NAMC

Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

August 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 August 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 SAUFM.

2. OVERVIEW OF THE MONTH – AUG 22

In August 2022 the total mass traded from the NFPMs was 290 760 MT, generating a total revenue of R1.73 billion (see Table 1). This indicates 8% (21 743 MT) and 16% (R234 million) growth compared to the same month during the previous year. The growth of revenue and mass is indicative of the important role of the fresh produce market system on the country's food security.

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

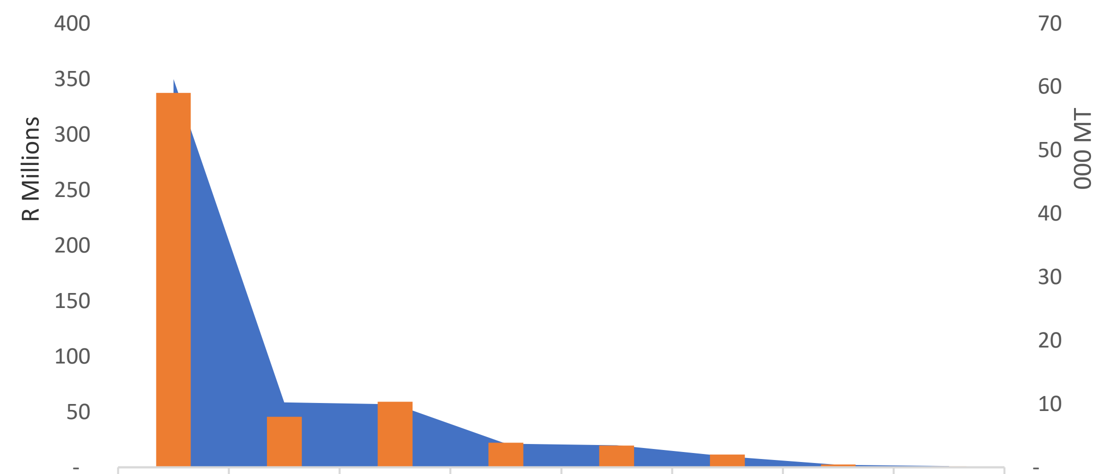
Commodity	Revenue	Mass
Total	R1 730 192 848	290 760
Potatoes	R400 905 852	96 969
Onions	R192 308 854	32 242
Tomatoes	R218 169 094	16 956
Bananas	R155 362 679	29 551
Other vegetables	R395 171 849	58 004
Other fruit	R368 274 521	57 038

Source: SAUFM (2022)

Potatoes had a total mass of 96 969 MT, indicating an increase of 18% compared to the same month in the previous year. Their revenue declined by 9% during the same period to reach R400 million. The total mass for onions decreased by 3% (1 024 MT) to reach 32 242 MT in August 2022. The revenue also grew by 68% (translated as R78 million) to reach R192 308 854. Tomatoes had a total mass of 16 956 MT, indicating a decrease of 38% (translated as 10 564 MT). This traded mass was matched by a total revenue of R218 million, indicating 47% increase. Bananas showed a massive increase of 56% (10 659 MT) in mass traded, matched by an increase of R24 634 395 in revenue to reach R155 million in August 2022. Other vegetables traded in the system recorded a decrease of 2% (1 456 MT) in mass matched by an increase of 21% (R67 million) in revenue. The other fruits recorded an increase of 19% (9 026 MT) to reach a total traded mass of 57 038 MT in August 2022. The revenue of these fruits also grew by 11% (R36 million) to reach R368 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	WC	KZN	FS	EC	NW	MP	NC
Revenue	349773 6	58412 33	56645 69	21291 15	19993 94	9720 257	2183 225	1037 639
Mass	59 054	7 976	10 318	3 858	3 415	1 992	449	165

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

For the entire month of August 2022, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 87 228 MT and R519 057 854 million, respectively. A further analysis of this at the provincial level show that GP was leading at 59 054 MT (translated as 68%) matched by a revenue of R349 million (interpreted as 67%) (See Figure 1). This was followed by KZN at 10 318 MT (R56 million), WC at 7 976 MT (R58 million), FS at 3 858 MT (R21 million), EC at 3 415 MT (R19 million), NW at 1 992 MT (R9 million) and MP at 449 MT (R2 million). The NC province had the lowest share of 165 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 38 635 MT (R238 million), Tshwane at 16 302 MT (R92 million), Cape Town at 7 976 MT (R58 million), eThekwini at 8 429 MT (R47 million), Ekurhuleni at 3 647 MT (R17 million), Mangaung at 2 357 MT (R13 million), Buffalo City at 2 201 MT (R12 million), Matlosana at 1 992 MT (R9 million), Msunduzi at 1 889 MT (R8 million) and Matjhabeng 1 501 MT (R7 million) (see table 2).

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

Market	Revenue	Mass (MT)
Johannesburg	238 139 758	38 635
Tshwane	92 522 795	16 302
Cape Town	58 412 330	7 976
eThekwini	47 990 117	8 429
Ekurhuleni	17 051 260	3 647
Mangaung	13 373 376	2 357
Buffalo City	12 859 193	2 201
Matlosana	9 720 257	1 992
Msunduzi	8 655 574	1 889
Matjhabeng	7 917 783	1 501
Gqeberha	7 030 287	1 187
Vereeniging	2 059 796	470
eMalahleni	1 473 949	304
Sol Plaatje	1 037 639	165
Mbombela	709 276	145
Kei	104 466	28

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 R76 million derived from 18 989 MT (see Table 3). This was followed by KZN at R14 million (3 561 MT), WC at R12 million (2 538 MT), EC at R6 million (1 316 MT), FS at R5 million (1 514 MT) and NW at R3 million (864 MT), MP at R1.1 million (254 MT). The NC at R234 558 (54 MT), respectively. The overall share in potatoes was R120 million (29 091 MT).

