NAMC
Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

NOVEMBER 2022

National Agricultural Marketing Council

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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 November 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 – NOV 22

In November 2022 the total mass traded from the NFPMs was 287 903 MT, generating a total revenue of R1.94 billion (see Table 1). This indicates 0.45 % (1 287 MT) decline in volume and 23% (R358 million) increase in revenue compared to the same month during the previous year. This finding is an 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 Nov 2022

Commodity	Revenue	Mass
Total	R1 945 290 727	287 903
Potatoes	R443 884 634	99 778
Onions	R269 836 063	26 067
Tomatoes	R188 978 267	21 737
Bananas	R201 188 594	28 307
Other vegetables	R349 252 383	63 171
Other fruit	R492 150 787	48 843

Source: SAUFM (2022)

Potatoes had a total mass of 99 778 MT, indicating an increase of 4% compared to the same month in the previous year. Their revenue increase by 16% during the same period to reach

R443 million. The total mass for onions decreased by 17% (5 198 MT) to reach 26 067 MT in November 2022. But the revenue grew by 179% (R173 million) to reach R269 million. Tomatoes had a total mass of 21 737 MT, indicating a decrease by 14 % (translated as 3 659 MT). This traded mass was matched by a total revenue of R188 million, indicating 18% increase compared to the previous year. Bananas showed a massive increase of 54% (9 910 MT) in mass traded, matched by increase of R35 million in revenue to reach R201 million in November 2022. Other vegetables traded in the system recorded a decrease of 0.28% (176 MT) in mass matched by an increase of 12% (R39 million) in revenue. The other fruits recorded an decrease of 11% (6 107 MT) to reach a total traded mass of 48 843 MT in November 2022. The revenue of these fruits grew by 4% (R21 million) to reach R492 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.

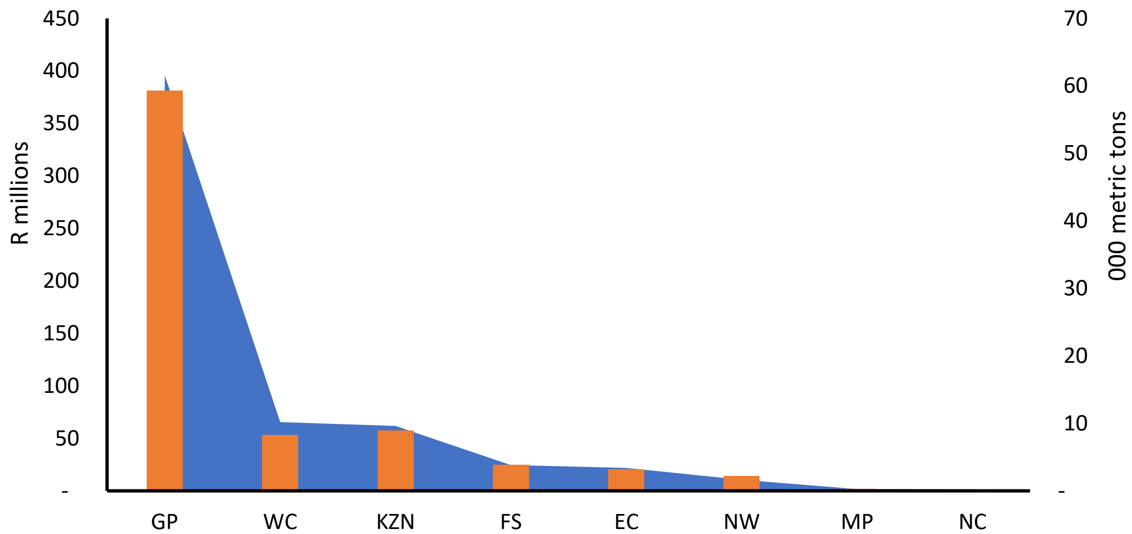


Figure 1: Summary of estimated share of smallholder farmers in different provinces by revenue and mass, Nov 2022.
Source: SAUFM (2022)

For the entire month of November 2022, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 88 371 MT and R583 million, respectively. A further analysis of this at the provincial level show that GP was leading at 59 303 MT matched by a revenue of R395 million (See Figure 1). This was followed by WC at 8 310 MT (R65 million), KZN at 8v938 MT (R62 million), FS at 3 881 MT (R24 million), EC at 3 215 MT (R21 million), NW at 2 207 MT (R10 million) and MP at 307 MT (R1.6 million). The NC had the lowest share from smallholder farmers at 212 MT (R1.2 million).

In terms of market analysis, the Johannesburg market commanded the list of the top ten fresh produce markets at 39 064 MT (R269 million) followed by Tshwane at 16 327 MT (R106 million), Cape Town at 8 310 MT (R65 million), eThekwini at 7 373 MT (R52 million), Ekurhuleni at 3 584 MT (R18 million), Mangaung at 2 353 MT (R15 million), Buffalo City at 2 003 MT (R14 million), Matlosana at 2 207 MT (R10 million), Msunduzi at 1 565 MT (R9 million) and Matjhabeng 1 528 MT (R8 million) (see table 2).

