NAMC

Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

OCTOBER 2022

National Agricultural Marketing Council

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TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

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 October 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 – OCT 22

In Oct 2022 the total mass traded from the NFPMs was 293 668 MT, generating a total revenue of R1.77 billion (see Table 1). This indicates 8% (21 572 MT) growth in volume and 1.02% (R18 million) decline 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 Oct 2022

Commodity	Revenue	Mass
Total	R1 777 113 270	293 668
Potatoes	R345 858 931	101 309
Onions	R253 186 444	26 053
Tomatoes	R168 776 329	23 680
Bananas	R189 230 908	30 442
Other vegetables	R374 708 093	58 975
Other fruit	R445 352 564	53 209

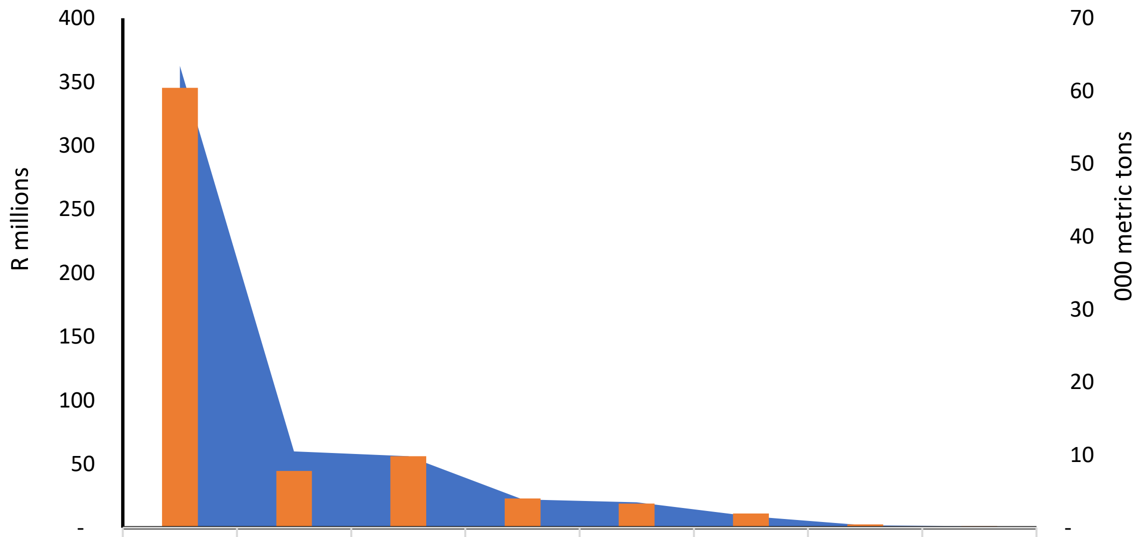
Source: SAUFM (2022)

Potatoes had a total mass of 101 309 MT, indicating an increase of 20% compared to the same month in the previous year. Their revenue declined by 41% during the same period to reach

R345 million. The total mass for onions decreased by 23% (7 473 MT) to reach 26 053 MT in October 2022. But the revenue grew by 186% (R164 million) to reach R253 million. Tomatoes had a total mass of 23 680 MT, indicating a decrease by 4% (translated as 900 MT). This traded mass was matched by a total revenue of R168 million, indicating 21% decrease compared to the previous year. Bananas showed a massive increase of 65% (11 469 MT) in mass traded, matched by increase of R33 million in revenue to reach R189 million in October 2022. Other vegetables traded in the system recorded a decrease of 10% (6 032 MT) in mass matched by an increase of 5% (R18 million) in revenue. The other fruits recorded an increase of 18% (7 841 MT) to reach a total traded mass of 53 209 MT in October 2022. The revenue of these fruits also grew by 12% (R45 million) to reach R445 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	362605 4	59959 59	56116 92	22255 02	20054 60	8998 697	2001 003	1142 690
Mass	60 454	7 793	9 817	4 025	3 334	1 970	461	247

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

For the entire month of October 2022, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 88 100 MT and R533 million, respectively. A further analysis of this at the provincial level show that GP was leading at 60 454 MT matched by a revenue of R363 million (See Figure 1). This was followed by WC at 7 793 MT (R59 million), KZN at 9 817 MT (R56 million), FS at 4 025 MT (R22 million), EC at 3 334 MT (R20 million), NW at 1 970 MT (R8 million) and MP at 461 MT (R2 million). The NC had the lowest share from smallholder farmers at 247 MT (R1 million).

In terms of market analysis, the Johannesburg market commanded the list of the top ten fresh produce markets at 38 981 MT (R244 million) followed by Tshwane at 17 427MT (R99 million), Cape Town at 7 793 MT (R59 million), eThekwini at 8 072 MT (R47 million), Ekurhuleni at 3 544 MT (R15 million), Mangaung at 2 528 MT (R14 million), Buffalo City at 2 069 MT (R12 million), Matlosana at 1 970 MT (R8 million), Msunduzi at 1 745 MT (R8 million) and Matjhabeng 1 498 MT (R7 million) (see table 2).