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

Province	Revenue	Mass
GP	R76 299 720	18 989
KZN	R14 704 952	3 561
WC	R12 052 713	2 538
EC	R6 947 128	1 316
FS	R5 639 545	1 514
NW	R3 226 344	864
MP	R1 166 795	254
NC	R234 558	54

Source: SAUFM (2022)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 11 969 MT (41%), followed by Tshwane at 5 056 MT (17%), eThekwini at 2 745 MT (9%), Cape Town at 2 538MT (9%) and Ekurhuleni at 1 664 MT (6%). Other markets in the top ten included Buffalo City (886 MT), Matlosana (864 MT), Msunduzi (816 MT) all at 3%. The Mangaung (726 MT) and Gqeberha (619 MT) had the least share in potatoes among the top ten markets at 2%.

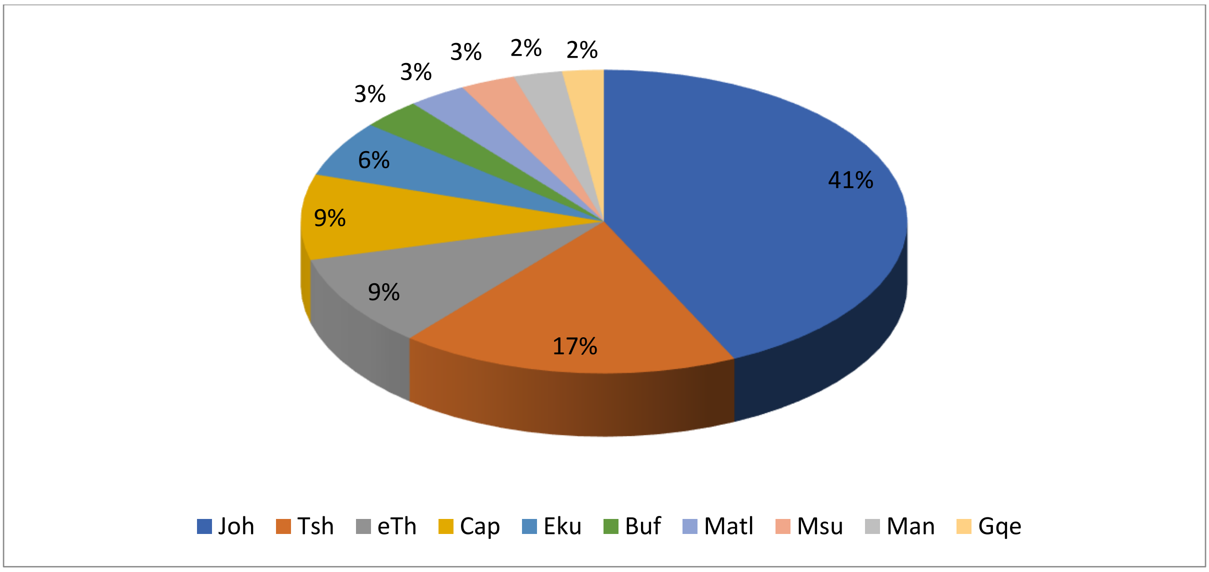


Figure 2: **Estimated share in top 10 markets by mass for potatoes, August 2022**

Source: SAUFM (2022)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R47 million (40%) followed by Tshwane at R20 million (17%), Cape Town at R12 million (10%), eThekwini at R11 million (10%) and Ekurhuleni at R6 million (5%). The Buffalo City (R4 million), Matlosana (R3.22 million), Msunduzi (R3.21 million) and Mangaung (R3.18 million) had the same share at 3%. Gqeberha (2.78 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

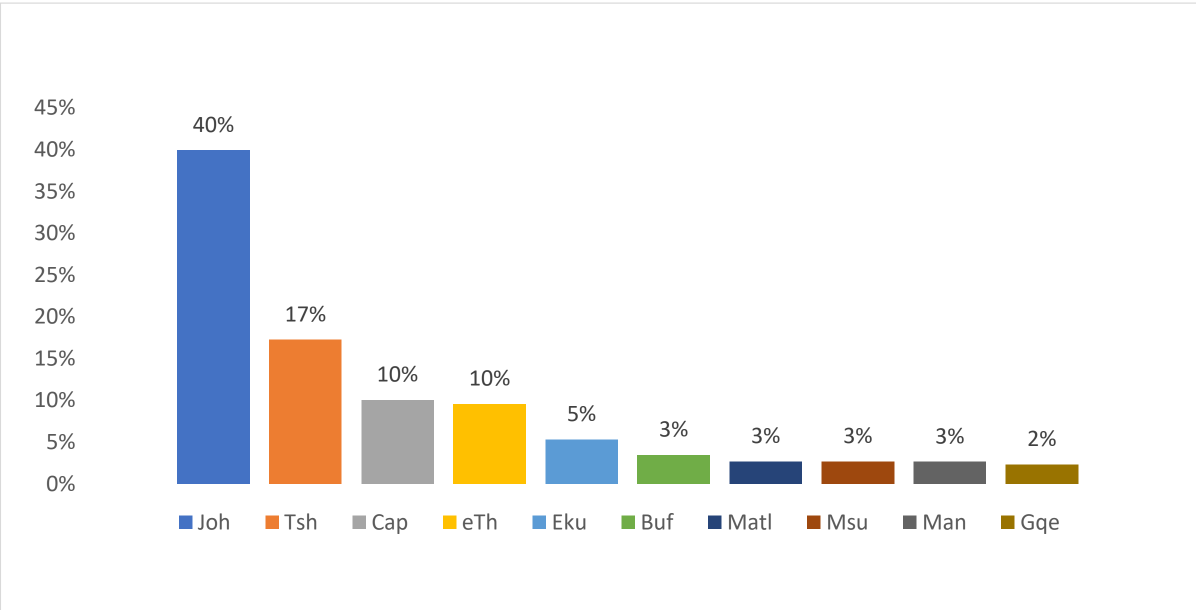


Figure 3: **Estimated shares in revenue by top 10 markets for potatoes, August 2022**

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 R40 million in revenue, derived from 7 196 MT in mass, followed by KZN at R7 million (1 034 MT), WC at R4 million (677 MT), EC at R2 million (303 MT), FS at R1 million (265 MT), NW) at R663 186 (120 MT) and MP at R365 108 (68 MT).