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

Market	Revenue	Mass
Johannesburg	269 198 990	39 064
Tshwane	106 734 262	16 327
Cape Town	65 607 457	8 310
eThekwini	52 782 384	7 373
Ekurhuleni	18 203 587	3 584
Mangaung	15 836 928	2 353
Buffalo City	14 087 785	2 003
Matlosana	10 714 643	2 207
Msunduzi	9 192 307	1 565
Matjhabeng	8 783 063	1 528
Gqeberha	7 746 074	1 166
eMalahleni	1 635 297	303
Vereeniging	1 633 134	329
Sol Plaatje	1 281 781	212
Kei	112 357	47
Mbombela	37 170	4

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 R89 million derived from 20 026 MT (see Table 3). This was followed by WC at R14 million (3 282 MT), KZN at R10 million (2 556 MT), FS at R7 million (1 278 MT), EC at R6 million (1 594 MT) and NW at R3 million (951 MT). The NC was at R777 519 (164 MT) while MP at R420 428 (83 MT). The overall share in potatoes was R133 million (29 933 MT).

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

Province	Revenue	Mass
GP	R89 043 976	20 026
WC	R14 693 589	3 282
KZN	R10 332 585	2 556
FS	R7 511 005	1 278
EC	R6 492 558	1 594
NW	R3 893 729	951
NC	R777 519	164
MP	R420 428	83

Source: SAUFM (2022)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 12 886 MT (43%), followed by Tshwane at 5 024 MT (17%) with eThekwini 2 611 MT and Cape Town (2 556 MT) at 9%, and Ekurhuleni at 1 863 MT (6%). Other markets in the top ten included Matlosana (951 MT), Mangaung (834 MT), Matjhabeng (760 MT) and Buffalo City (757 MT) commanding the same share at 3%. Msunduzi (672 MT) had the least share in potatoes among the top ten markets at 2%.

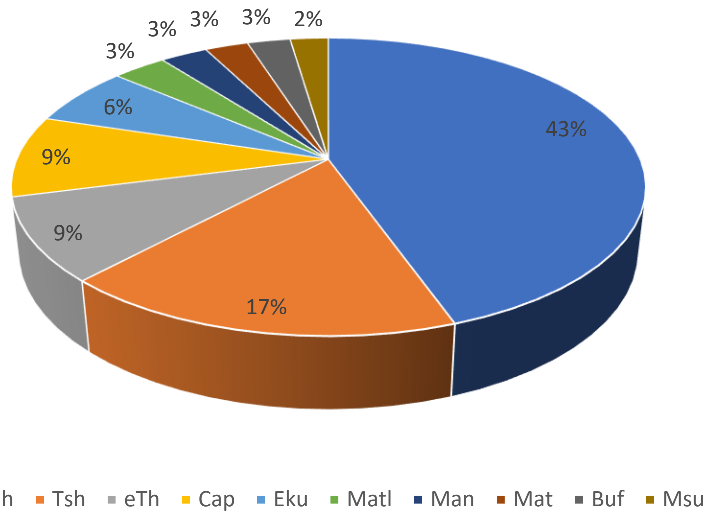


Figure 2: Estimated share in top 10 markets by mass for potatoes, Nov 2022

Source: SAUFM (2022)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R57 million (43%) followed by Tshwane at R22 million (17%), eThekwini at R11 million (9%), Cape Town at R10 million (8%), and Ekurhuleni at R7 million (6%). The Mangaung (R4.1 million), Buffalo City (R4 million) and Matlosana (R3.8 million) had the same share at 3% while Matjhabeng (R3.4 million) was at 2%. Msunduzi (R2 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

