699	2 925
WC	R12 323 155	2 406
EC	R7 259 312	1 139
FS	R5 229 067	1 510
NW	R3 066 750	793
MP	R883 615	191
NC	R251 489	57

Source: SAUFM (2022)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 10 985 MT (41%), followed by Tshwane at 4 821 MT (18%), Cape Town at 2 406 MT (9%), eThekwini at 2 316 MT (9%) and Ekurhuleni at 1 419 MT (5%). Other markets in the top ten included Buffalo City (928 MT), Matlosana (793 MT), Mangaung (617 MT) and Msunduzi (609 MT) all at 3%. Gqeberha had the least share in potatoes among the top ten markets at 2% (570 MT).

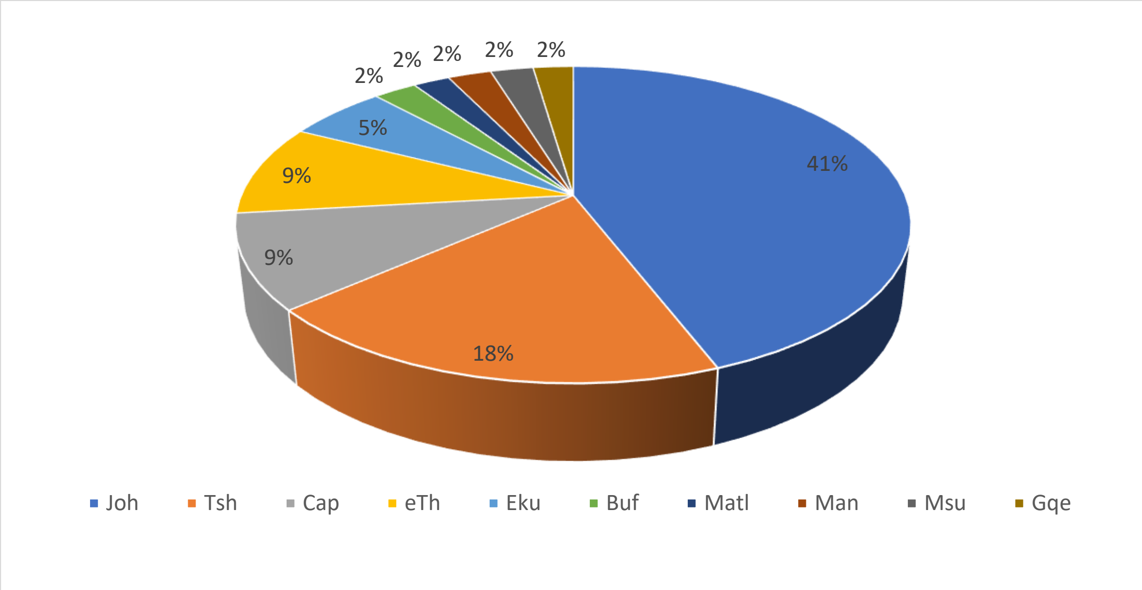


Figure 2: Estimated share in top 10 markets by mass for potatoes, June 2022

Source: SAUFM (2022)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R49 million (41%) followed by Tshwane at R21 million (18%), Cape Town at R12 million (9%), eThekwini at R10 million (9%), Ekurhuleni at R6 million (5%), Buffalo City at R4 million (4%) and Matlosana at R3 million (3%). Other markets in the top ten included Mangaung (R2.91 million) and Gqeberha (2.71 million) at 3%. Msunduzi (R2.55 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

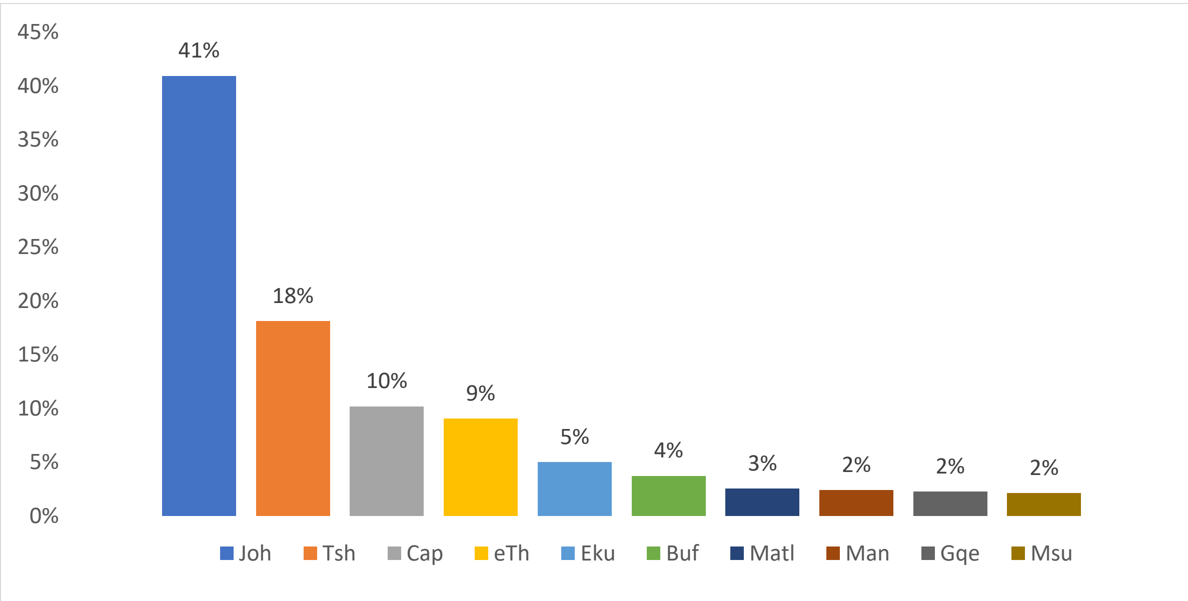


Figure 3: Estimated shares in revenue by top 10 markets for potatoes, June 2022

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 R35 million in revenue, derived from 6 684 MT in mass, followed by KZN at R7 million (1 151 MT), WC at R4 million (724 MT), EC at R2 million (415 MT), FS at R1 million (247 MT), NW) at R565 573 (108 MT) and MP at R77 484 (14 MT).

