SMALLHOLDER MARKET ACCESS ESTIMATES

DECEMBER 2022

National Agricultural Marketing Council

www.namc.co.za

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 December 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. Unfortunately, no produce was sold in Kie fresh produce market over the reported month. 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 – DEC 22

In December 2022 the total mass traded from the NFPMs was 278 650 MT, generating a total revenue of R2.06 billion (see Table 1). This indicates 2.74 % (7 848 MT) decline in volume and 17% (R293 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 Dec 2022

Commodity	Revenue	Mass
Total	R2 068 216 629	278 650
Potatoes	R506 266 460	89 795
Onions	R276 185 489	32 163
Tomatoes	R193 627 994	20 586
Bananas	R192 810 801	26 201
Other vegetables	R397 123 682	61 909
Other fruit	R502 202 203	47 996

Source: SAUFM (2022)

Potatoes had a total mass of 89 795 MT, indicating an increase of 9.38% compared to the same month in the previous year. Their revenue increase by 22.26% during the same period to reach R506 million. The total mass for onions decreased by 5.07% (1 719 MT) to reach 32 163 MT in December 2022. But the revenue grew by 119% (R150 million) to reach R276 million. Tomatoes had a total mass of 20 586 MT, indicating a decrease by 18 % (translated as 3 252 MT). This traded mass was matched by a total revenue of R193 million, indicating 7.44% increase compared to the previous year. Bananas showed a massive increase of 47% (8 495 MT) in mass traded, matched by increase of R33 million in revenue to reach R192 million in December 2022. Other vegetables traded in the system recorded a decrease of 2.13% (1 350 MT) in mass matched by an increase of 6.23% (R23 million) in revenue. The other fruits recorded a decrease of 13% (7 236 MT) to reach a total traded mass of 47 996 MT in December 2022. The revenue of these fruits grew by 1.90% (R9 million) to reach R502 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.

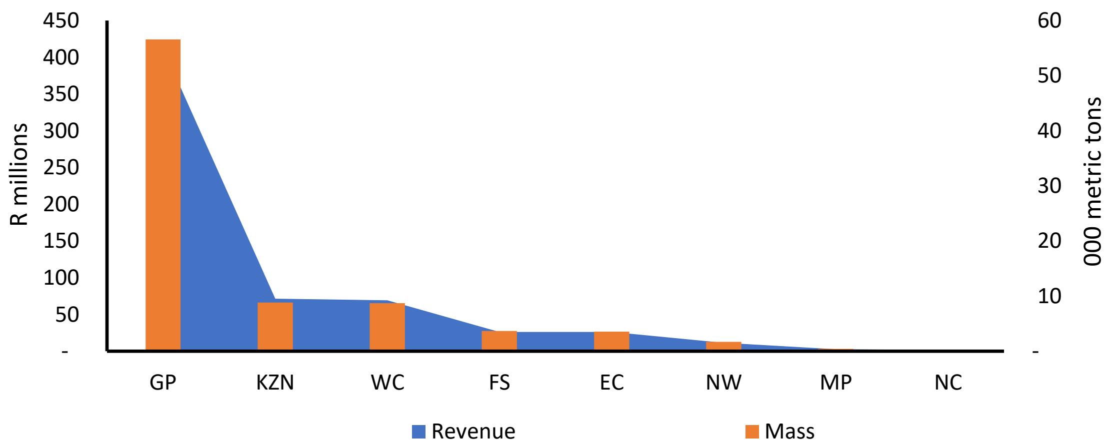


Figure 1: Summary of estimated share of smallholder farmers in different provinces by revenue and mass, Dec 2022.
Source: SAUFM (2022)

For the entire month of December 2022, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 83 595 MT and R620 million, respectively. A further analysis of this at the provincial level show that GP was leading at 56 575 MT matched by a revenue of R412 million (See Figure 1). This was followed by KZN at 8 833 MT (R71 million), WC at 8 697 MT (R69 million), FS at 3 660 MT (R26.2 million), EC at 3 530 MT (R26.1 million), NW at 1 693 MT (R11 million) and MP at 418 MT (R2.5 million). The NC had the lowest share from smallholder farmers at 190 MT (R1.3 million).

In terms of market analysis, the Johannesburg market commanded the list of the top ten fresh produce markets at 36 485 MT (R275 million) followed by Tshwane at 16 717 MT (R116 million), Cape Town at 8 697 MT (R69 million), eThekwini at 7 388 MT (R61 million), Ekurhuleni at 3 086 MT (R18 million), Buffalo City at 2 216 MT (R17 million), Mangaung at 2 226 MT (R16 million), Matlosana at 1 693 MT (R11 million), Msunduzi at 1 445 MT (R9.7 million) and Matjhabeng 1 434 MT (R9.5 million) (see table 2).