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

Market	Revenue	Mass (MT)
Johannesburg	244 827 855	38 981
Tshwane	99 875 790	17 427
Cape Town	59 959 592	7 793
eThekwini	47 566 809	8 072
Ekurhuleni	15 887 641	3 544
Mangaung	14 661 056	2 528
Buffalo City	12 448 494	2 069
Matlosana	8 998 697	1 970
Msunduzi	8 550 119	1 745
Matjhabeng	7 593 966	1 498
Gqeberha	7 557 209	1 241
Vereeniging	2 014 153	501
eMalahleni	1 364 287	296
Sol Plaatje	1 142 690	247
Mbombela	636 716	165
Kei	48 906	24

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 R67 million derived from 20 255 MT (see Table 3). This was followed by KZN at R12 million (3 454 MT), WC at R8 million (2 310 MT), FS at R5.4 million (1 593 MT), EC at R5.8 million (1 364 MT) and NW at R2 million (981 MT). The NC was at R1 million (329 MT) while MP at R396 853 (107 MT). The overall share in potatoes was R103 million (30 393 MT).

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

Province	Revenue	Mass
GP	R67 140 034	20 255
KZN	R12 131 279	3 454
WC	R8 761 030	2 310
FS	R5 405 716	1 593
EC	R5 805 280	1 364
NW	R2 917 928	981
MP	R396 853	107
NC	R1 199 558	329

Source: SAUFM (2022)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 12 826 MT (42%), followed by Tshwane at 5 201 MT (17%), eThekwini at 2 669 MT (9%), Cape Town at 2 310 MT (8%) and Ekurhuleni at 1 884 MT (6%). Other markets in the top ten included Matlosana (981 MT), Mangaung (888 MT), Buffalo City (825 MT) and Msunduzi (785 MT) all at 3%. Matjhabeng (705 MT) had the least share in potatoes among the top ten markets at 2%.

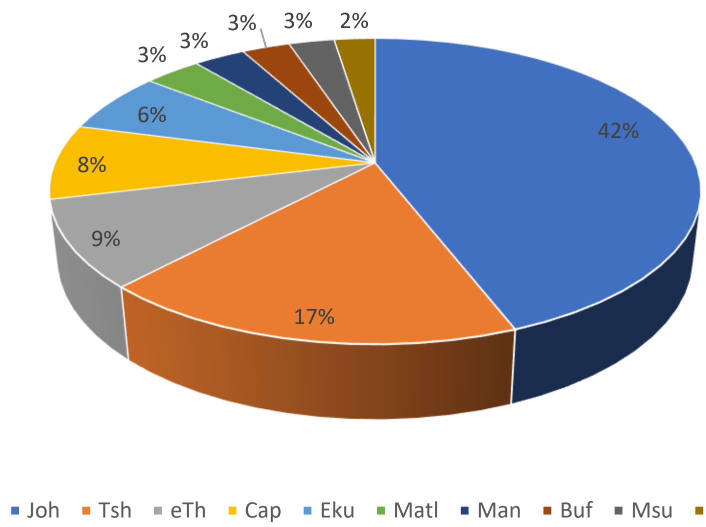


Figure 2: Estimated share in top 10 markets by mass for potatoes, October 2022

Source: SAUFM (2022)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R42 million (41%) followed by Tshwane at R17 million (17%), eThekwini at R9 million (9%), Cape Town at R8 million (8%), and Ekurhuleni at R5 million (6%). The Mangaung (R3.3 million), Buffalo City (R3.2 million) and Matlosana (R2.9 million) had the same share at 3%. Msunduzi (2.5 million) and Matjhabeng (R2.4 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