The NC at R59 535 (10 MT) had the lowest share of smallholder farmers in onions. The overall share was R52 million and 9 354 MT.

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

Province	Revenue	Mass
GP	R35 562 296	6 684
KZN	R7 545 597	1 151
WC	R4 100 323	724
EC	R2 692 789	415
FS	R1 452 909	247
NW	R565 573	108
MP	R77 484	14
NC	R59 535	10

Source: SAUFM (2022)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in June 2022. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 4 842 MT (52%). It was followed by Tshwane at 1 588 MT (17%), eThekwini at 1 037 MT (11%), Cape Town at 724 MT (8%), Buffalo City at 278 MT (3%), Ekurhuleni at 245 MT (3%) and Mangaung at 153 MT (2%). Other markets included Gqeberha (137 MT) and Msunduzi (115 MT) both at 1%. Matlosana (108 MT) had the least share of smallholder farmers in onions among the top ten markets at 1%.

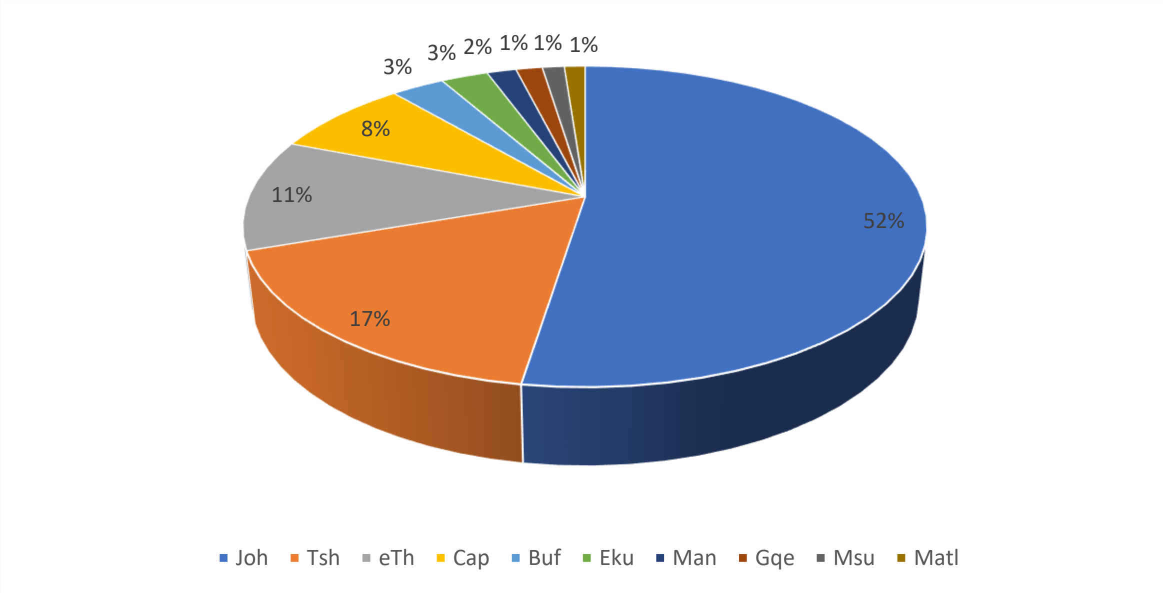


Figure 4: Estimated shares in top 10 markets by mass for onions, June 2022

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 49% (R25 million), followed by Tshwane at 17% (R8 million), eThekwini at 13% (R6 million), Cape Town at 8% (R4 million) and Buffalo City at 3% (R1.79 million). The Ekurhuleni (R1.19 million), Mangaung (R949 102), Gqeberha (R896 232) all at 2%. The Msunduzi (R694 509) and Matlosana (R565 573) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