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

Market	Revenue	Mass
Johannesburg	275 419 712	36 485
Tshwane	116 255 820	16 717
Cape Town	69 309 309	8 697
eThekwini	61 713 254	7 388
Ekurhuleni	18 697 076	3 086
Buffalo City	17 453 039	2 216
Mangaung	16 722 744	2 226
Matlosana	11 215 801	1 693
Msunduzi	9 790 517	1 445
Matjhabeng	9 540 176	1 434
Gqeberha	8 734 051	1 313
Vereeniging	1 735 546	287
eMalahleni	1 626 341	319
Sol Plaatje	1 349 340	190
Mbombela	902 263	99
Kei	-	-

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 R99 million derived from 17 730 MT (see Table 3). This was followed by KZN at R16 million (2 825 MT), WC at R13 million (2 440 MT), FS at R8.3 million (1 436 MT), EC at R8.1 million (1 474 MT) and NW at R4 million (776 MT). The MP was at R1 million (187 MT) while NC at R465 216 (72 MT). The overall share in potatoes was R151 million (26 939 MT).

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

Province	Revenue	Mass
GP	R99 790 576	17 730
KZN	R16 302 599	2 825
WC	R13 141 436	2 440
FS	R8 370 014	1 436
EC	R8 131 448	1 474
NW	R4 525 045	776
MP	R1 153 605	187
NC	R465 216	72

Source: SAUFM (2022)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 10 910 MT (41%), followed by Tshwane at 5 015 MT (19%) with Cape Town (2 440 MT) and eThekwini (2 332 MT) at 9%, and Ekurhuleni at 1 607 MT (6%). Other markets in the top ten included Buffalo City (831 MT), Matlosana (776 MT), Mangaung (748 MT) and Matjhabeng (726 MT) commanding the same share at 3%. Gqeberha (605 MT) had the least share in potatoes among the top ten markets at 2%.

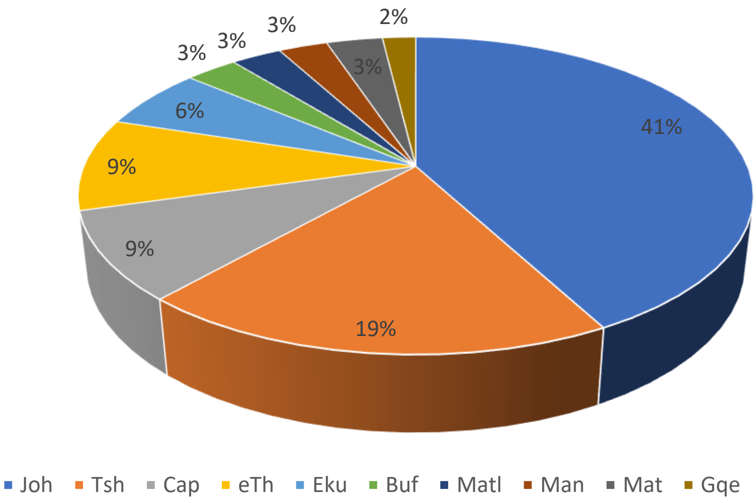


Figure 2: Estimated share in top 10 markets by mass for potatoes, December 2022

Source: SAUFM (2022)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R61 million (40%) followed by Tshwane at R29 million (19%) with eThekwini (R13.8 million) and Cape Town (R13.1 million) both at 9% while Ekurhuleni was at R8 million (5%). The Buffalo City (R5 million), Matlosana (R4.5 million) and Mangaung (R4.4 million) had the same share at 3% while Matjhabeng (R3.9 million) was at 2%. Gqeberha (R3.0 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