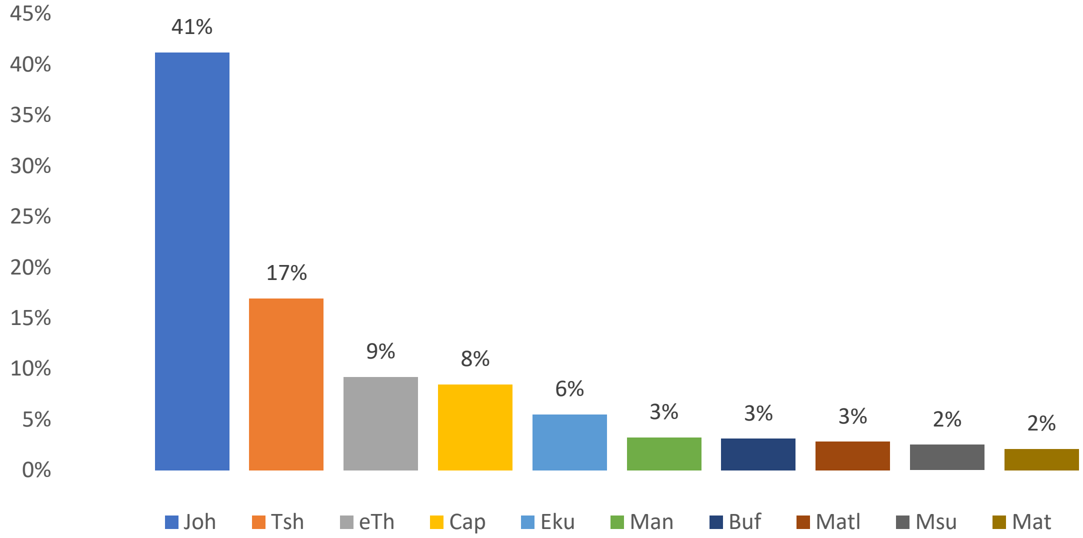


Figure 3: Estimated shares in revenue by top 10 markets for potatoes, October 2022

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 R52 million in revenue, derived from 5 618 MT in mass, followed by KZN at R9 million (864 MT), WC at R7 million (697 MT), EC at R3 million (305 MT), FS at R2 million (204 MT), NW at R914 849 (99 MT) and MP at R235 911 (24 MT).

The NC at R56 159 (5 MT) had the lowest share of smallholder farmers in onions. The overall share was R75 million and 7 816 MT.

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

Province	Revenue	Mass
GP	R52 419 506	5 618
KZN	R9 113 751	864
WC	R7 677 812	697
EC	R3 461 767	305
FS	R2 076 177	204
NW	R914 849	99
MP	R235 911	24
NC	R56 159	5

Source: SAUFM (2022)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in October 2022. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 4 166 MT (53%). It was followed by Tshwane at 1 265 MT (16%), eThekwini at 762 MT (10%), Cape Town at 697 MT (9%), and Buffalo City at 2% (204 MT). Other markets included Ekurhuleni at 181 MT (2%), Mangaung (169 MT) and Gqeberha (125 MT) all at 2%. Msunduzi (124 MT) and Matlosana (102 MT) had the least share of smallholder farmers in onions among the top ten markets at 1%.

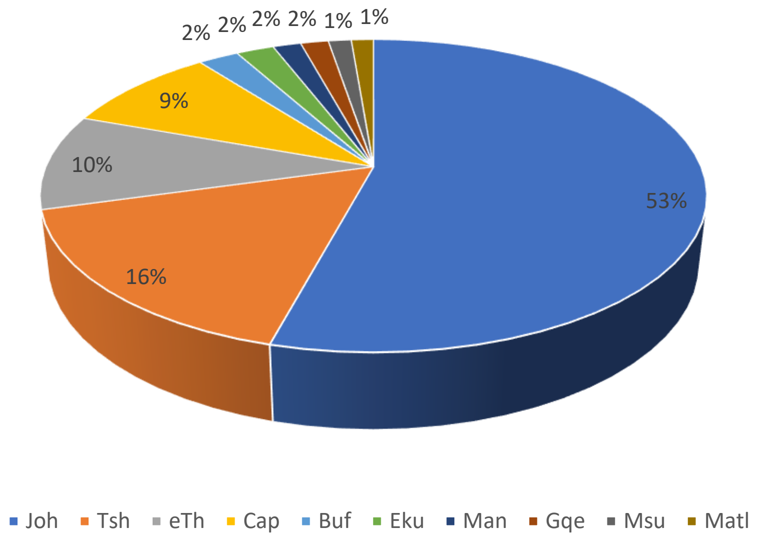


Figure 4: Estimated shares in top 10 markets by mass for onions, October 2022

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 51% (R38 million), followed by Tshwane at 16% (R11 million), eThekwini at 11% (R8 million), Cape Town at 10% (R7 million), Buffalo City at 3% (R2 million) and Ekurhuleni (R1.6 million). The Gqeberha (R1.3 million), Mangaung (R1.2 million), all at 2%. The Msunduzi (R996 249) and Matlosana (R914 848) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