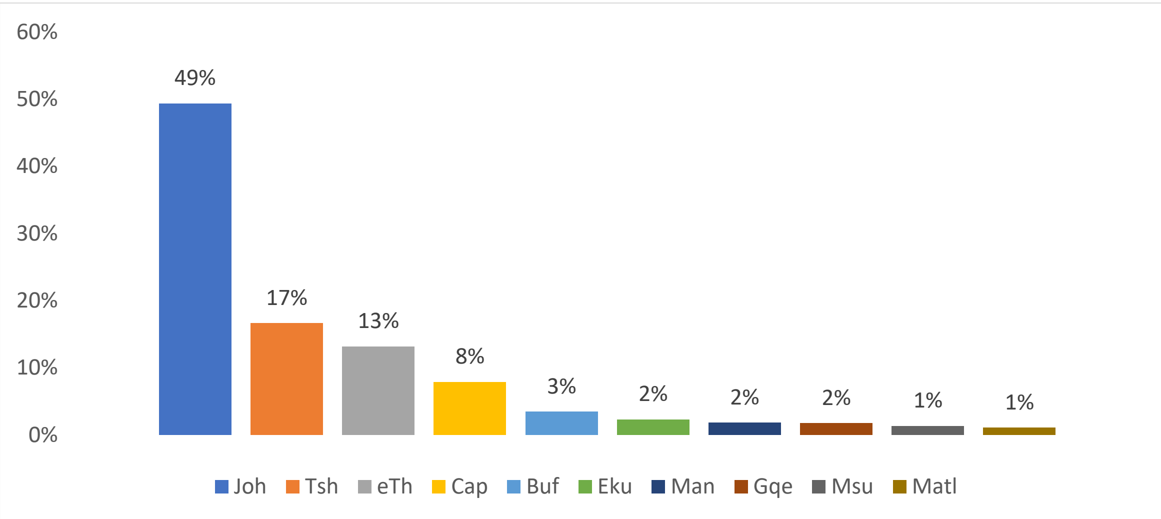


Figure 5: Estimated shares in revenue by top 10 markets for onions, June 2022

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 R37 million in revenue derived from a total mass of 3 393 MT, followed by KZN at R7 million (679 MT), WC at R3 million (326 MT), EC at R2million (200 MT), FS at R1.69 million (161 MT), NW at R1.09 million (82 MT) and MP at R323 194 (26). The NC province was at R15 315 (2MT), 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 4 869 MT.

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

Province	Revenue	Mass
GP	R37 128 973	3393
KZN	R7 279 048	679
WC	R3 836 630	326
EC	R2 638 893	200
FS	R1 692 185	161
NW	R1 097 044	82
MP	R323 194	26
NC	R15 315	2

Source: SAUFM (2022)

Tomatoes were the fourth largest traded commodity in terms of mass at fresh produce markets in June 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 51%, translated as 2 498 MT (see Figure 6). This market was followed by Tshwane at 707 MT (15%), Cape Town also at 679 MT (14%), eThekwini at 301 MT (6%), Ekurhuleni at 4% (175 MT), Mangaung at 3% (124 MT) and Buffalo City at 2% (101 MT). Other markets among the top ten included Matlosana (82 MT) and Matjhabeng (77 MT) both at 2%. The Gqeberha (60 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 1%.

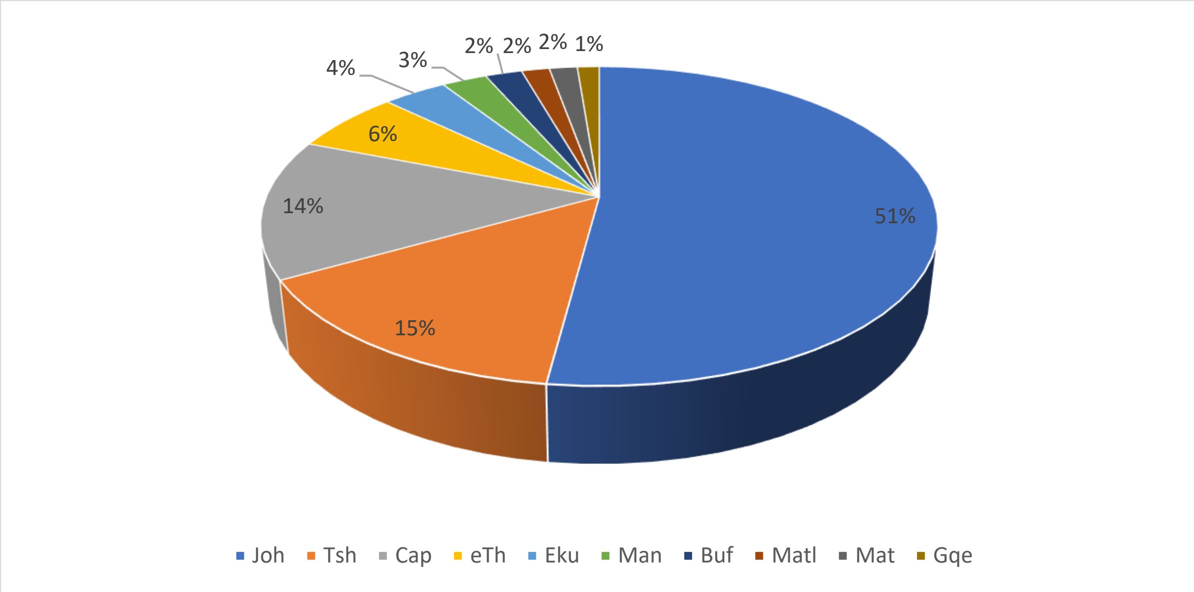


Figure 6: Estimated share in top 10 markets by mass for tomatoes, June 2022

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% (R27 million), Tshwane at 15% (R8 million), Cape Town at 13% (R7 million), eThekwini at 7% (R3 million), Ekurhuleni at R1.72 million (3%) and Mangaung at 3% (R1.59 million). The Matlosana (R1.09 million), Matjhabeng (R1.05 million) and Buffalo City (R1 million) had the same share at 2%. Gqeberha (R685 121) had the lowest share of smallholder farmers in tomatoes among the top ten markets.