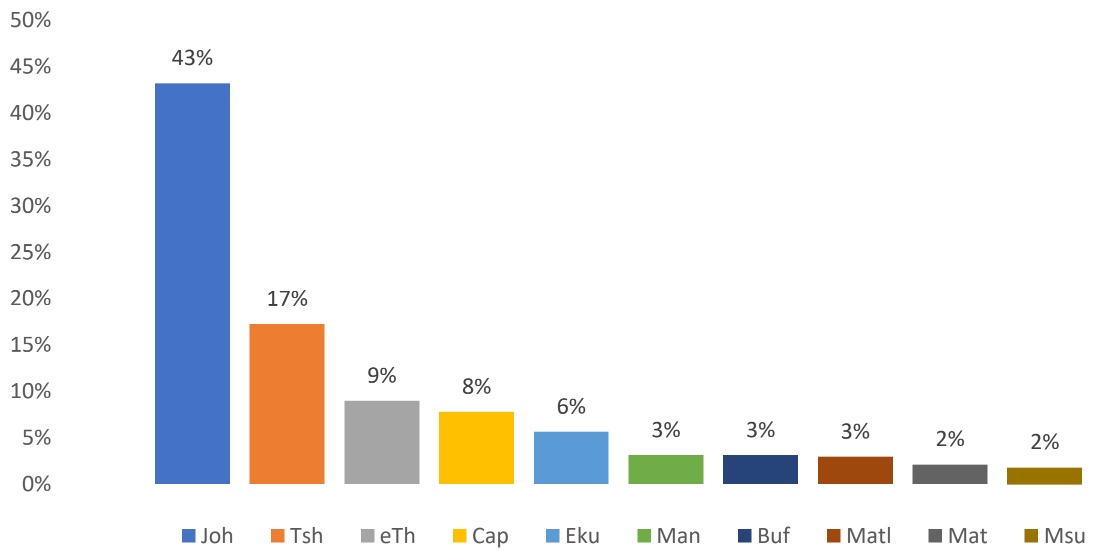


Figure 3: Estimated shares in revenue by top 10 markets for potatoes, Nov 2022

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 R56 million in revenue, derived from 5 500 MT in mass, followed by KZN at R10 million (958 MT), WC at R7 million (702 MT), EC at R3 million (343 MT), FS at R1 million (192 MT), NW at R886 065 (87 MT) and MP at R229 823 (22 MT).

The NC at R176 846 (17 MT) had the lowest share of smallholder farmers in onions. The overall share was R80 million and 7 820 MT.

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

Province	Revenue	Mass
GP	R56 440 973	5 500
KZN	R10 356 967	958
WC	R7 294 084	702
EC	R3 599 050	343
FS	R1 967 012	192
NW	R886 065	87
MP	R229 823	22
NC	R176 846	17

Source: SAUFM (2022)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in November 2022. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 3 963 MT (51%). It was followed by Tshwane at 1 335 MT (17%), eThekwini at 861 MT (11%), Cape Town at 702 MT (9%), and Buffalo City at 199 MT (3% MT). Other markets included Ekurhuleni (190 MT) and Gqeberha (123 MT) both at 2% with Mangaung (114 MT) and Msunduzi (97 MT) at 1%. Matlosana (87 MT) had the least share of smallholder farmers in onions among the top ten markets at 1%.

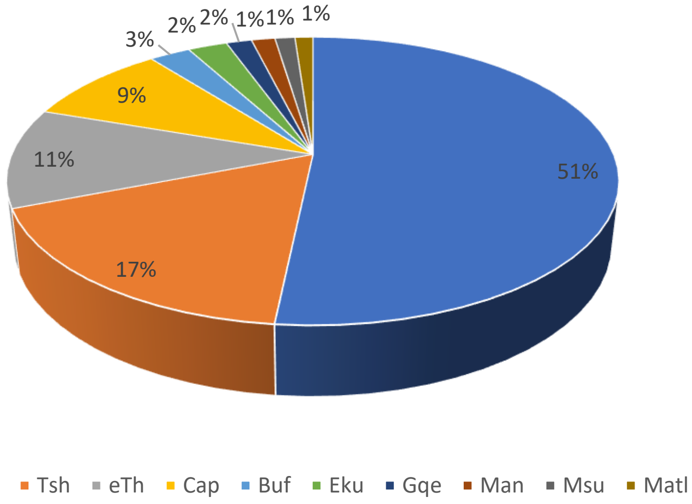


Figure 4: Estimated shares in top 10 markets by mass for onions, Nov 2022

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% (R40 million), followed by Tshwane at 17% (R13 million), eThekwini at 12% (R9 million), Cape Town at 9% (R7 million), Buffalo City at 3% (R2 million) with Ekurhuleni (R1.8 million) and Gqeberha (R1.4 million) at 2%. The Mangaung (R1.2 million) and Msunduzi (R1 million) also had the same share at 1%. Matlosana (R886 065) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