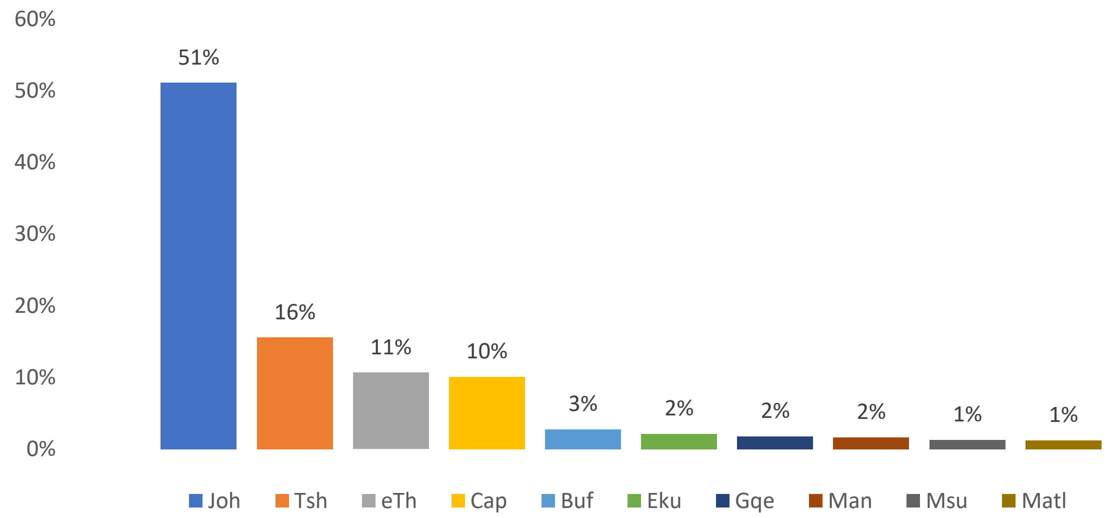


Figure 5: Estimated shares in revenue by top 10 markets for onions, October 2022

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 R32 million in revenue derived from a total mass of 4 726 MT, followed by WC at R7 million (918 MT), KZN at R4 million (713 MT), FS at R2 million (323 MT), EC at R1.8 million (231 MT), NW at R1 million (124 MT) and NC at R326 528 (56 MT). The MP province was at R81 730 (13 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 R50 million and 7 104 MT.

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

Province	Revenue	Mass
GP	R32 349 435	4 726
WC	R7 696 507	918
KZN	R4 582 543	713
FS	R2 728 643	323
EC	R1 837 961	231
NW	R1 029 552	124
NC	R326 528	56
MP	R81 730	13

Source: SAUFM (2022)

Tomatoes were the fourth largest traded commodity in terms of mass at fresh produce markets in October 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 47%, translated as 3 308 MT (see Figure 6). This market was followed by Tshwane at 1 137 MT (16%), Cape Town at 918 MT (13%), eThekwini at 639 MT (9%), Ekurhuleni at 4% (275 MT) and Mangaung at 3% (182 MT). Other markets among the top ten included Matjhabeng (142 MT), Matlosana (124 MT) and Buffalo City (122 MT) all at 2%. The Gqeberha (109 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 2%.

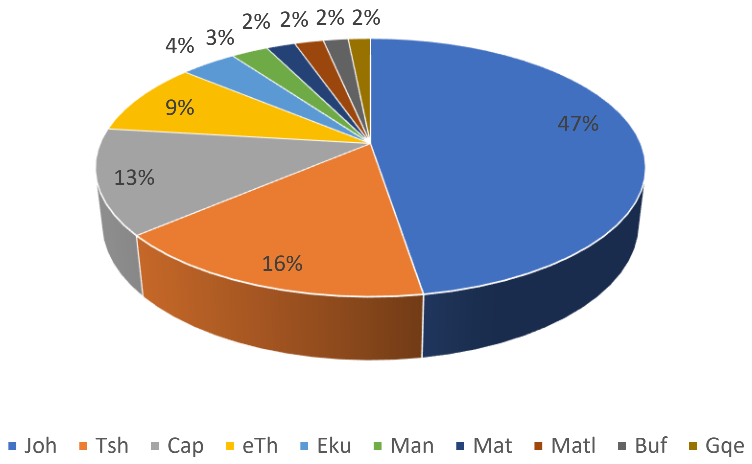


Figure 6: Estimated share in top 10 markets by mass for tomatoes, October 2022

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 45% (R22 million), Tshwane at 16% (R8 million), Cape Town at 15% (R7 million), eThekwini at 8% (R4 million), Mangaung at 3% (R1.54 million) and Ekurhuleni also at 3% (R1.4 million). The Matjhabeng (R1.1 million), Matlosana (R1 million), and Gqeberha (R992 544) had the same share at 2%. Buffalo City (R845 416) had the lowest share of smallholder farmers in tomatoes among the top ten markets.