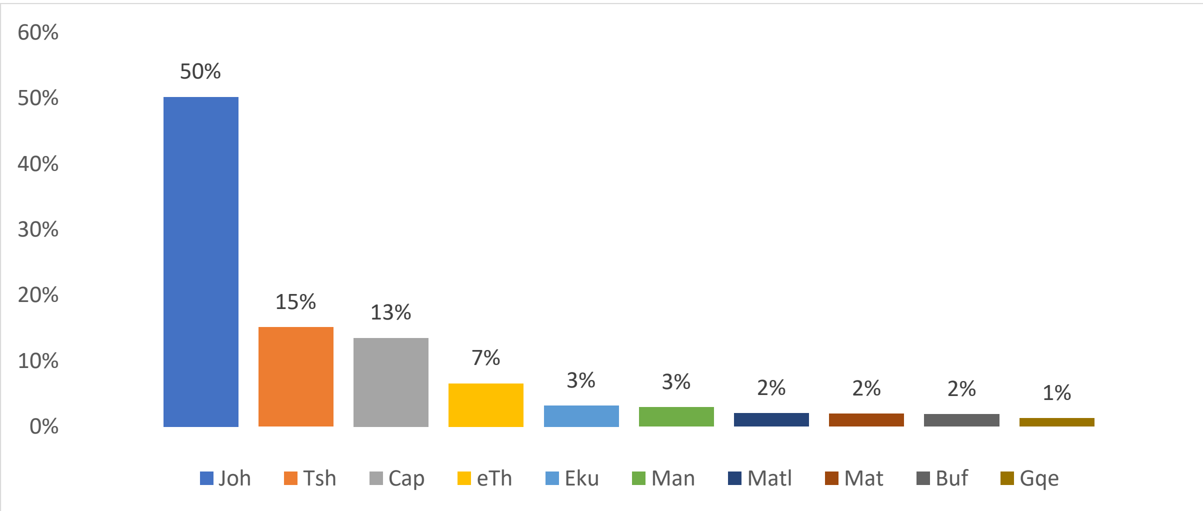


Figure 7: Estimated share in revenue by top 10 markets for tomatoes, June 2022

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 R20 million derived from a total mass of 3 849 MT, followed by KZN at R6 million (1 147 MT), WC at R5 million (903 MT), EC at R3 million (4 68 MT), FS at R1 million (289 MT) and NW at R758 918 (144 MT).

The share of smallholder farmers in bananas in MP was estimated at R125 266 (24 MT) while NC had the lowest estimated share of smallholder farmers in tomatoes at R254 over the reported month. The estimated overall smallholder share for bananas was R38 million and 6 823 MT.

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

Province	Revenue	Mass
GP	R20 228 655	3 849
KZN	R6 320 628	1 147
WC	R5 957 786	903
EC	R3 418 520	468
FS	R1 579 337	289
NW	R758 918	144
MP	R125 266	24
NC	R254	0

Source: SAUFM (2022)

Bananas constituted the most traded fruit on the fresh produce market system in June 2022. The Johannesburg market commanded the largest share of smallholder farmers at 32% (2 168 MT) (see Figure 8). It was followed by Tshwane at 20% (1 383 MT), Cape Town at 13% (903 MT), eThekwini at 12% (850 MT), Ekurhuleni at 5% (335 MT) with Mangaung (297 MT) and

Buffalo City (251 MT) both at 4%. The Matlosana stood (185 MT) and Matjhabeng (144 MT) stood at 3% and 2%, respectively. Among the top ten markets Gqeberha fresh produce market (134 MT) commanded the least estimated share of smallholder farmers at 2%.

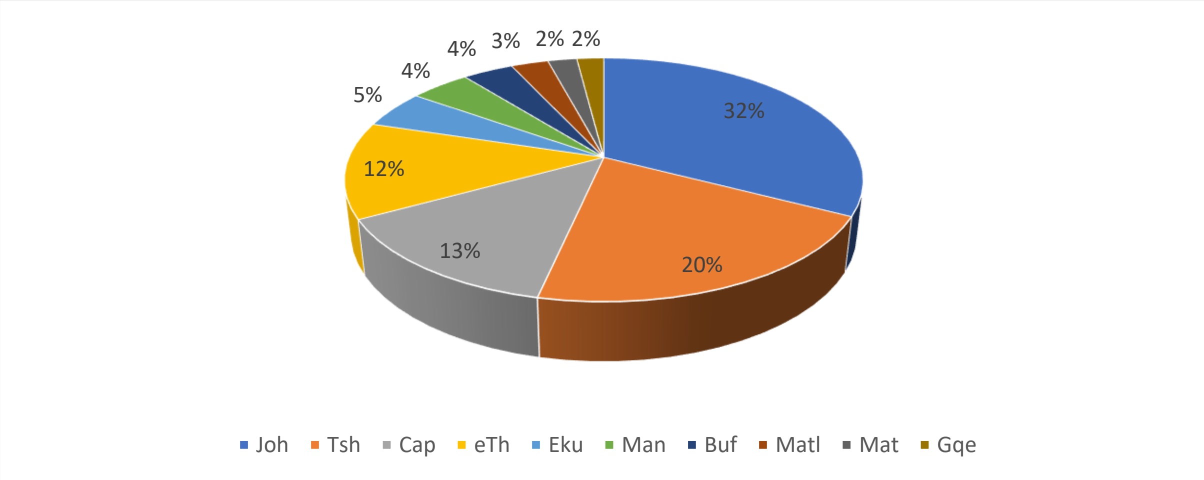


Figure 8: Estimated shares in top 10 markets by mass for bananas, June 2022

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% (R11 million) followed by Tshwane at 19% (R7 million), Cape Town at 16% (R6 million), eThekwini at 12% (R4 million), Buffalo City at 6% (R2 million) and Msunduzi at 4% (R1.36 million). The Gqeberha (R1.06 million), Ekurhuleni (R1.05 million) and Mangaung (R1.02 million) were at 3%. Among the top ten Matlosana fresh produce market had the least share at 2% (R758 917 million).