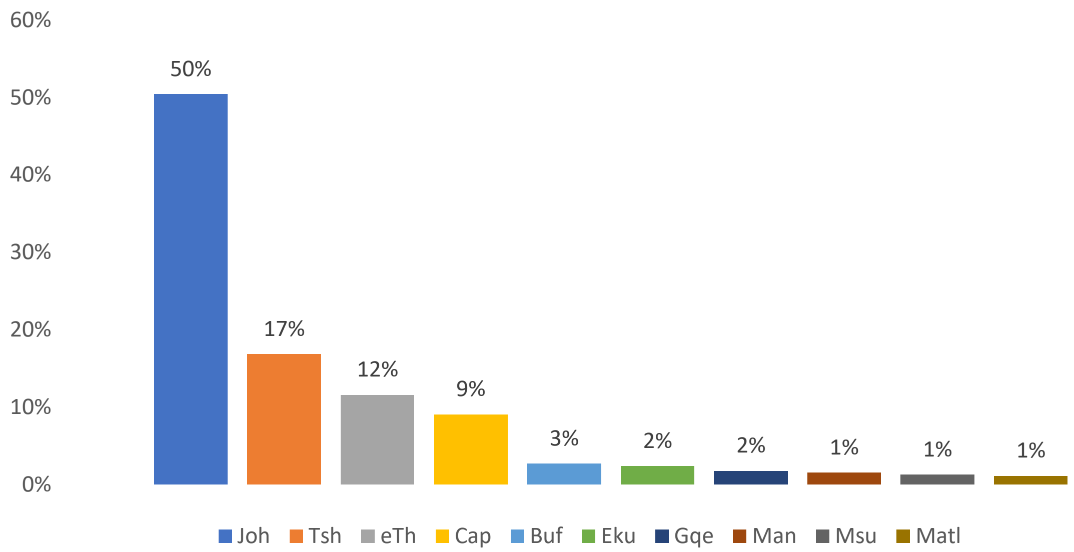


Figure 5: Estimated shares in revenue by top 10 markets for onions, Nov 2022

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 R36 million in revenue derived from a total mass of 4 416 MT, followed by WC at R9 million (848 MT), KZN at R4 million (505 MT), FS at R2 million (327 MT), EC at R1.8 million (228 MT), NW at R1.1 million (136 MT) and NC at R364 138 (53 MT). The MP province was at R52 375 (9 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 R56 million and 6 521 MT.

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

Province	Revenue	Mass
GP	R36 492 582	4 416
WC	R9 171 176	848
KZN	R4 684 532	505
FS	R2 934 212	327
EC	R1 847 293	228
NW	R1 147 172	136
NC	R364 138	53
MP	R52 375	9

Source: SAUFM (2022)

Tomatoes were the fourth largest traded commodity in terms of mass at fresh produce markets in November 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 49%, translated as 3 211 MT (see Figure 6). This market was followed by Tshwane at 977 MT (15%), Cape Town at 848 MT (13%), eThekwini at 446 MT (7%), Ekurhuleni at 229 MT (4%) and Mangaung at 3% (186 MT). Other markets among the top ten included Matjhabeng (141 MT), Matlosana (136 MT) and Gqeberha (118MT) with the same share at 2%. Buffalo City (110 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 2%.

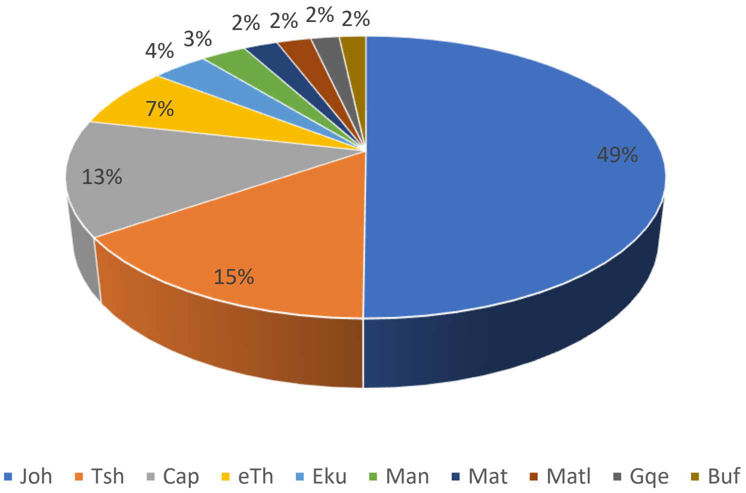


Figure 6: **Estimated share in top 10 markets by mass for tomatoes, Nov 2022**

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 46% (R26 million), Tshwane at 16% (R9 million), Cape Town at 15% (R8 million), eThekwini at 7% (R4 million) with Ekurhuleni (R1.77 million) and Mangaung (R1.73 million) at 3%. The Matjhabeng (R1.19 million), Matlosana (R1.14 million), and Gqeberha (R1 million) had the same share at 2%. Buffalo City (R828 423) had the lowest share of smallholder farmers in tomatoes among the top ten markets at 1%.