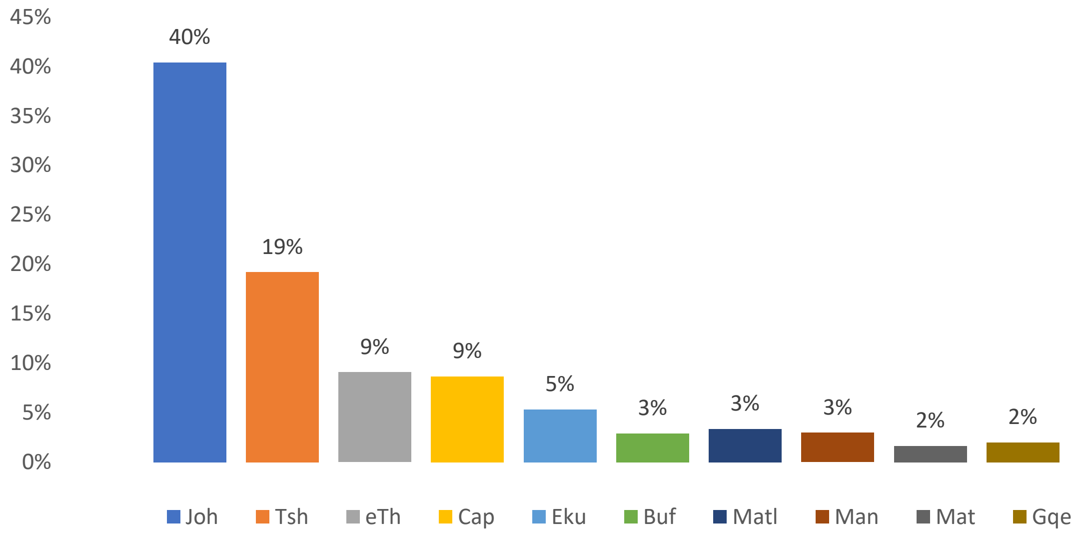


Figure 3: Estimated shares in revenue by top 10 markets for potatoes, Dec 2022

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 R59 million in revenue, derived from 6 998 MT in mass, followed by KZN at R10 million (1 260 MT), WC at R5 million (603 MT), EC at R3 million (356 MT), FS at R2 million (252 MT), NW at R868 060 (100 MT) and MP at R613 501 (66 MT).

The NC at R121 790 (14 MT) had the lowest share of smallholder farmers in onions. The overall share was R82 million and 9 649 MT.

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

Province	Revenue	Mass
GP	R59 149 080	6 998
KZN	R10 879 650	1 260
WC	R5 771 082	603
EC	R3 304 984	356
FS	R2 147 500	252
NW	R868 060	100
MP	R613 501	66
NC	R121 790	14

Source: SAUFM (2022)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in December 2022. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 4 997 MT (52%). It was followed by Tshwane at 1 742 MT (18%), eThekwini at 1 106 MT (11%), Cape Town at 603 MT (6%), and Buffalo City at 264 MT (3% MT). Other markets included Buffalo City (264 MT), Ekurhuleni (240 MT), Mangaung (162 MT) and Msunduzi (155 MT) had the same share at 2%, while

Matlosana (100 MT) was at 1%. Gqeberha (92 MT) had the least share of smallholder farmers in onions among the top ten markets at 1%.

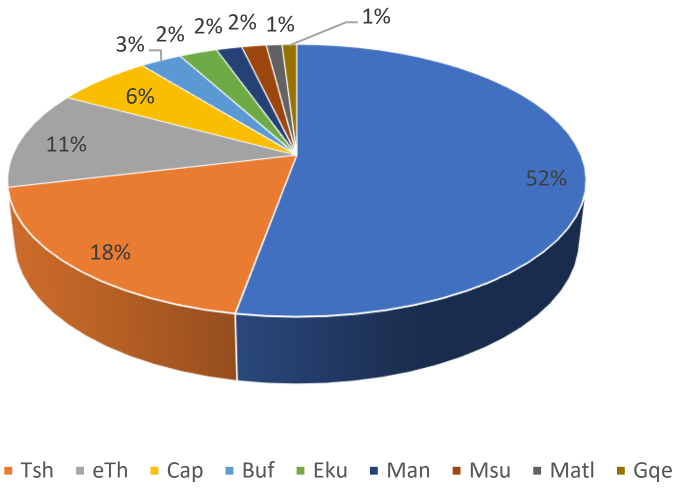


Figure 4: Estimated shares in top 10 markets by mass for onions, Dec 2022

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 52% (R43 million), followed by Tshwane at 17% (R13 million), eThekwini at 12% (R9 million), Cape Town at 7% (R5 million), Buffalo City at 3% (R2 million) with Ekurhuleni (R1.9 million) and Mangaung (R1.3 million) both at 2%. The Msunduzi (R1 million) Gqeberha (R925 677) also had the same share at 1%. Matlosana (R868 059) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