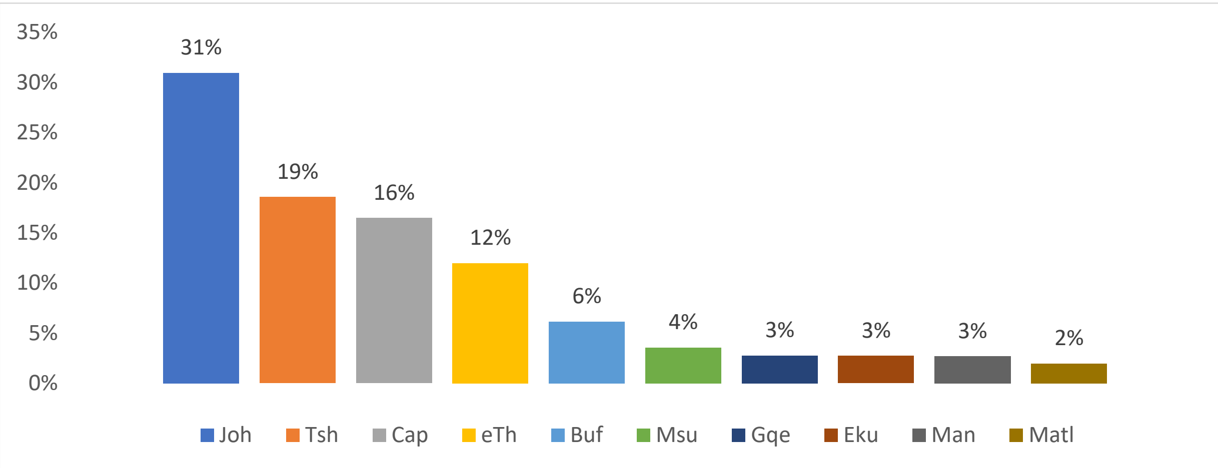


Figure 9: Estimated shares revenue by in top 10 markets for bananas, June 2022

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 R75 million derived from a total mass of 11 808 MT. This market was followed by KZN at R12 million (1 614 MT), WC R7 million (1 134 MT), EC at R3.24 million (691 MT), FS at R3.22 million (557 MT), and North West at R1 million (330 MT).

The MP had an estimated share of other vegetables at R112 129 (61 MT) while NC stood at R149 844 (35MT). The overall share of smallholder farmers in other vegetables in March 2022 was R104 million and 16 230 MT.

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

Province	Revenue	Mass
GP	R75 510 261	11 808
KZN	R12 922 490	1 614
WC	R7 833 901	1 134
EC	R3 244 076	691
FS	R3 225 394	557
NW	R1 383 848	330
MP	R112 129	61
NC	R149 844	35

Source: SAUFM (2022)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in June 2022 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 50% (8 175MT) (see Figure 10), followed by Tshwane at 20% (3 278 MT), Cape Town at 10% (1 614 MT), eThekwini at 6% (1 035 MT) and Mangaung at 3% (488 MT). The Ekurhuleni (339 MT), Buffalo City (332 MT) and Matlosana (330 MT) had the same share at

2% while Gqeberha was at 1% (223 MT). The Matjhabeng commanded the lowest share of smallholder farmers among the top ten markets both at 1% (204 MT).

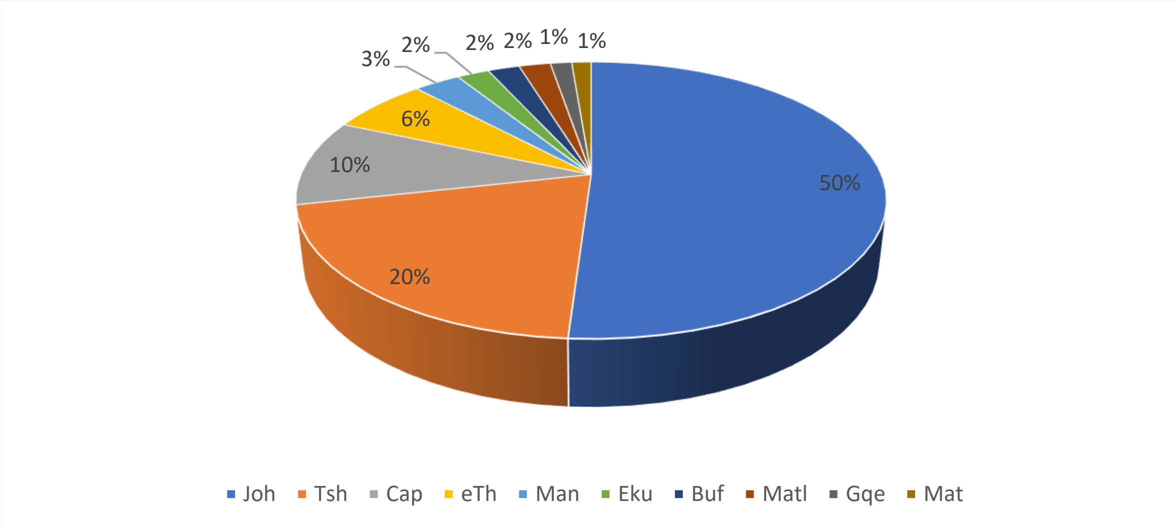


Figure 10: Estimated shares in top 10 markets by mass for other vegetables, June 2022

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% (R54 million), Tshwane at 19% (R19 million), Cape Town 12% (R12 million), eThekwini at 7% (R7 million) with Mangaung at (R2.37 million), Buffalo City (R2.14 million), and Ekurhuleni (R1.63 million) at 2%. The Matlosana (R1.38 million) and Gqeberha (R1.09 million) stood at 1%. The Matjhabeng had the least share of revenue for smallholder farmers among the top ten markets at 1% (R855 231).