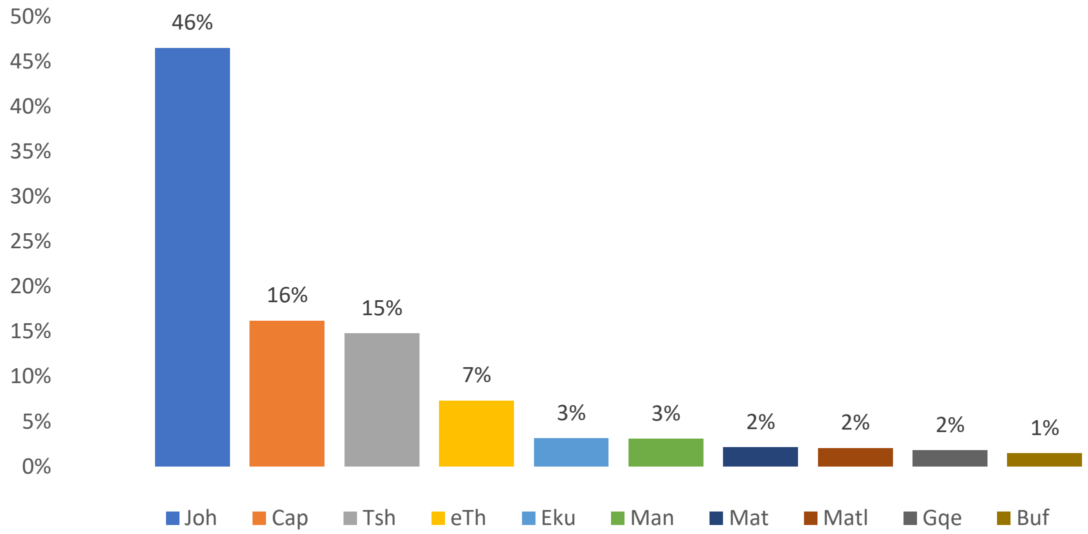


Figure 7: **Estimated share in revenue by top 10 markets for tomatoes, Nov 2022**

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 R33 million derived from a total mass of 4 850 MT, followed by WC at R9 million (1 364 MT), KZN at R8 million (1 084 MT), EC at R4 million (566 MT), FS at R3 million (421 MT) and NW at R1 million (164 MT).

The share of smallholder farmers in bananas in MP was estimated at R309 491 (40 MT) while NC had the lowest estimated share of smallholder farmers in bananas at R464 over the reported month. The estimated overall smallholder share for bananas was R60 million and 8 492 MT.

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

Province	Revenue	Mass
GP	R33 928 512	4 850
WC	R9 042 592	1 364
KZN	R8 147 634	1 084
EC	R4 351 992	566
FS	R3 268 503	421
NW	R1 307 390	164
MP	R309 491	44
NC	R464	0

Source: SAUFM (2022)

Bananas constituted the most traded fruit on the fresh produce market system in November 2022. The Johannesburg market commanded the largest share of smallholder farmers at 31% (2 640 MT) (see Figure 8). It was followed by Tshwane at 22% (1 881 MT), Cape Town at 13% (1 084 MT), eThekwini at 12% (1 031 MT) with Buffalo City (385 MT), Msunduzi (333 MT) and Ekurhuleni (310 MT) all at 4%. The Mangaung (308 MT) and Gqeberha (181 MT) both stood at 2%. Among the top ten markets Matlosana fresh produce market (164 MT) commanded the least estimated share of smallholder farmers at 2%.

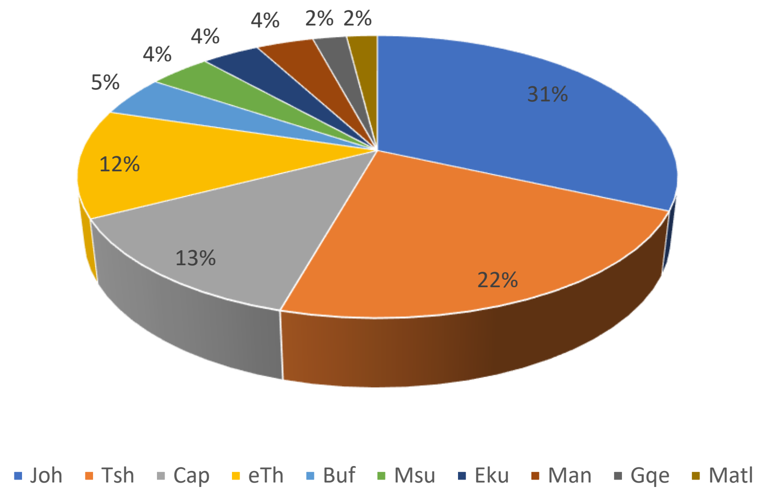


Figure 8: Estimated shares in top 10 markets by mass for bananas, Nov 2022

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% (R18 million) followed by Tshwane at 22% (R13 million), Cape Town at 15% (R9 million), eThekwini at 10% (R6 million) with Buffalo City (R2.8 million) and Ekurhuleni (R2.4 million) at 4% while Msunduzi (R2 million) and Mangaung (R1.9 million) were at 3%. The Gqeberha (R1.4 million) and Matlosana (R1.3 million) fresh produce markets had the least share at 2%.