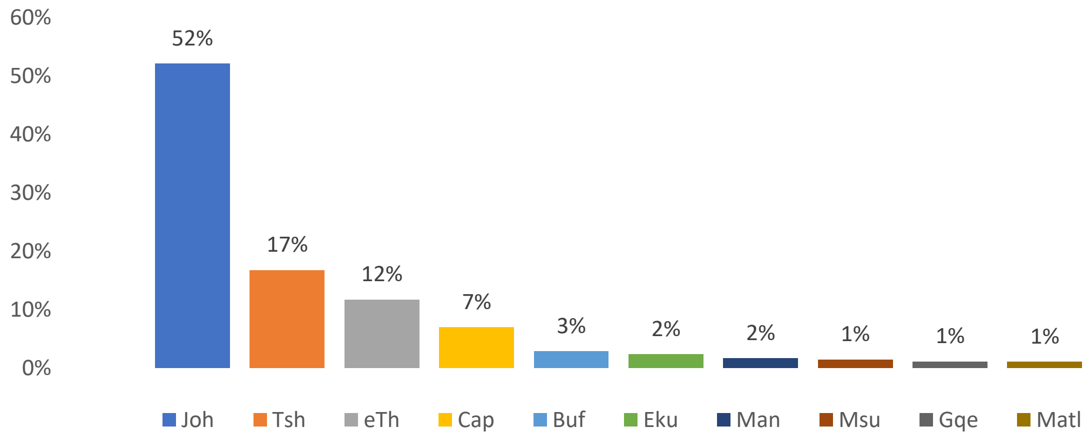


Figure 5: Estimated shares in revenue by top 10 markets for onions, Dec 2022

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 4 109 MT, followed by WC at R8 million (861 MT), KZN at R5 million (539 MT), FS at R3 million (272 MT), EC at R1.8 million (224 MT), NW at R1.3 million (115 MT) and NC at R414 316 (43 MT). The MP province was at R68 781 (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 R58 million and 6 176 MT.

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

Province	Revenue	Mass
GP	R37 787 151	4 109
WC	R8 231 980	861
KZN	R5 292 779	539
FS	R3 127 739	272
EC	R1 851 614	224
NW	R1 314 039	115
NC	R414 316	43
MP	R68 781	13

Source: SAUFM (2022)

Tomatoes were the fourth largest traded commodity in terms of mass at fresh produce markets in December 2022. The Johannesburg Market commanded the largest share of smallholder farmers at 49%, translated as 3 019 MT (see Figure 6). This market was followed by Tshwane at 889 MT (14%), Cape Town at 861 MT (14%), eThekwini at 491 MT (8%) with Ekurhuleni (201 MT) and Mangaung (162 MT) at 3%. Other markets among the top ten included Buffalo City (119 MT), Matlosana (115 MT) and Matjhabeng (110 MT) with the same share at 2%. Gqeberha (106 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 2%.

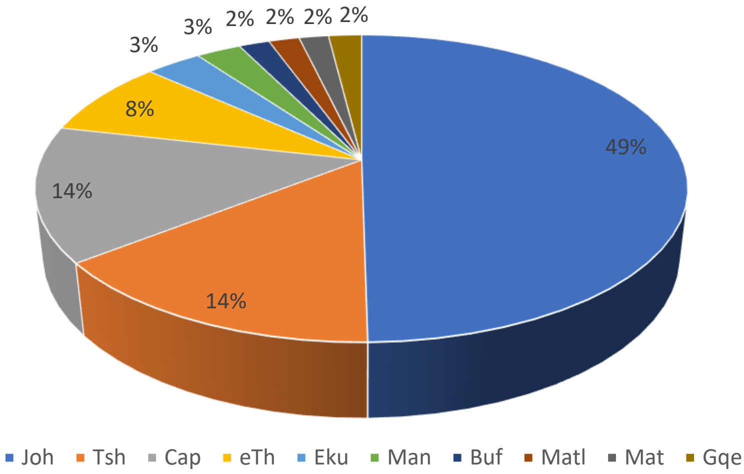


Figure 6: Estimated share in top 10 markets by mass for tomatoes, Dec 2022

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% (R27 million), Tshwane at 15% (R8.6 million), Cape Town at 14% (R8.2 million), eThekwini at 8% (R4 million) with Ekurhuleni (R1.7 million) and Mangaung (R1.5 million) at 3%. The Matjhabeng (R1.34 million), Matlosana (R1.31 million), and Gqeberha (R976 218) had the same share at 2%. Buffalo City (R875 394) had the lowest share of smallholder farmers in tomatoes among the top ten markets at 1%.