The NC at R61 284 (10 MT) had the lowest share of smallholder farmers in onions. The overall share was R57 million and 9 673 MT.

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

Province	Revenue	Mass
GP	R40 746 905	7 196
KZN	R7 136 481	1 034
WC	R4 759 451	677
EC	R2 299 987	303
FS	R1 660 254	265
NW	R663 186	120
MP	R365 108	68
NC	R61 284	10

Source: SAUFM (2022)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in August 2022. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 5 393 MT (56%). It was followed by Tshwane at 1 533 MT (16%), eThekwini at 929 MT (10%), Cape Town at 677 MT (7%), and Ekurhuleni at 259 MT (3%). Other markets included Buffalo City (209 MT), Mangaung (166 MT) both at 2% while Matlosana (120 MT) and Msunduzi (105 MT) were at 1%. Matjhabeng had the least share of smallholder farmers in onions among the top ten markets at 1% (99 MT).

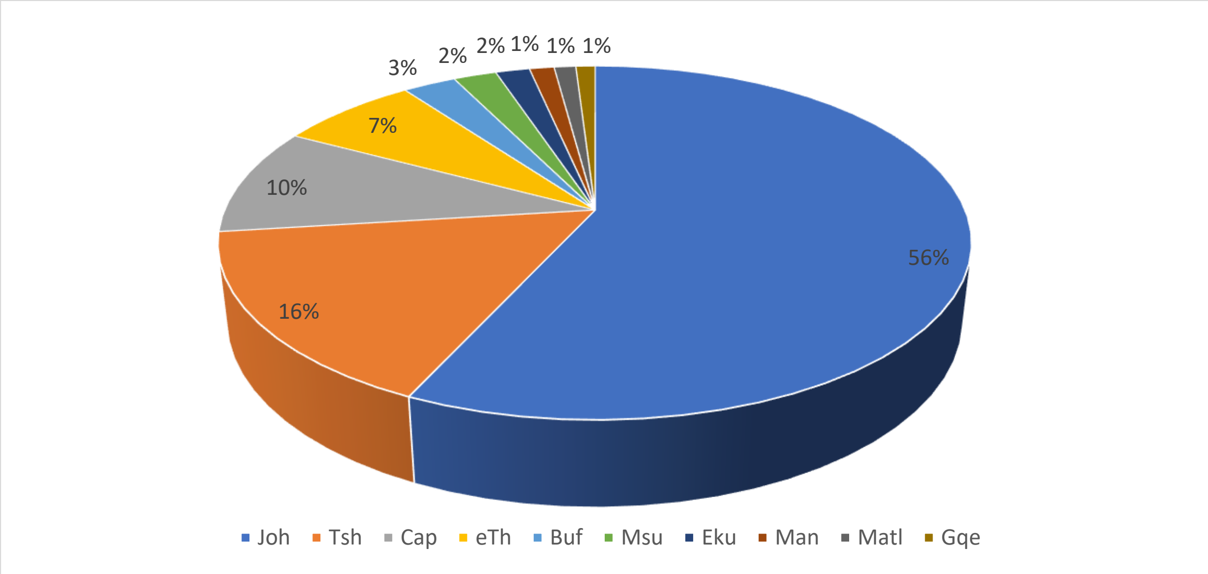


Figure 4: Estimated shares in top 10 markets by mass for onions, August 2022

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 53% (R30 million), followed by Tshwane at 15% (R8 million), eThekwini at 11% (R6 million), Cape Town at 8% (R4 million) and Buffalo City at 3% (R1.57 million). The Ekurhuleni (R1.33 million), Mangaung (R1.06 million) both at 2% while Gqeberha (R727 410) and Msunduzi (R722 959) were at 1%. Matlosana (R663 186) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