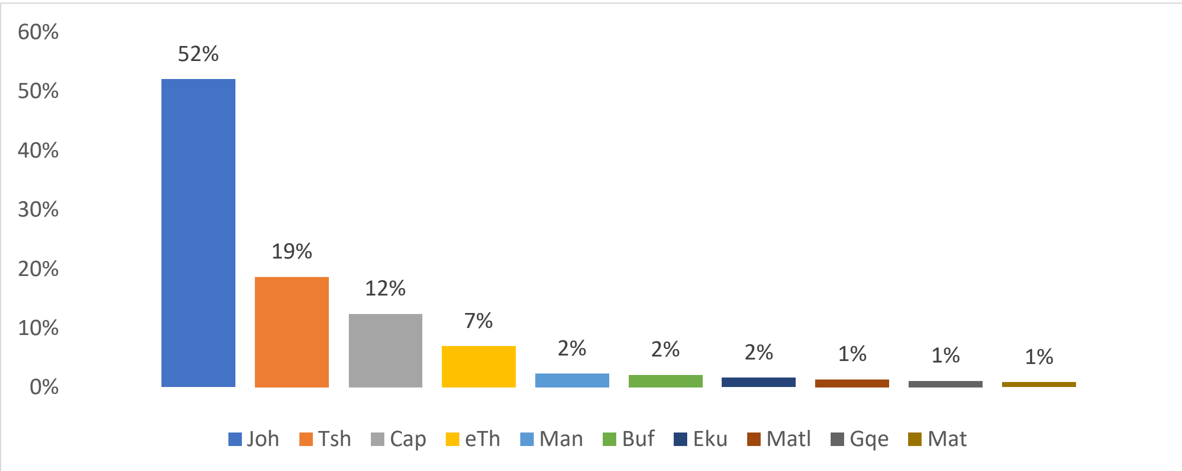


Figure 11: Estimated shares in revenue by markets for other vegetables, June 2022

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 June 2022. The GP province was leading with a revenue of R71 million derived from a total mass of 12 189 MT, followed KZN at R11 million (2 301 MT), WC at R8 million (1 144 MT), EC at R4 million (899 MT), FS at R2 million (463 MT) and NW at R1 million (308 MT).

The NC province had R149 844 (29 MT) while MP commanded the lowest estimated share of smallholder farmers in other fruits R112 129 (31 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R99 million matched by 17 363 MT.

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

Province	Revenue (R)	Mass (MT)
GP	R71 251 103	12 189
KZN	R11 593 040	2 301
WC	R8 513 014	1 144
EC	R4 187 524	899
FS	R2 238 354	463
NW	R1 511 592	308
NC	R149 844	29
MP	R112 129	31

Source: SAUFM (2022)

Market shares for other fruits traded in the various fresh produce markets in June 2022 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 46% (7 990 MT) (see Figure 12), followed by Tshwane at 20% (3 398 MT), eThekwini at 11% (1 858 MT), Cape Town at 7% (1 144 MT), Ekurhuleni at 4% (714 MT) with Mangaung (550 MT) and Msunduzi (443 MT) both at 3%. Other markets had the same share at 2% and they included Buffalo City (426 MT) and Matjhabeng (350 MT). Matlosana fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 308 MT.

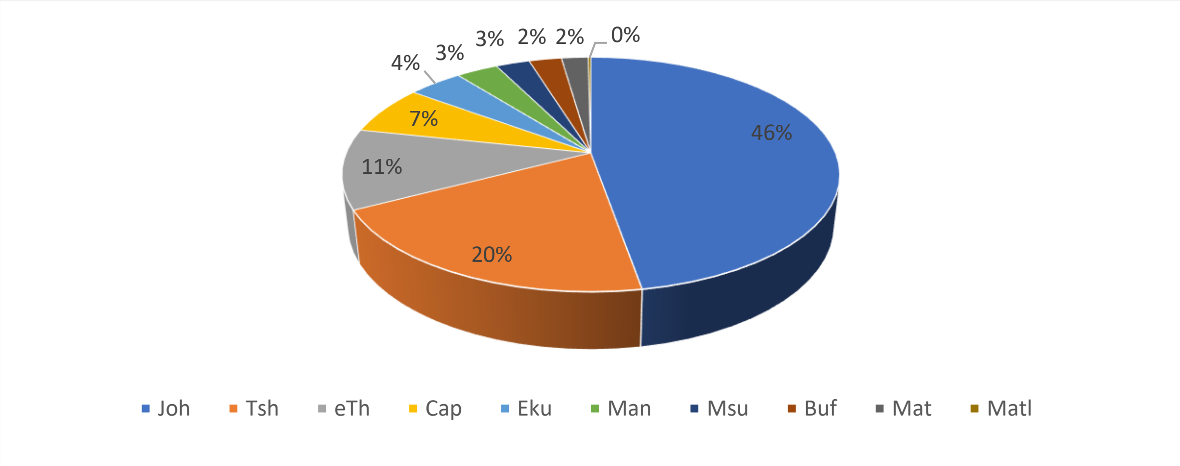


Figure 12: Estimated shares in top 10 markets by mass for other fruits, June 2022

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 49% (R49 million), Tshwane at 19% (R18 million), eThekwini at 10% (R9 million), Cape Town at 9% (R8 million) with Ekurhuleni (R3 million) and Mangaung (R2.80 million) both at 3%. The Buffalo City (R2.09 million), Msunduzi (R1.98 million), Matlosana (R1.51 million) had the same share at 2%. Matjhabeng had the lowest share of smallholder farmers among the top ten fresh produce markets at 1% (R1.38 million).