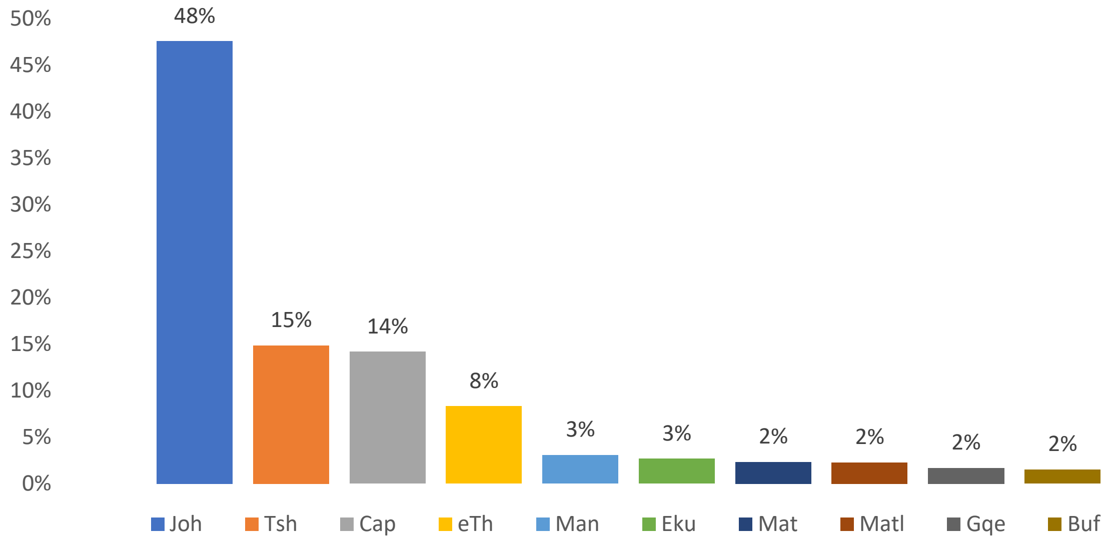


Figure 7: Estimated share in revenue by top 10 markets for tomatoes, Dec 2022

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 R31 million derived from a total mass of 4 562 MT, followed by WC at R8 million (1 168 MT), KZN at R7 million (947 MT), EC at R4 million (551 MT), FS at R3 million (413 MT) and NW at R1 million (179 MT).

The share of smallholder farmers in bananas in MP was estimated at R266 630 (40 MT) while NC had the lowest estimated share of smallholder farmers in bananas at R1 136 over the reported month. The estimated overall smallholder share for bananas was R57 million and 7 860 MT.

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

Province	Revenue	Mass
GP	R31 828 604	4 562
WC	R8 544 265	1 168
KZN	R7 959 146	947
EC	R4 745 187	551
FS	R3 264 854	413
NW	R1 233 418	179
MP	R266 630	40
NC	R1 136	0

Source: SAUFM (2022)

Bananas constituted the most traded fruit on the fresh produce market system in December 2022. The Johannesburg market commanded the largest share of smallholder farmers at 32% (2 552 MT) (see Figure 8). It was followed by Tshwane at 22% (1 715 MT), Cape Town at 12% (947 MT), eThekwini at 11% (902 MT), Buffalo City at 5% (356 MT) and Mangaung at 4% (296 MT), while Msunduzi (267 MT) and Ekurhuleni (265 MT) were both at 3%. The Gqeberha (195

MT) stood at 2%. Among the top ten markets Matlosana fresh produce market (179 MT) commanded the least estimated share of smallholder farmers at 2%.

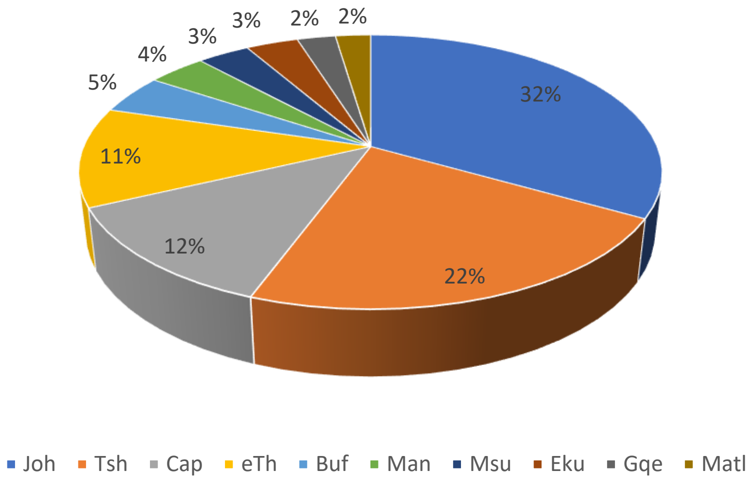


Figure 8: Estimated shares in top 10 markets by mass for bananas, Dec 2022

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 20% (R11 million), Cape Town at 15% (R8 million), eThekwini at 11% (R6 million), Buffalo City at 5% (R3 million) and Mangaung at 4% (R2 million). Other markets that include Ekurhuleni (R1.7 million), Msunduzi (R1.7 million) and Gqeberha (R1.6 million) were at 3%. The Matlosana (R1.2 million) fresh produce markets had the least share at 2%.