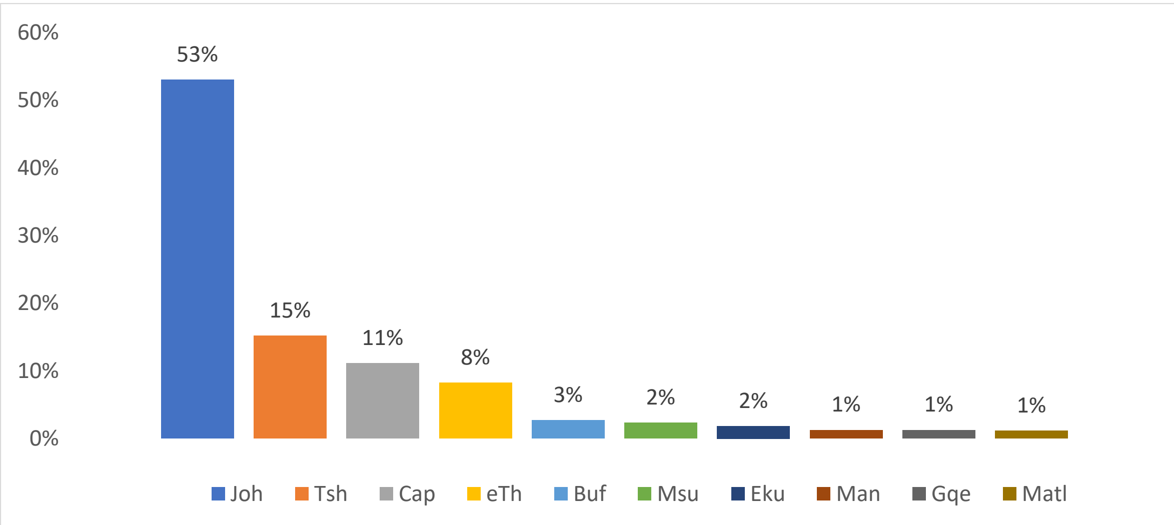


Figure 5: Estimated shares in revenue by top 10 markets for onions, August 2022

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 R43 million in revenue derived from a total mass of 3 474 MT, followed by KZN at R9 million (672 MT), WC at R5 million (427 MT), FS at R3 million (233 MT), EC at R2 million (137 MT), NW at R1.44 million (106 MT) and NC at R395 729 (28 MT). The MP province was at R113 866 (10 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 R65 million and 5 087 MT.

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

Province	Revenue	Mass
GP	R43 568 945	3474
WC	R9 425 896	672
KZN	R5 175 070	427
FS	R3 305 706	233
EC	R2 019 680	137
NW	R1 445 836	106
NC	R395 729	28
MP	R113 866	10

Source: SAUFM (2022)

Tomatoes were the fourth largest traded commodity in terms of mass at fresh produce markets in August 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 49%, translated as 2 507 MT (see Figure 6). This market was followed by Tshwane at 741 MT (15%), Cape Town at 672 MT (13%), eThekwini at 391 MT (8%), Ekurhuleni at 4% (201 MT) and Mangaung at 3% (135 MT). Other markets among the top ten included Matlosana (106 MT), Matjhabeng (98 MT) and Buffalo City (78 MT) at 2%. The

Gqeberha (59 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 1%.

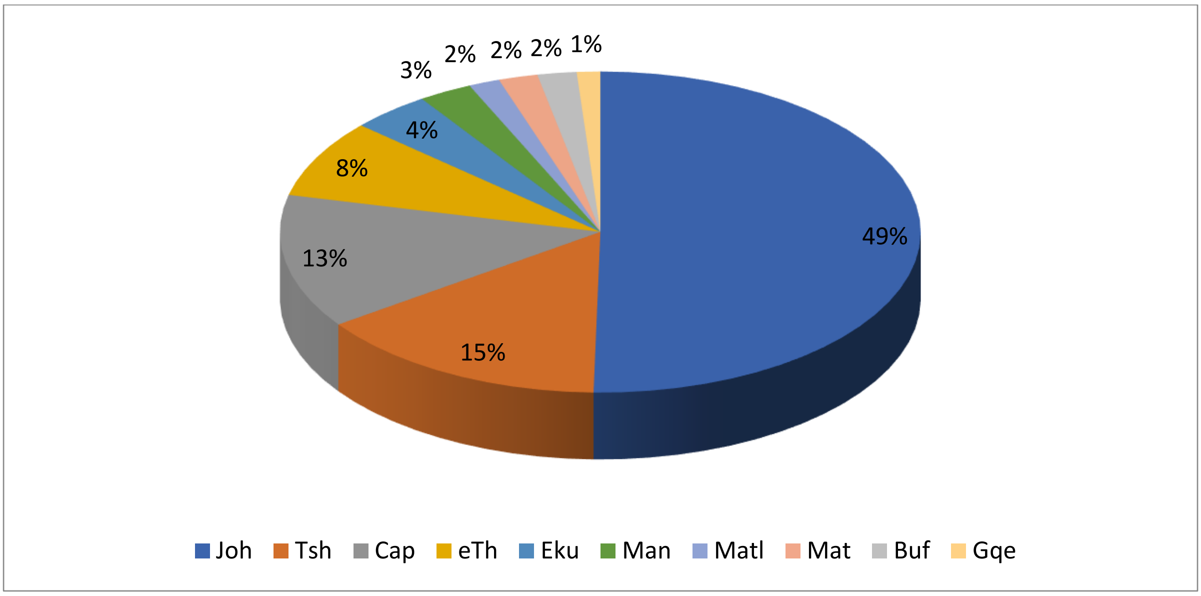


Figure 6: Estimated share in top 10 markets by mass for tomatoes, August 2022

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 48% (R31 million), Tshwane at 15% (R9.63 million), Cape Town at 14% (R9.42 million), eThekwini at 7% (R4 million) while Ekurhuleni (R2 million) and Mangaung (R1.89 million) were both at 3%. The Matlosana (R1.44 million), Matjhabeng (R1.41 million) and Buffalo City (R1.05 million) had the same share at 2%. The Gqeberha (R963 912) had the lowest share of smallholder farmers in tomatoes among the top ten markets at 1%.