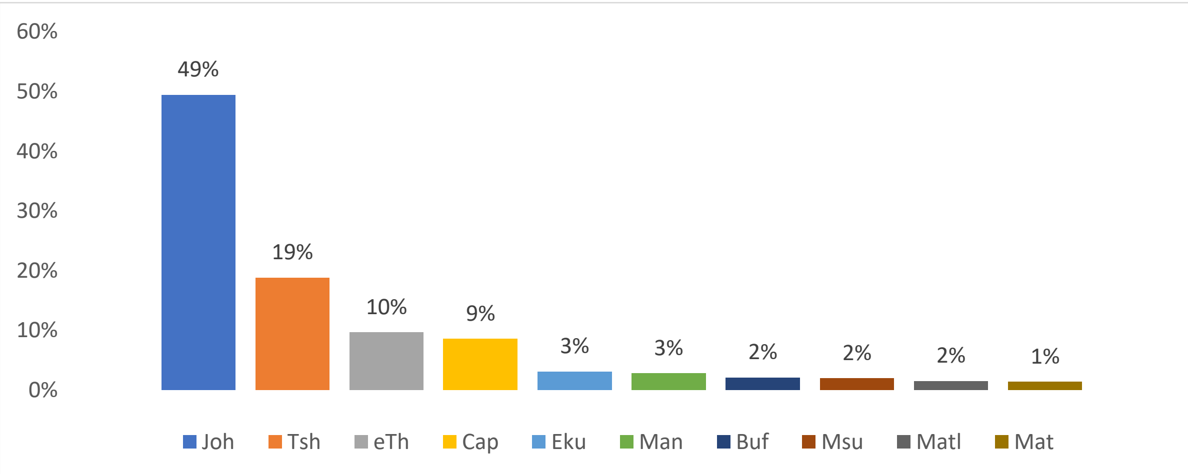
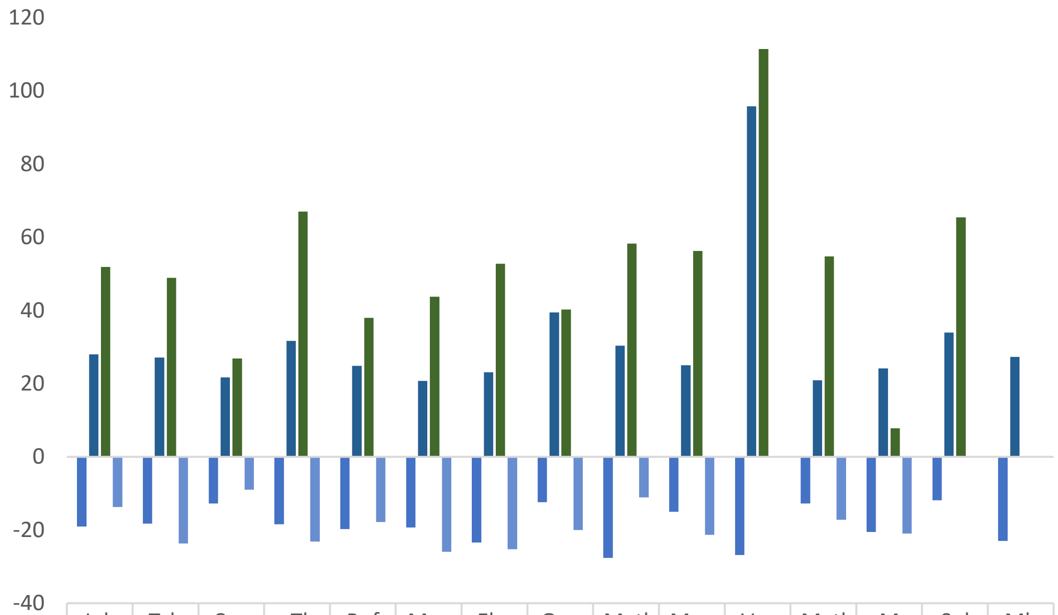


Figure 13: Estimated shares in revenue by top 10 markets for other fruits, June 2022

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 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 June 2021 and 2022. The price of potatoes per ton declined across all fresh produce markets, possibly due to stability in supply observed during the period. The decline was also observed for bananas. Prices for onions and tomatoes rose steeply during the period under review mainly due to supply constraints that were experienced especially within the tomato industry.