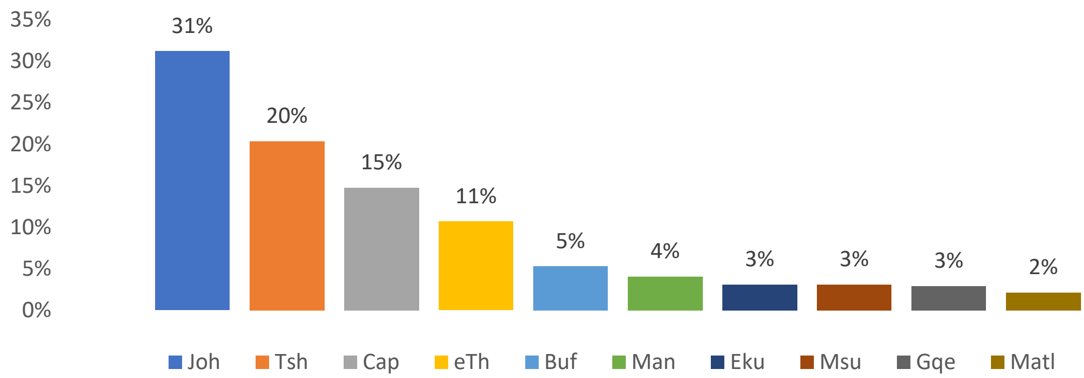


Figure 9: Estimated shares revenue by in top 10 markets for bananas, Dec 2022

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 13 966 MT. This market was followed by WC R13 million (1 475 MT), KZN at R11 million (1 451 MT), FS at R4 million (688 MT), EC at R3 million (563 MT), and NW at R1 million (334 MT).

The MP had an estimated share of other vegetables at R191 254 (59 MT) while NC stood at R174 070 (37 MT). The overall share of smallholder farmers in other vegetables in December 2022 was R119 million and 18 573 MT.

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

Province	Revenue	Mass
GP	R85 102 359	13 966
WC	R13 080 283	1 475
KZN	R11 277 885	1 451
EC	R3 598 225	563
FS	R4 255 243	688
NW	R1 415 462	334
MP	R191 254	59
NC	R174 070	37

Source: SAUFM (2022)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in December 2022 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 50% (9 247 MT) (see Figure 10), followed by Tshwane at 23% (4 278 MT), Cape Town at 8% (1 475 MT), eThekwini at 7% (1 249 MT), Mangaung at 3% (467 MT) while Ekurhuleni (419 MT), Buffalo City (355 MT) and Matlosana (334 MT) commanded the same share at 2%. The Matjhabeng was at 1% (221 MT). The Gqeberha commanded the lowest share of smallholder farmers among the top ten markets also at 1% (208 MT).

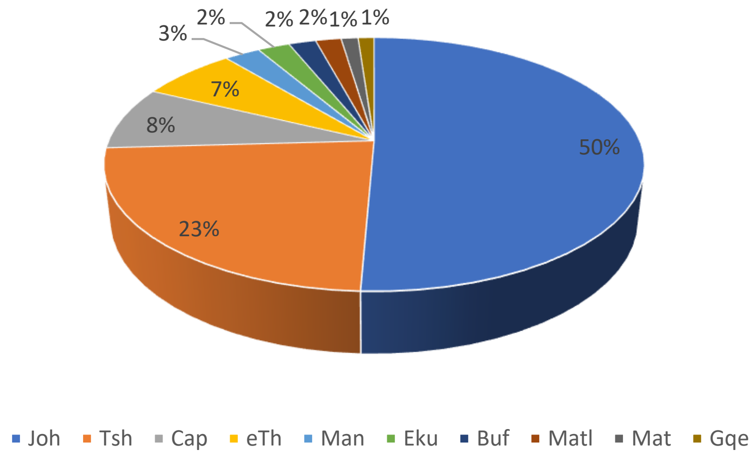


Figure 10: Estimated shares in top 10 markets by mass for other vegetables, Dec 2022

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 51% (R60 million), Tshwane at 19% (R22 million), Cape Town 11% (R13 million), eThekwini at 8% (R10 million) with Buffalo City (R2.8 million), Mangaung (R2.5 million) and Ekurhuleni (R1.8 million) commanding the same share at 2%. Other markets with the same share of 1% include Gqeberha (R1.42 million) and Matlosana (R1.41 million). The Msunduzi (R1.1 million) had the least share of revenue for smallholder farmers among the top ten markets at 1%.