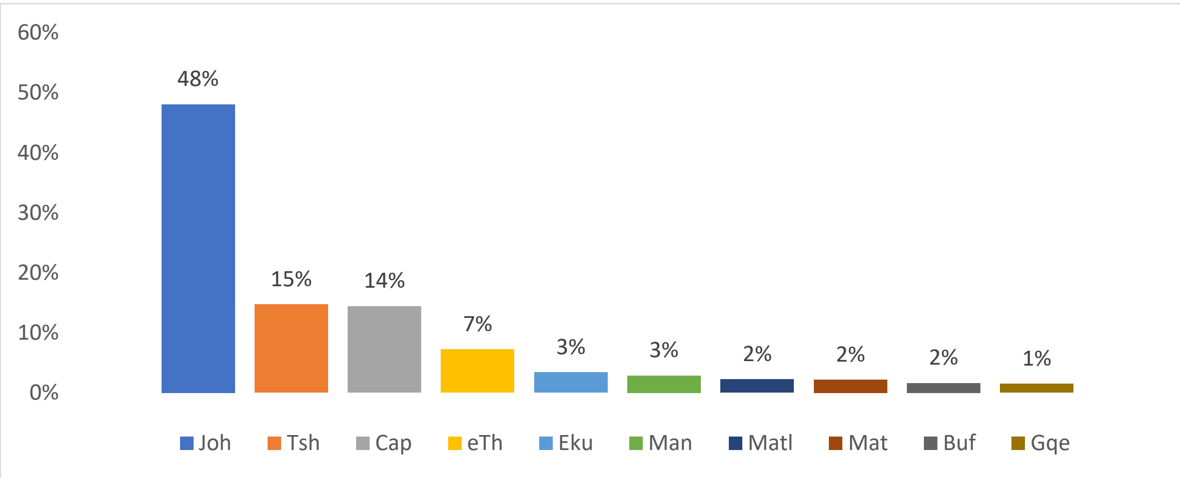


Figure 7: Estimated share in revenue by top 10 markets for tomatoes, August 2022

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 at R26 million derived from a total mass of 5 253 MT, followed by WC at R6.95 million (1 407 MT), KZN at R6.94 million (1 101 MT), EC at R3 million (502 MT), FS at R2 million (377 MT) and NW at R887 174 (178 MT).

The share of smallholder farmers in bananas in MP was estimated at R261 436 (48 MT) while NC had the lowest estimated share of smallholder farmers in bananas at R12 over the reported month. The estimated overall smallholder share for bananas was R46 million and 8 865 MT.

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

Province	Revenue	Mass
GP	R26 340 996	5 253
WC	R6 946 196	1 407
KZN	R6 941 915	1 101
EC	R3 211 452	502
FS	R2 019 624	377
NW	R887 174	178
MP	R261 436	48
NC	R12	0

Source: SAUFM (2022)

Bananas constituted the most traded fruit on the fresh produce market system in August 2022. The Johannesburg market commanded the largest share of smallholder farmers at 33% (2 883 MT) (see Figure 8). It was followed by Tshwane at 22% (1 984 MT), Cape Town at 12% (1 101 MT), eThekwini at 12% (1 052 MT) with Buffalo City (363 MT), Msunduzi (355 MT) and Ekurhuleni (331 MT) at 4% while Mangaung (244MT) was at 3%. The Matlosana stood at 2% (178 MT). Among the top ten markets Gqeberha fresh produce market (138 MT) commanded the least estimated share of smallholder farmers at 2%.

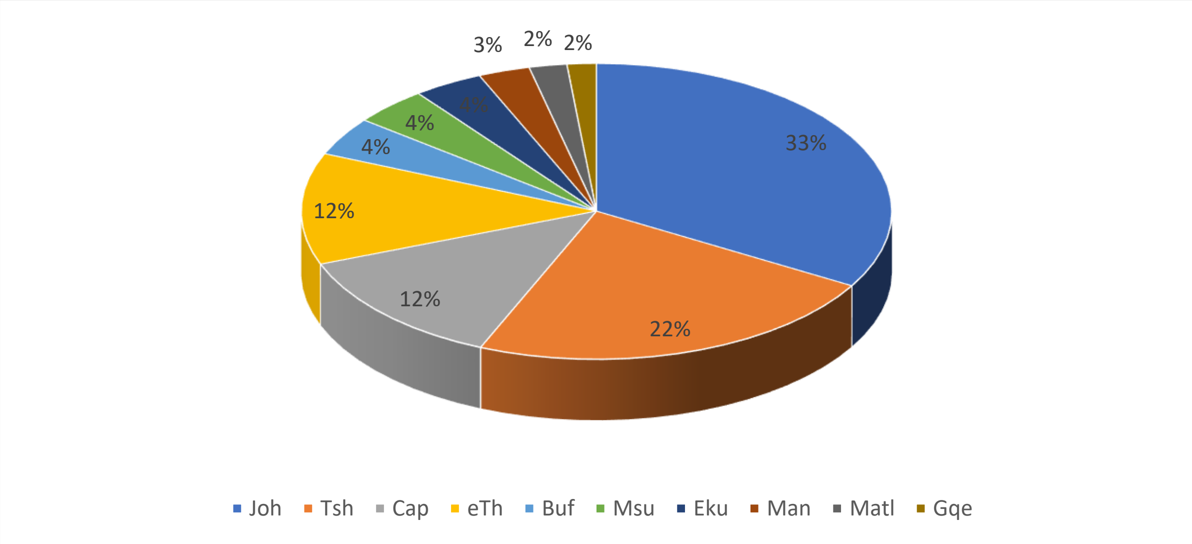


Figure 8: Estimated shares in top 10 markets by mass for bananas, August 2022

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% (R14 million) followed by Tshwane at 22% (R10 million), Cape Town at 15% (R6 million), eThekwini at 12% (R5 million), Buffalo City at 5% (R2 million) and Msunduzi at 3% (R1.47 million). The Ekurhuleni (R1.39 million), Mangaung (R1.35 million) were also at 3% while and Gqeberha (R1 million) was at 2%. Among the top ten Matlosana fresh produce market had the least share at 2% (R887 173 million).