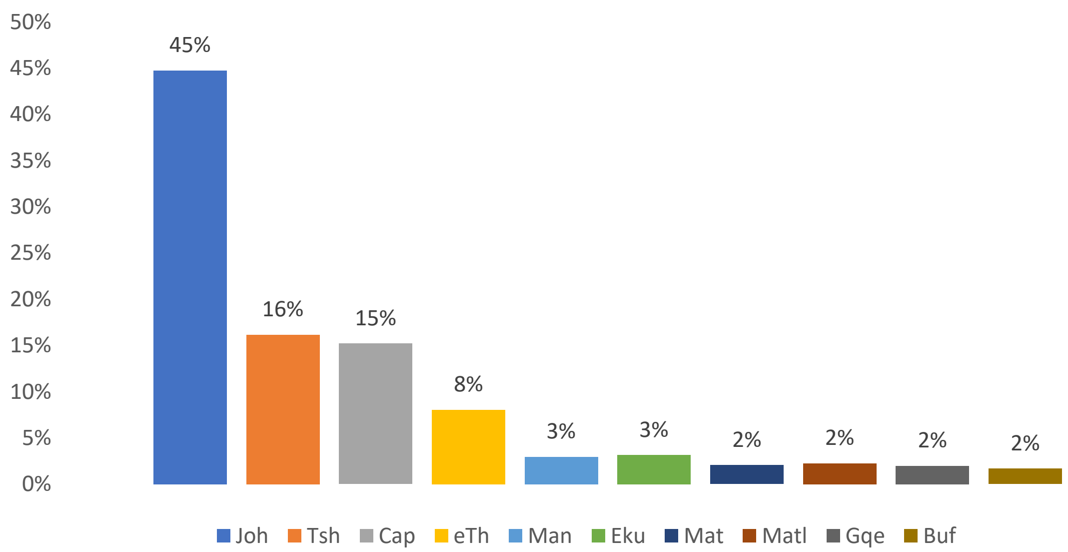


Figure 7: Estimated share in revenue by top 10 markets for tomatoes, October 2022

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 R32 million derived from a total mass of 5 322 MT, followed by WC at R8 million (1 468 MT), KZN at R7 million (1 150 MT), EC at R3 million (572 MT), FS at R2 million (418 MT) and NW at R986 494 (162 MT).

The share of smallholder farmers in bananas in MP was estimated at R259 768 (41 MT) while NC had the lowest estimated share of smallholder farmers in bananas at R87 over the reported month. The estimated overall smallholder share for bananas was R56 million and 9 133 MT.

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

Province	Revenue	Mass
GP	R32 718 415	5 322
WC	R8 704 759	1 468
KZN	R7 757 602	1 150
EC	R3 831 011	572
FS	R2 511 137	418
NW	R986 494	162
MP	R259 768	41
NC	R87	0

Source: SAUFM (2022)

Bananas constituted the most traded fruit on the fresh produce market system in October 2022. The Johannesburg market commanded the largest share of smallholder farmers at 31% (2 833 MT) (see Figure 8). It was followed by Tshwane at 23% (2 083 MT), Cape Town at 13% (1 150 MT), eThekwini at 12% (1 106 MT) with Buffalo City (398 MT), Msunduzi (362 MT) and Ekurhuleni (339 MT) all at 4%. The Mangaung (293 MT) and Gqeberha (174 MT) stood at 2%

and 1%, respectively. Among the top ten markets Matlosana fresh produce market (162 MT) commanded the least estimated share of smallholder farmers at 2%.

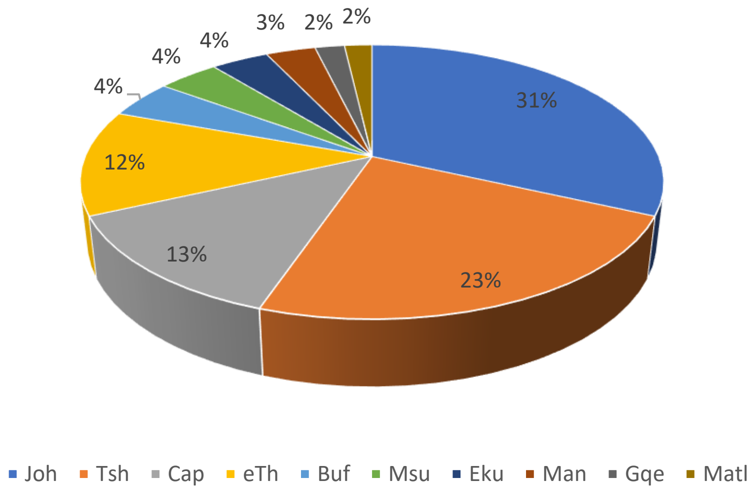


Figure 8: Estimated shares in top 10 markets by mass for bananas, October 2022

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% (R17 million) followed by Tshwane at 22% (R12 million), Cape Town at 15% (R8 million), eThekwini at 10% (R5 million) with Buffalo City (R2.4 million) and Ekurhuleni (R2 million) at 4% while Msunduzi (R1.79 million) and Mangaung (R1.75 million) were at 3%. The Gqeberha (R1.3 million) and Matlosana (R986 539) fresh produce markets had the least share at 3%.