	Joh	Tsh	Cap	eTh	Buf	Msu	Eku	Gqe	Matl	Man	Ver	Matl	eMa	Sol	Mb
Potatoes	-19	-18	-13	-18	-20	-19	-23	-12	-28	-15	-27	-13	-20	-12	-23
Onions	28	27	22	32	25	21	23	39	30	25	96	21	24	34	27
Tomatoes	52	49	27	67	38	44	53	40	58	56	111	55	8	65	0
Bananas	-14	-24	-9	-23	-18	-26	-25	-20	-11	-21	0	-17	-21	0	0

Figure 14: Price trends for top four traded agricultural products in June 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 June 2022, the total mass traded in the fresh produce market system was 270 467 MT, generating a total revenue of R1.57 billion. Thirty percent (smallholder share) of this was estimated at 81 140 matched by R469 million in revenue. Gauteng was leading at 55 403 MT (translated as 68%) matched by a revenue of R318 million also interpreted as 68%. This was followed by KZN at 7 469 MT (R51 million), WC at 8 985 MT (R50 million), EC at 3 573 MT (R20 million), FS at 3 466 MT (R18 million), NW at 1 765 MT (R8 million) and MP at 296 MT (R1.34 million). The NC province had the lowest share of 185 MT (R1 million) 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 36 657 MT (R217 million), Tshwane at 15 175 MT (R84 million), Cape Town at 7 469 MT (R51 million), eThekwini at 7 397 MT (R51 million), Ekurhuleni at 3 143 MT (R14 million), Buffalo City at 2 399 MT (R13 million), Mangaung at 2 116 MT (R11 million), Matlosana at 1 765 MT (R8 million), Msunduzi at 1 589 MT (R7 million) and Matjhabeng at 1 350 MT (R6 million). By type of agricultural product, potatoes commanded the largest share at potatoes was R121 million (26 501 MT) followed by onions at R52 million and 9 354 MT, tomatoes at R52 million and 4 869 MT and bananas at R38 million and 6 823 MT. Other vegetables and fruits were at R104 million (16 230 MT) and R99 million matched by 17 363 MT, respectively.

The price of potatoes per ton declined across all fresh produce markets, possibly due stability in supply observed during the period. As similar trend was also observed for bananas. Prices for onions and tomatoes rose steeply during the period under review mainly due to supply constraints that were experienced especially within the tomato industry.

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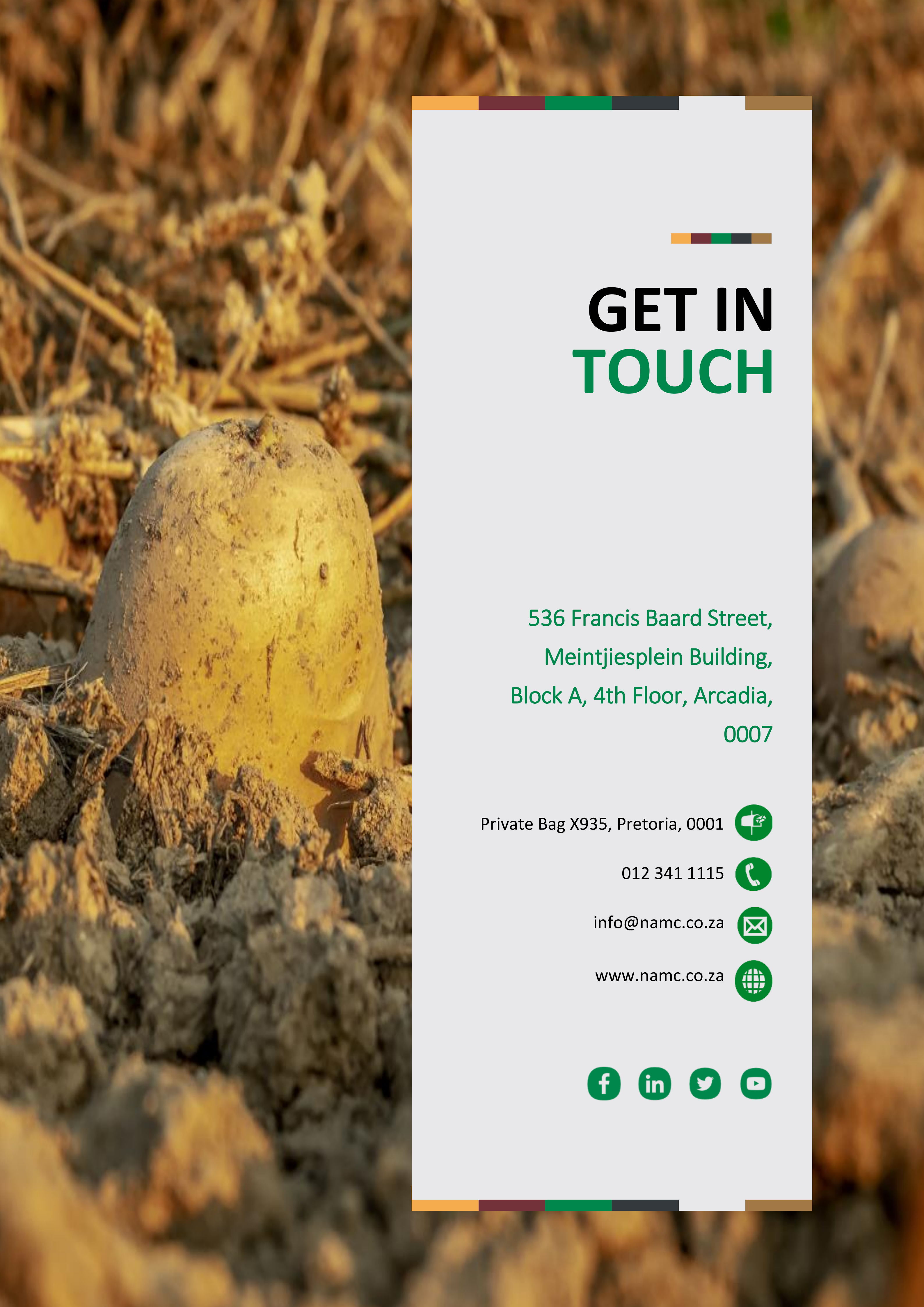

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