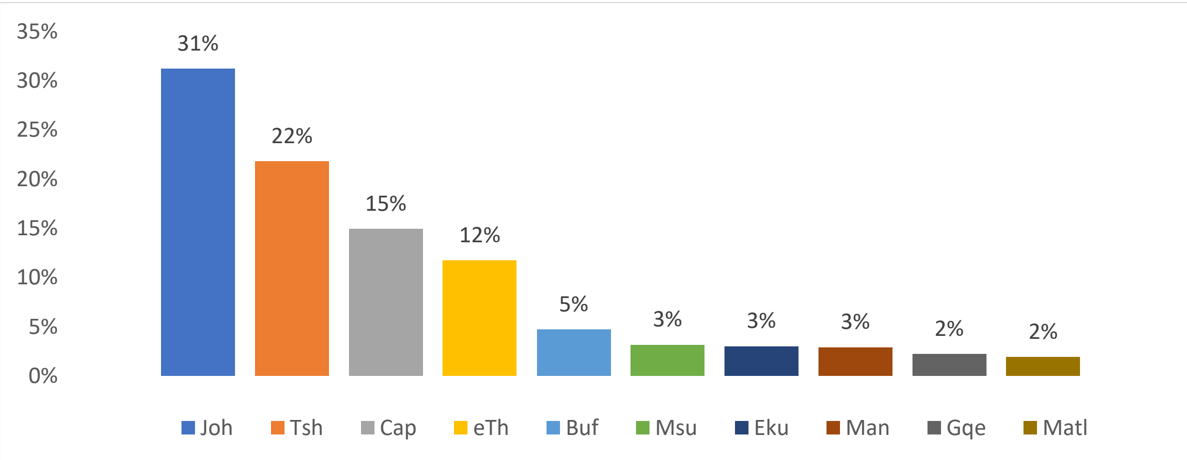


Figure 9: Estimated shares revenue by in top 10 markets for bananas, August 2022

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 R85 million derived from a total mass of 12 677 MT. This province was followed by WC at R15 million (1 713 MT), KZN at R8 million (1 257 MT), EC at R3.9 million (533 MT), FS at R3.1 million (764 MT), and North West at R1.7 million (371 MT).

The MP had an estimated share of other vegetables at R101 992 (39 MT) while NC stood at R182 896 (48 MT). The overall share of smallholder farmers in other vegetables in August 2022 was R118 million and 17 401 MT.

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

Province	Revenue	Mass
GP	R85 672 888	12 677
WC	R15 331 286	1 713
KZN	R8 336 464	1 257
FS	R3 160 419	764
EC	R3 972 625	533
NW	R1 740 685	371
MP	R101 992	39
NC	R182 896	48

Source: SAUFM (2022)

The market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in August 2022 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 49% (8 572 MT) (see Figure 10), followed by Tshwane at 21% (3 621 MT), Cape Town at 10% (1 713 MT), eThekwini at 7% (1 143 MT) and Mangaung (530 MT) and Ekurhuleni (458 MT) both at 3%. The Matlosana (371 MT) and Buffalo City (288 MT) also had the same share at 2%, followed by Matjhabeng (235 MT) at 1%. The

Gqeberha commanded the lowest share of smallholder farmers among the top ten markets both at 1% (229 MT).

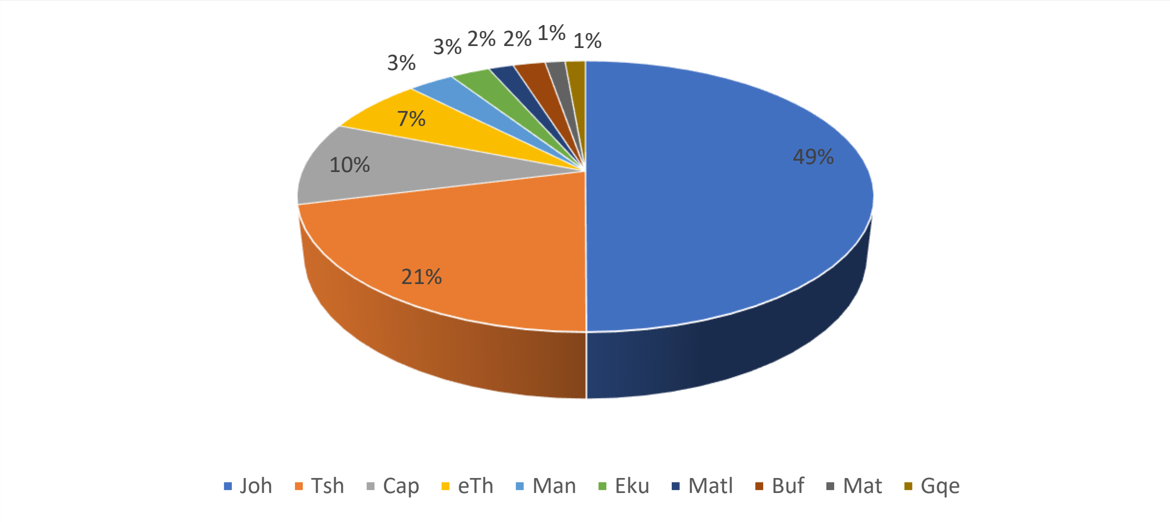


Figure 10: Estimated shares in top 10 markets by mass for other vegetables, August 2022

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% (R61 million), Tshwane at 19% (R22 million), Cape Town 13% (R15 million), eThekwini at 6% (R7 million) with Mangaung at 2% (R2.76 million), Ekurhuleni (R2.10 million) and Buffalo City (R1.88 million) also at 2% while Matlosana (R1.74 million) and Matjhabeng (R1.21 million) stood at 1%. The Gqeberha had the least share of revenue for smallholder farmers among the top ten markets at 1% (R1.20 million).