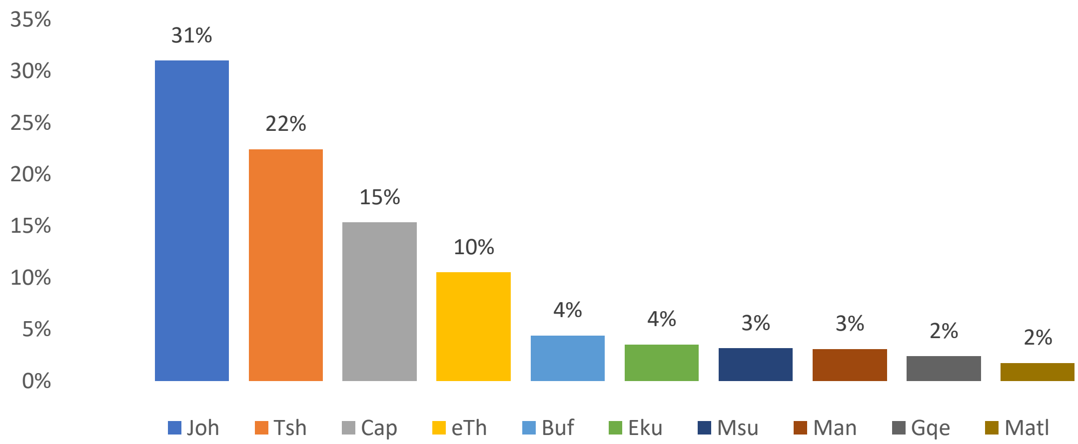


Figure 9: Estimated shares revenue by in top 10 markets for bananas, October 2022

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 R81 million derived from a total mass of 13 158 MT. This market was followed by WC R13 million (1 444 MT), KZN at R8 million (1 335 MT), EC at R3.8 million (507 MT), FS at R3 million (779 MT), and North West at R1 million (372 MT).

The MP had an estimated share of other vegetables at R38 149 (44 MT) while NC stood at R55 266 (53 MT). The overall share of smallholder farmers in other vegetables in October 2022 was R112 million and 17 693 MT.

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

Province	Revenue	Mass
GP	R81 268 072	13 158
WC	R13 892 589	1 444
KZN	R8 334 231	1 335
EC	R3 833 303	507
FS	R3 011 062	779
NW	R1 679 486	372
MP	R138 149	44
NC	R55 266	53

Source: SAUFM (2022)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in October 2022 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 51% (9 002 MT) (see Figure 10), followed by Tshwane at 21% (3 714 MT), Cape Town at 8% (1 444 MT), eThekwini at 7% (1 226 MT) and Mangaung at 3% (539 MT). The Ekurhuleni (408 MT), Matlosana (372 MT) and Buffalo City (271 MT) and had the same share at 2% while Matjhabeng was at 1% (240 MT). The Gqeberha commanded the lowest share of smallholder farmers among the top ten markets both at 1% (221 MT).

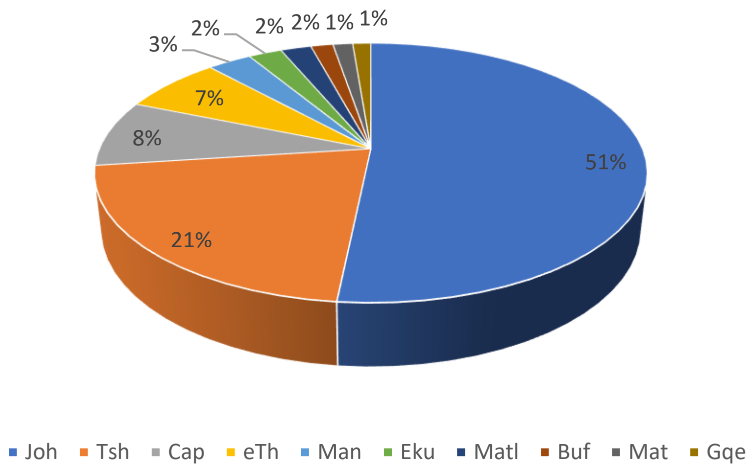


Figure 10: Estimated shares in top 10 markets by mass for other vegetables, October 2022

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% (R58 million), Tshwane at 18% (R20 million), Cape Town 12% (R13 million), eThekwini at 7% (R7 million) and Mangaung at 2% (R2 million), Other markets with the same share of 2% include Ekurhuleni (R1.7 million) and Buffalo City (R1.6 million) while Matlosana (R1.2 million) and Gqeberha (R1.1 million) stood at 1%. The Matjhabeng had the least share of revenue for smallholder farmers among the top ten markets at 1% (R634 858).

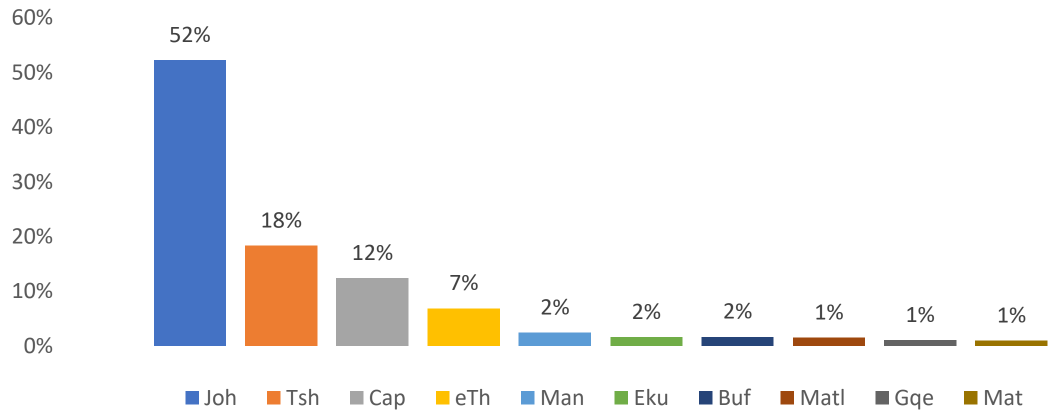


Figure 11: Estimated shares in revenue by markets for other vegetables, October 2022

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 October 2022. The GP province was leading with a revenue of R96 million derived from a total mass of 11 375 MT, followed KZN at R14 million (1 983 MT), WC at R13 million (1 274 MT), FS at R5 million (709 MT), EC at R2 million (355 MT), and NW at R1 million (232 MT).