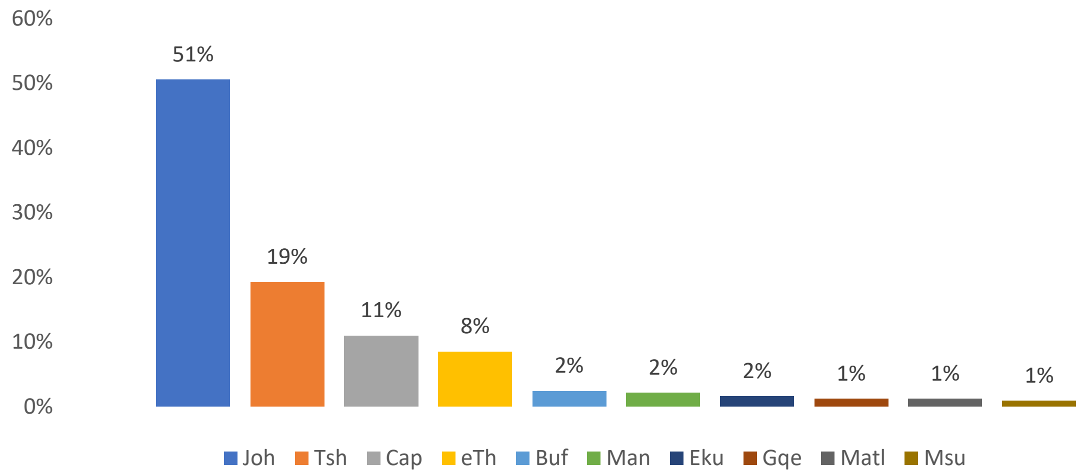


Figure 11: Estimated shares in revenue by markets for other vegetables, Dec 2022

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 December 2022. The GP province was leading with a revenue of R98 million derived from a total mass of 10 152 MT, followed WC at R20 million (2 372 MT), KZN at R19 million (1 589 MT), FS at R5 million (561 MT), EC at R3 million (398 MT), and NW at R1 million (190 MT).

The NC province had R191 254 (24 MT) while MP commanded the lowest estimated share of smallholder farmers in other fruits R174 070 (54 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R150 million matched by 14 399 MT.

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

Province	Revenue	Mass
GP	R98 450 384	9 210
WC	R20 540 264	2 372
KZN	R19 791 711	1 589
FS	R5 754 587	561
EC	R3 898 615	398
NW	R1 859 777	190
NC	R191 254	24
MP	R174 070	54

Source: SAUFM (2022)

Market shares for other fruits traded in the various fresh produce markets in December 2022 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 40% (5 759 MT) (see Figure 12), followed by Tshwane at 21% (3 078 MT), Cape Town at 16% (2 372 MT), eThekwini at 9% (1 310 MT) and Mangaung (391 MT) at 3%. The Ekurhuleni (356 MT), Buffalo City (291 MT) and Msunduzi (280 MT) had the same share at 2% with Matlosana (190 MT) at 1%. Matjhabeng fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 1% (170 MT).

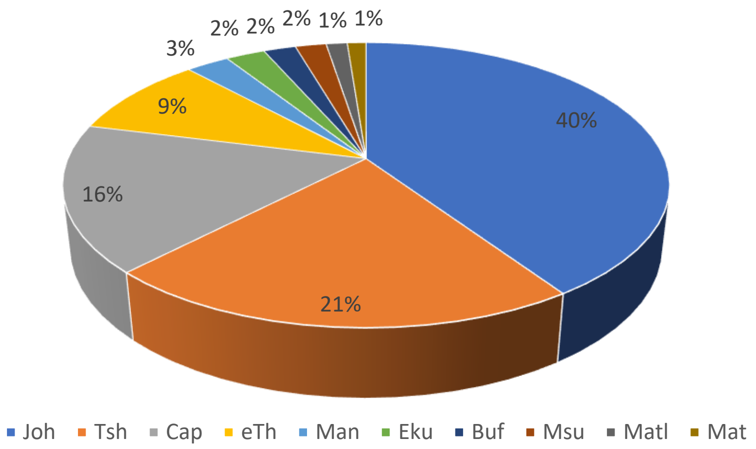


Figure 12: Estimated shares in top 10 markets by mass for other fruits, Dec 2022

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 43% (R65 million), Tshwane at 20% (R29 million), Cape Town at 14% (R20 million), eThekwini at 11% (R17 million), and Mangaung at 3% (R3.4 million). The Ekurhuleni (R3.2 million), Buffalo City (R2 million) and Msunduzi (R1.8 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% (R672 147 million).