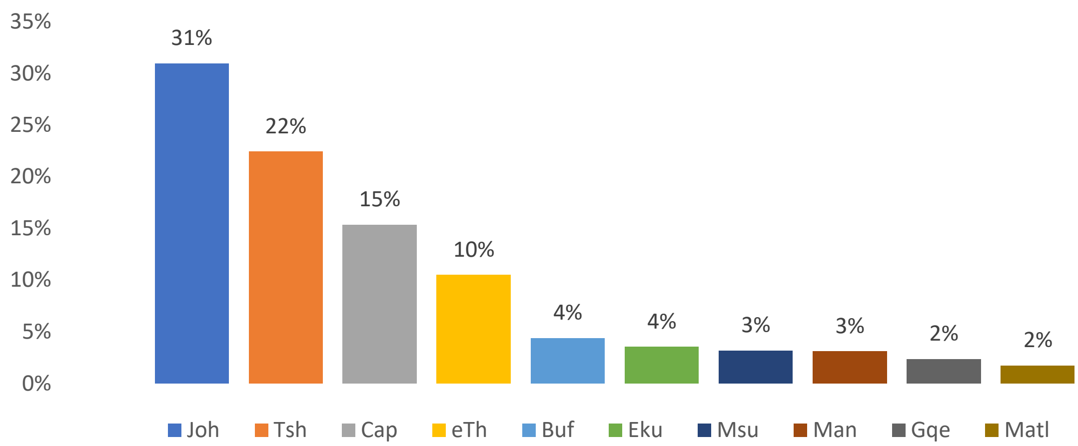


Figure 9: Estimated shares revenue by in top 10 markets for bananas, Nov 2022

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 14 359 MT. This market was followed by WC R12 million (1 571 MT), KZN at R7 million (1 303 MT), FS at R3 million (492 MT), EC at R2 million (781 MT), and North West at R1 million (358 MT).

The MP had an estimated share of other vegetables at R3148 679 (51 MT) while NC stood at R128 799 (53 MT). The overall share of smallholder farmers in other vegetables in Nov 2022 was R104 million and 18 951 MT.

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

Province	Revenue	Mass
GP	R75 632 382	14 359
WC	R12 665 245	1 571
KZN	R7 856 918	1303
FS	R3 831 416	492
EC	R2 866 283	781
NW	R1 577 783	358
MP	R148 679	51
NC	R128 799	36

Source: SAUFM (2022)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in November 2022 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 53% (10 090 MT) (see Figure 10), followed by Tshwane at 20% (3 806 MT), Cape Town at 8% (1 571 MT), eThekwini at 6% (1 177 MT) and Mangaung at 3% (529 MT). The Ekurhuleni (440 MT), Matlosana (358 MT) and Buffalo City (291 MT) had the same share at 2% while Matjhabeng was at 1% (252 MT). The Gqeberha commanded the lowest share of smallholder farmers among the top ten markets both at 1% (182 MT).

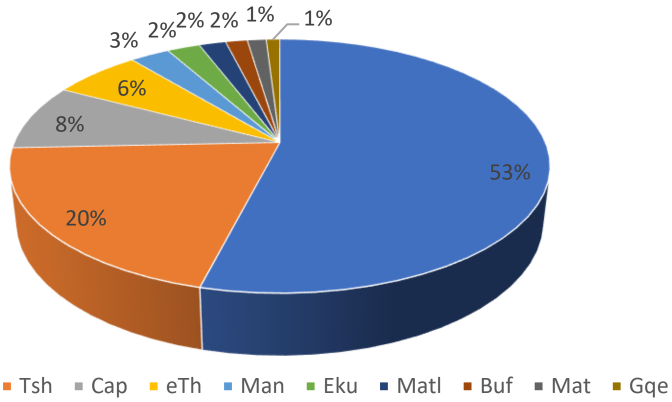


Figure 10: Estimated shares in top 10 markets by mass for other vegetables, Nov 2022

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 53% (R55 million), Tshwane at 18% (R18 million), Cape Town 12% (R12 million), eThekwini at 7% (R7 million) and Mangaung at 3% (R2 million). Other markets with the same share of 2% include Buffalo City (R1.8 million), Ekurhuleni (R1.6 million) and Matlosana (R1.5 million) while Matjhabeng (R1.1 million) stood at 1%. The Gqeberha (R1 million) had the least share of revenue for smallholder farmers among the top ten markets at 1%.