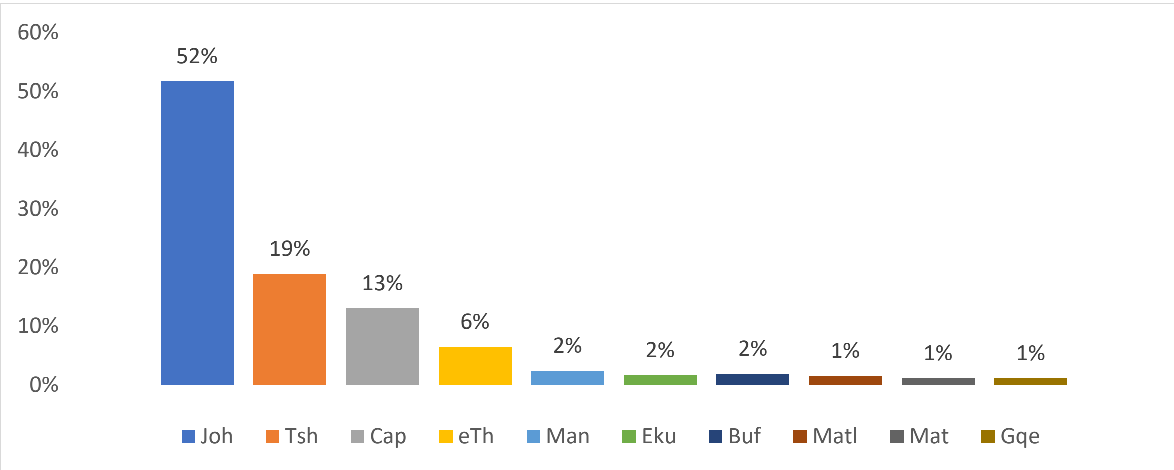


Figure 11: Estimated shares in revenue by markets for other vegetables, August 2022

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 August 2022. The GP province was leading with a revenue of R77 million derived from a total mass of 11 466 MT, followed KZN at R14 million (2 632 MT), WC at R9 million (1 276 MT), FS at R4 million (903 MT), EC at R2 million (427 MT) and NW at R101 992 (324 MT).

The MP was at R182 896 (34 MT) while NC province commanded the lowest estimated share of smallholder farmers in other fruits at R101 992 (30 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R110 million matched by 17 401 MT.

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

Province	Revenue (R)	Mass (MT)
GP	R77 144 155	11 466
KZN	R14 350 810	2 632
WC	R9 896 788	1 276
FS	R4 693 405	903
EC	R2 355 280	427
NW	R1 757 031	354
NC	R101 992	20
MP	R182 896	34

Source: SAUFM (2022)

Market shares for other fruits traded in the various fresh produce markets in August 2022 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 43% (7 311MT) (see Figure 12), followed by Tshwane at 20% (3 367 MT), eThekwini at 13% (2 170 MT), Cape Town at 7% (1 276 MT), Ekurhuleni at 4% (736 MT) with Mangaung (557 MT) and Msunduzi (462 MT) both at 3%. Other markets had the same share at 2% and they included Buffalo City (376 MT) and Matlosana (354 MT). Matjhabeng fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 2% (346 MT).

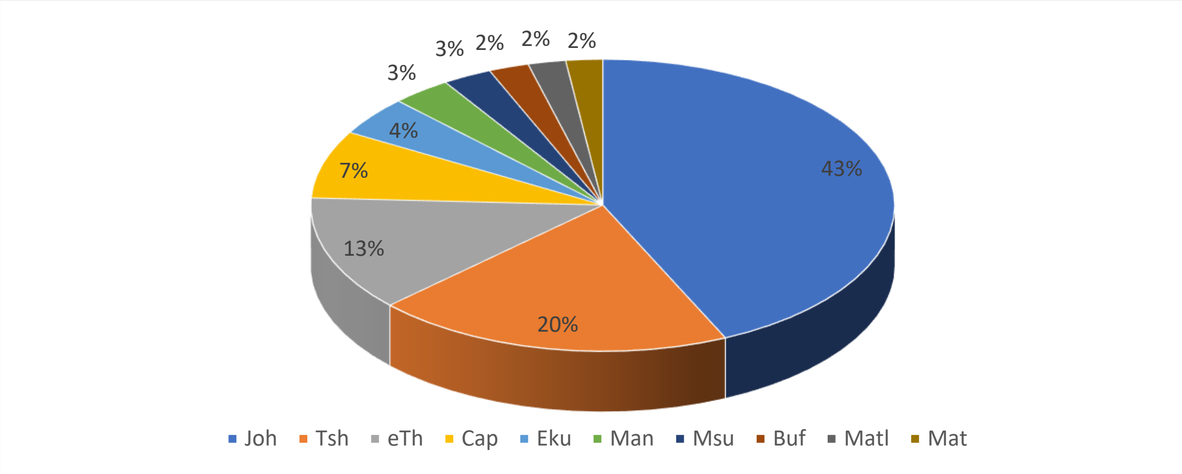


Figure 12: Estimated shares in top 10 markets by mass for other fruits, August 2022

Source: SAUFM (2022)

The estimated share by revenue in other fruits for top 10 markets, measured in percentages is presented in Figure 13. Leading the list of the top 10 markets was Johannesburg at 47% (R52 million), Tshwane at 19% (R20 million), eThekwini at 11% (R12 million), Cape Town at 9% (R9 million) with Ekurhuleni (R3.60 million) and Mangaung (R3.11 million) both at 3%. The Msunduzi (R2.10 million), Buffalo City (R2.03 million), Matlosana (R1.75 million) had the same share at 2%. Matjhabeng had the lowest share of smallholder farmers among the top ten fresh produce markets at 1% (R1.57 million).