The NC province had R138 149 (26 MT) while MP commanded the lowest estimated share of smallholder farmers in other fruits R55 266 (9 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R133 million matched by 15 963 MT.

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

Province	Revenue (R)	Mass (MT)
GP	R96 709 976	11 375
KZN	R14 197 522	1 983
WC	R13 226 895	1 274
FS	R5 300 482	709
EC	R2 507 092	355
NW	R1 470 388	232
NC	R138 149	26
MP	R55 266	9

Source: SAUFM (2022)

Market shares for other fruits traded in the various fresh produce markets in October 2022 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 43% (6 845 MT) (see Figure 12), followed by Tshwane at 25% (4 027 MT), eThekwini at 10% (1 670 MT), Cape Town at 8% (1 274 MT) with Mangaung (502 MT) and Ekurhuleni (470 MT) at 3%. Other markets had the same share at 2% and they included

Msunduzi (313 MT) and Buffalo City (273 MT) while Matlosana (232 MT) was at 1%. Matjhabeng fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 1% (207 MT).

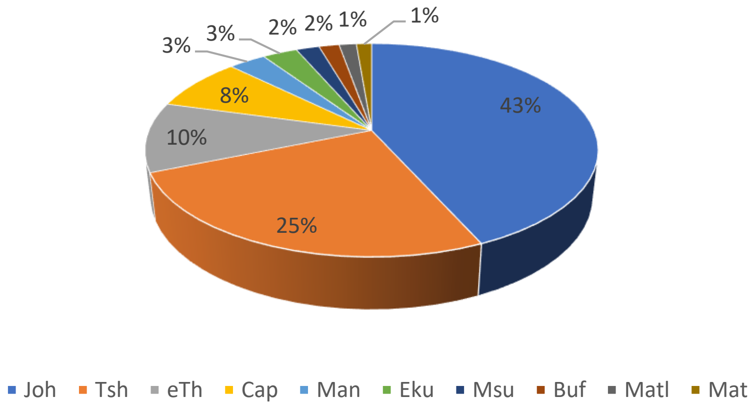


Figure 12: Estimated shares in top 10 markets by mass for other fruits, October 2022

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% (R64 million), Tshwane at 22% (R28 million), eThekwini at 10% (R13 million), Cape Town at 9% (R12 million) and Mangaung at 3% (R3.9 million). The Ekurhuleni (R3.1 million), Buffalo City (R2.03 million) and Msunduzi (R2.01 million) had the same share at 2% while Matlosana (R1.4 million) was at 1%. Matjhabeng had the lowest share of smallholder farmers among the top ten fresh produce markets at 1% (R1.3 million).