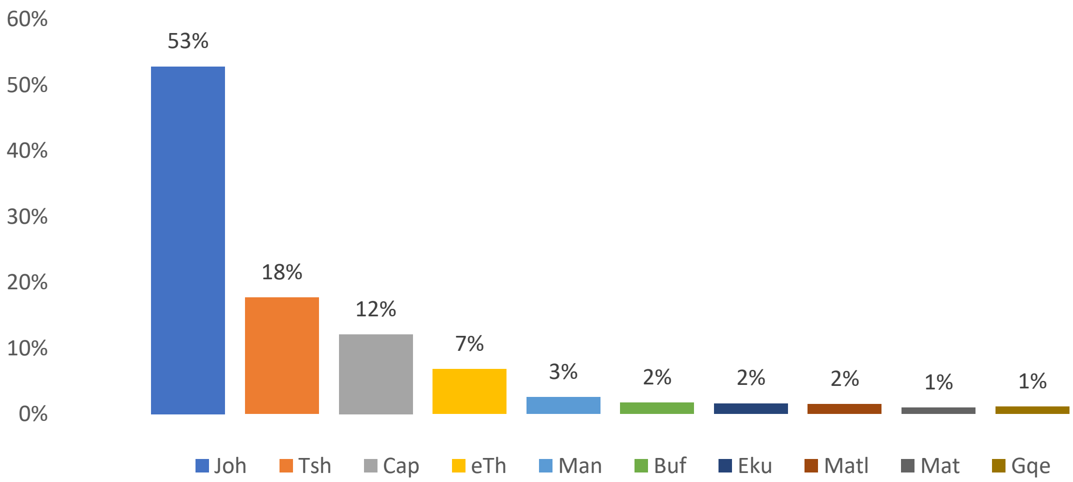


Figure 11: Estimated shares in revenue by markets for other vegetables, Nov 2022

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 November 2022. The GP province was leading with a revenue of R104 million derived from a total mass of 10 152 MT, followed KZN at R17 million (1 550 MT), WC at R16 million (1 525 MT), FS at R5 million (566 MT), EC at R2 million (308 MT), and NW at R1 million (510 MT).

The NC province had R148 679 (23 MT) while MP commanded the lowest estimated share of smallholder farmers in other fruits R128 799 (19 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R147 million matched by 14 653 MT.

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

Province	Revenue	Mass
GP	R104 231 548	10 152
WC	R16 235 052	1 525
KZN	R17 101 773	1 550
FS	R5 107 843	566
EC	R2 789 039	308
NW	R1 902 502	510
NC	R148 679	23
MP	R128 799	19

Source: SAUFM (2022)

Market shares for other fruits traded in the various fresh produce markets in November 2022 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 43% (6 274 MT) (see Figure 12), followed by Tshwane at 23% (3 305 MT), Cape Town at 11% (1 550 MT), eThekwini at 9% (1 247 MT), Ekurhuleni at 4% (551 MT) with Matlosana (510 MT) and Mangaung (382 MT) at 3%. Other markets had the same share at 2% and they included Msunduzi (278 MT) and Buffalo City (261 MT). Matjhabeng fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 1% (184 MT).

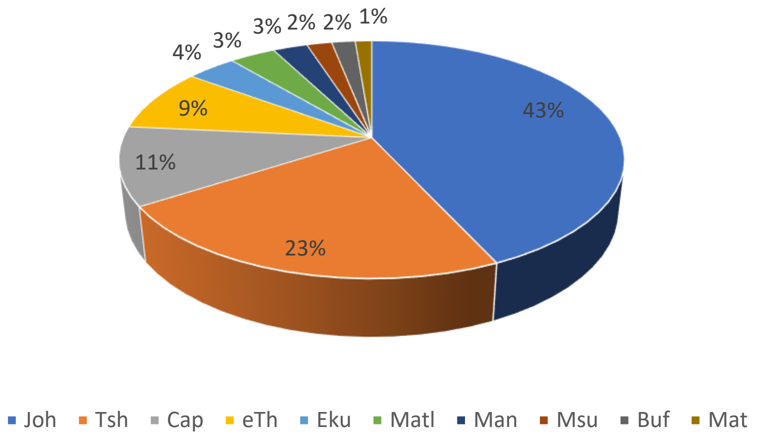


Figure 12: Estimated shares in top 10 markets by mass for other fruits, Nov 2022

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% (R70 million), Tshwane at 20% (R30 million), Cape Town at 12% (R17 million), eThekwini at 9% (R14 million), and Mangaung at 3% (R3.7 million). The Ekurhuleni (R3.3 million), Buffalo City (R2.3 million) and Msunduzi (R2.2 million) had the same share at 2% while Matlosana (R1.9 million) was at 1%. Matjhabeng had the lowest share of smallholder farmers among the top ten fresh produce markets at 1% (R1.3 million).