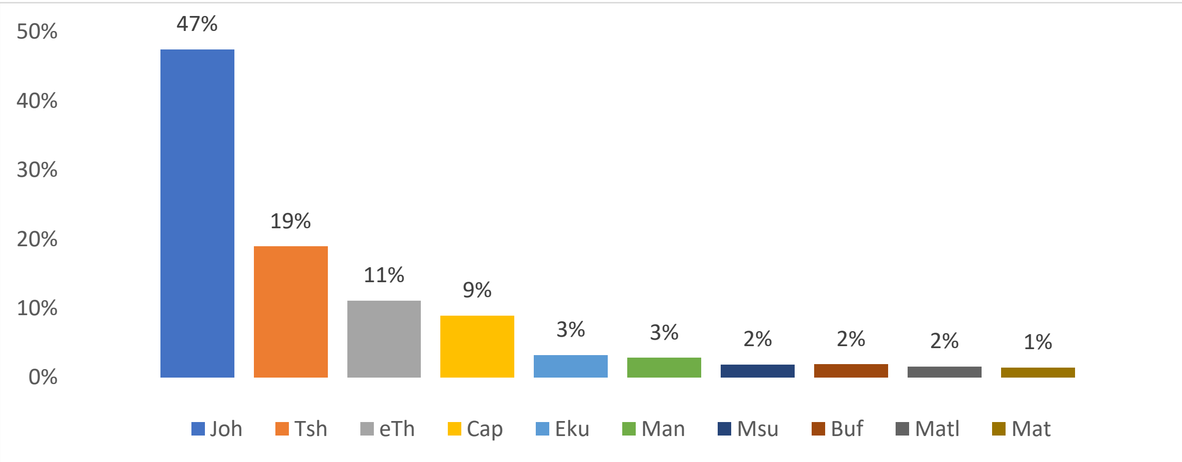
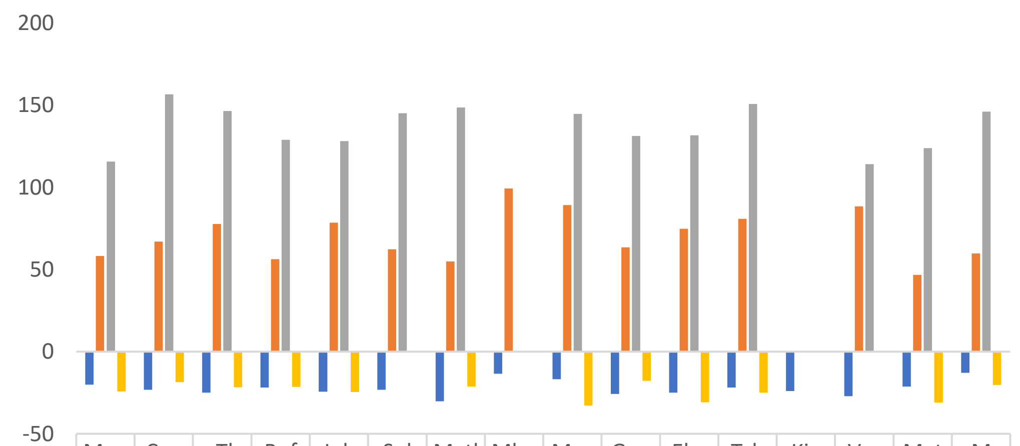


Figure 13: Estimated shares in revenue by top 10 markets for other fruits, August 2022

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 August 2021 and 2022. The average price for potatoes decreased by -24% ranging from -30% in Matlosana to -13% in eMalahleni and Mbombela fresh produce markets. On contrary, onion showed an average price increase of 74% ranging from 0% in Kie to 99% in Mbombela. Tomatoes exhibited excessive price increase with an average increase of 138% with the lowest price change at 0% in Mbombela and Kie while the maximum was at 157% in Cape Town. Finally, bananas had an average price change of -24% and range from -33% in Msunduzi and maximum at 0% suggesting no price changes in Vereeniging, Sol Plaatjie, Mbombela and Kie. Overall, all the markets exhibited positive price changes for onions and tomatoes. 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	-20	-23	-25	-22	-24	-23	-30	-13	-17	-26	-25	-22	-24	-27	-21	-13
Onions	58	67	78	56	79	62	55	99	89	64	75	81	0	88	47	60
Tomatoes	116	157	147	129	128	145	149	0	145	131	132	151	0	114	124	146
Bananas	-24	-19	-22	-21	-25	0	-21	0	-33	-18	-31	-25	0	0	-31	-20

Figure 14: Price trends for top four traded agricultural products in August 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 August 2022, the total mass traded in the fresh produce market system was 290 760 MT, generating a total revenue of R1.73 billion. Thirty percent (smallholder share) of this was estimated at 87 228 matched by R519 057 854 million in revenue. A further analysis of this thirty percent show that GP was leading at 59 054 MT matched by a revenue of R349 million followed by KZN at 10 318 MT (R56 million), WC at 7 976 MT (R58 million), FS at 3 858 MT (R21 million), EC at 3 415 MT (R19 million), NW at 1 992 MT (R9 million) and MP at 449 MT (R2 million). The NC province had the lowest share of 165 MT (R1 million) from smallholder farmers over the period under review.

Marketwise, the Johannesburg market commanded the list of the top ten fresh produce markets at 38 635 MT (R238 million) followed by Tshwane at 16 302 MT (R92 million), Cape Town at 7 976 MT (R58 million), eThekwini at 8 429 MT (R47 million), Ekurhuleni at 3 647 MT (R17 million), Mangaung at 2 357 MT (R13 million), Buffalo City at 2 201 MT (R12 million), Matlosana at 1 992 MT (R9 million), Msunduzi at 1 889 MT (R8 million) and Matjhabeng 1 501 MT (R7 million). By type of agricultural product, potatoes commanded the largest share at 120 million (29 091 MT), followed by onions at R57 million (9 673 MT), tomatoes at R65 million (5 087 MT) and bananas at R46 million (8 865 MT). Other vegetables and fruits were at R118 million (17 401 MT) and R110 million (17 401 MT), respectively.

The prices of onions and tomatoes measured by Rand per ton increased across all fresh produce markets over the period of analysis. The prices for potatoes and bananas declined sharply during the period under review.

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