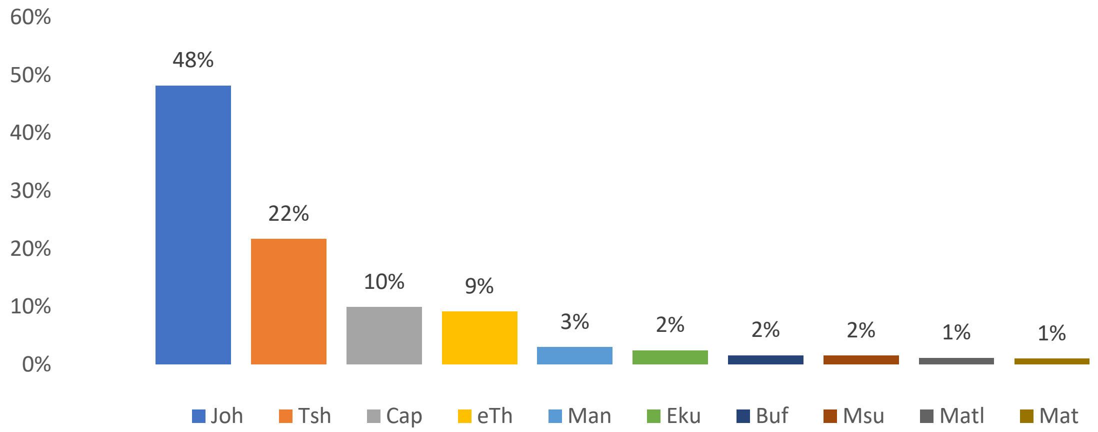
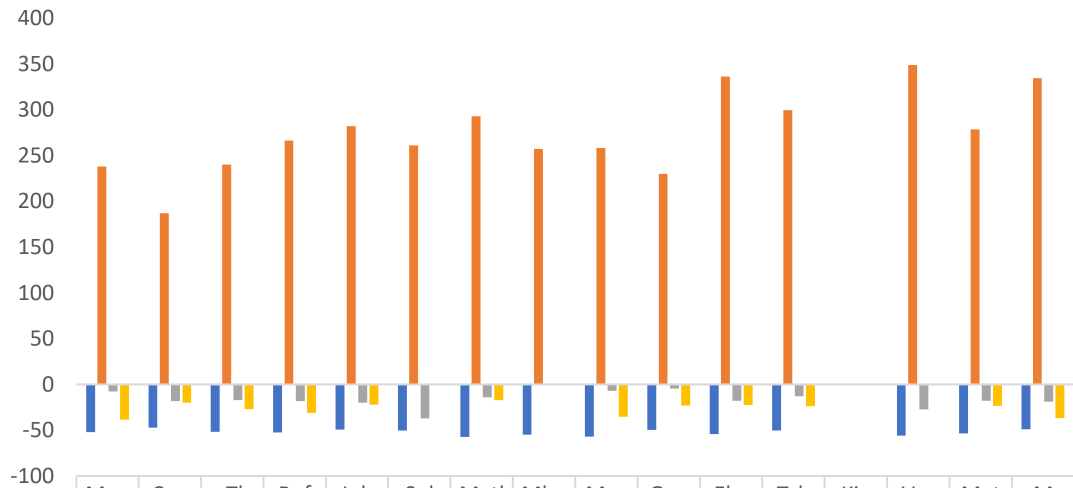


Figure 13: Estimated shares in revenue by top 10 markets for other fruits, October 2022

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 October 2021 and 2022. The average price change for potatoes was - 51% ranging from -57% in Msunduzi and Gqeberha to -47% in Tshwane. This was followed by onions with an average price change of 268% over the reported period, ranging from 187% in Cape town to 349% in Vereening. Tomatoes an average price change at -17% with the lowest change at -37% in eMalahleni and maximum at -4% in Gqeberha. Finally, bananas had an average price change of -24%, ranging from -38% in Mangaung to -17% in Matlosana. No price changes were observed in this commodity in four (Sol Plaatjie, Mbombela, Kie and Vereening) fresh produce markets. Overall, all the markets exhibit positive price changes for onions and no price change in Kie fresh produce market.



	Man	Cap	eTh	Buf	Joh	Sol	Matl	Mbo	Msu	Gqe	Eku	Tsh	Kie	Ver	Mat	eMa
Potatoes	-52	-47	-52	-52	-49	-50	-57	-55	-57	-50	-54	-50	0	-56	-54	-49
Onions	238	187	240	266	282	261	293	257	258	230	336	300	0	349	278	334
Tomatoes	-8	-18	-17	-18	-20	-37	-14	0	-7	-4	-18	-13	0	-27	-18	-19
Bananas	-38	-20	-27	-31	-22	0	-17	0	-35	-23	-22	-24	0	0	-23	-37

Figure 14: Price trends for top four traded agricultural products in October 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 October 2022 the total mass traded from the NFPMs was 293 668 MT, generating a total revenue of R1.77 billion. Thirty percent (smallholder share) of this was estimated at 88 100 MT matched by R533 million in revenue. GP was leading at 60 454 MT matched by a revenue of R363 million, followed by WC at 7 793 MT (R59 million), KZN at 9 817 MT (R56 million), FS at 4 025 MT (R22 million), EC at 3 334 MT (R20 million), NW at 1 970 MT (R8 million) and MP at 461 MT (R2 million). The NC had the lowest share of smallholder farmers at 247 MT (R1 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 38 981 MT (R244 million) followed by Tshwane at 17 427MT (R99 million), Cape Town at 7 793 MT (R59 million), eThekwini at 8 072 MT (R47 million), Ekurhuleni at 3 544 MT (R15 million), Mangaung at 2 528 MT (R14 million), Buffalo City at 2 069 MT (R12 million), Matlosana at 1 970 MT (R8 million), Msunduzi at 1 745 MT (R8 million) and Matjhabeng 1 498 MT (R7 million)

By type of agricultural product, potatoes commanded the largest share at potatoes was R103 million (30 393 MT) followed by onions at R75 million (7 816 MT), tomatoes at R50 million (7 104 MT) and bananas at R56 million (9 133 MT). Other vegetables and fruits were at R112 million (17 693 MT) and R133 million (15 963 MT), respectively. Overall, all the markets exhibit positive price changes for onions and no price change in Kie fresh produce market.

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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, Mr Bhekani Zondo and Mr Kayalethu Sotsha.
Sandra Wolfaardt is acknowledged for assistance provided to the NAMC in terms of NFPM data.

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