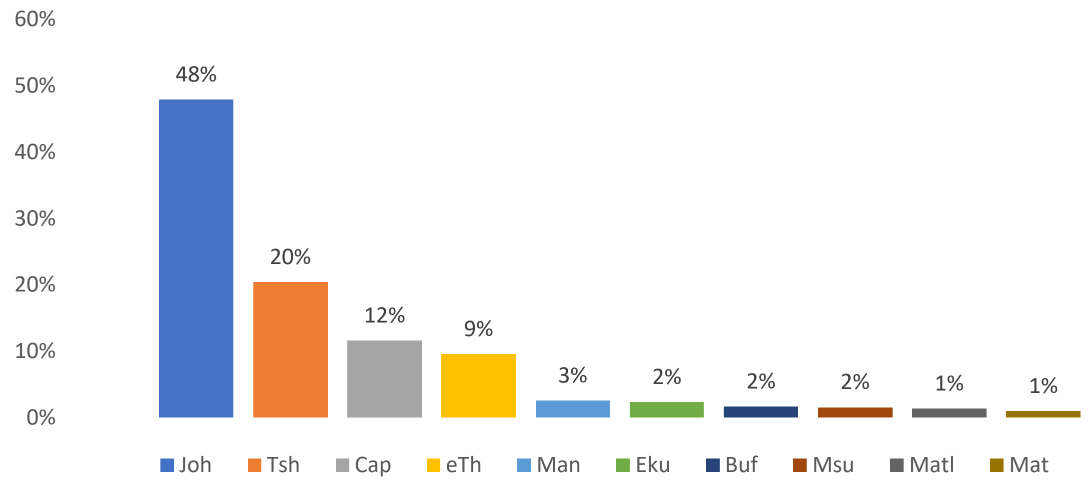
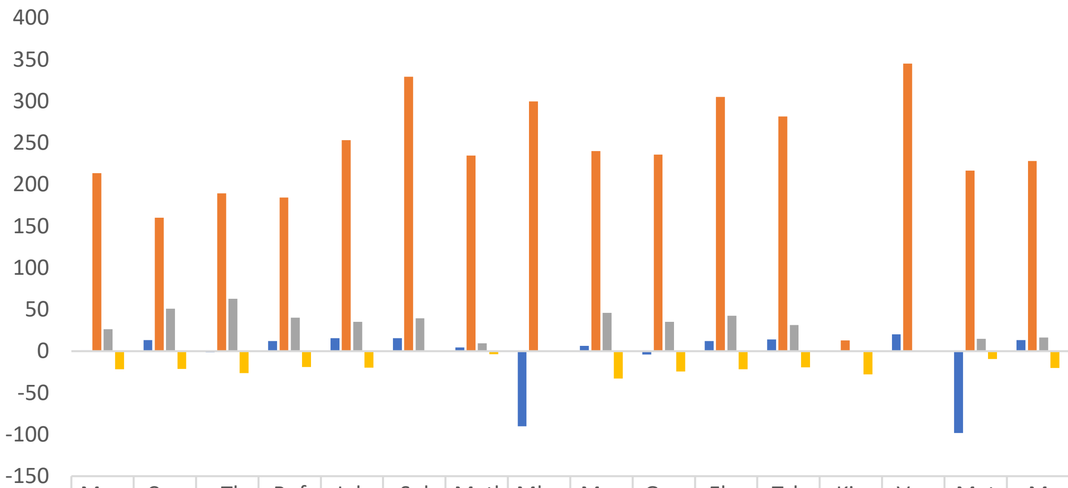


Figure 13: Estimated shares in revenue by top 10 markets for other fruits, Nov 2022

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 November 2021 and 2022. The average price change for potatoes was 11% ranging from -98% in Matjhabeng to 20% in Vereening. This was followed by onions with an average price change of 235% over the reported period, ranging from 13% in Kie to 329% in Sol Plaatjie. Tomatoes had an average price change at 38% with the lowest change at 15% in Matlosana and maximum at 63% in eThekwini. Finally, bananas had an average price change of -21%, ranging from -33% in Msunduzi to -3% in Matlosana. Overall, all the markets exhibit positive price changes for onions and tomatoes wile a significant decline was observed in the price changes for bananas.



	Man	Cap	eTh	Buf	Joh	Sol	Matl	Mbo	Msu	Gqe	Eku	Tsh	Kie	Ver	Mat	eMa
Potatoes	1	13	-1	12	16	16	5	-90	6	-4	12	14	0	20	-98	13
Onions	213	160	189	184	253	329	235	300	240	236	305	282	13	345	217	228
Tomatoes	26	51	63	40	35	39	10	0	46	35	43	31	0	0	15	16
Bananas	-22	-21	-26	-19	-20	0	-3	0	-33	-24	-22	-19	-28	0	-10	-20

Figure 14: Price trends for top four traded agricultural products in Nov 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 November 2022 the total mass traded from the NFPMs was 287 903 MT, generating a total revenue of R1.94 billion. Thirty percent (smallholder share) of this was estimated at 88 371 MT matched by R583 million in revenue. GP was leading at 59 303 MT matched by a revenue of R395 million. This was followed by WC at 8 310 MT (R65 million), KZN at 8 938 MT (R62 million), FS at 3 881 MT (R24 million), EC at 3 215 MT (R21 million), NW at 2 207 MT (R10 million) and MP at 307 MT (R1.6 million). The NC had the lowest share from smallholder farmers at 212 MT (R1.2 million). 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 39 064 MT (R269 million) followed by Tshwane at 16 327 MT (R106 million), Cape Town at 8 310 MT (R65 million), eThekwini at 7 373 MT (R52 million), Ekurhuleni at 3 584 MT (R18 million), Mangaung at 2 353 MT (R15 million), Buffalo City at 2 003 MT (R14 million), Matlosana at 2 207 MT (R10 million), Msunduzi at 1 565 MT (R9 million) and Matjhabeng 1 528 MT (R8 million). Product-wise, potatoes commanded followed by onions, tomatoes, and bananas. A significant volume of other fruits and vegetables was traded in the national fresh produce market system over the reported period. Other vegetables and fruits were at R112 million (17 693 MT) and R133 million (15 963 MT), respectively. The markets exhibited positive price changes for onions and tomatoes wile a significant decline was observed in the price changes for bananas.

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