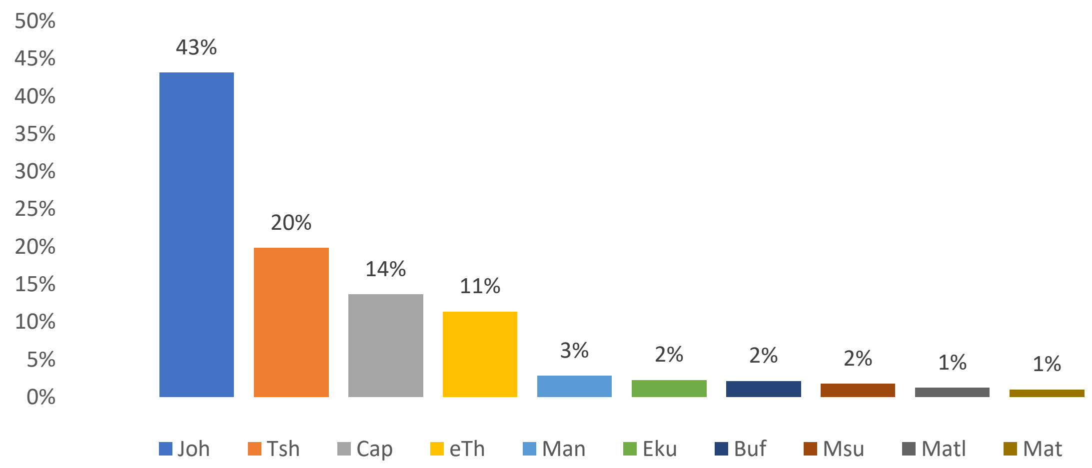
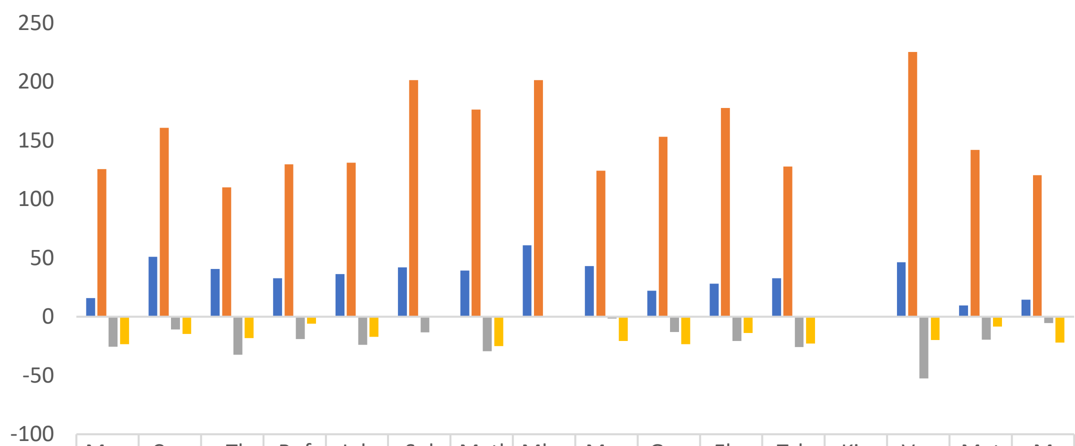


Figure 13: Estimated shares in revenue by top 10 markets for other fruits, Dec 2022

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 December 2021 and 2022. The average price change for potatoes was 35% ranging from 0% in Kie to 61% in Mbombela. This was followed by onions with an average price change of 132% over the reported period, ranging from 13% in Kie to 225% in Vereeniging. Tomatoes had an average price change at -22% with the lowest change at -52% in Vereeniging and maximum at 0% in Kie and Mbombela. Finally, bananas had an average price change of -18%, ranging from -25% in Matlosana Msunduzi to 0% in Sol Plaatjie. Overall, all the markets exhibit positive price changes for onions and potatoes and negative trend for bananas and tomatoes.



	Man	Cap	eTh	Buf	Joh	Sol	Matl	Mbo	Msu	Gqe	Eku	Tsh	Kie	Ver	Mat	eMa
Potatoes	16	51	41	33	36	42	39	61	43	22	28	33	0	46	10	15
Onions	125	161	110	130	131	201	176	201	124	153	178	128	0	225	142	120
Tomatoes	-25	-11	-32	-19	-24	-13	-29	0	-2	-13	-21	-26	0	-52	-20	-5
Bananas	-23	-15	-18	-6	-17	0	-25	0	-21	-23	-14	-23	0	-20	-8	-22

Figure 14: Price trends for top four traded agricultural products in Dec 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 December 2022 the total mass traded from the NFPMs was 278 650 MT, generating a total revenue of R2.06 billion. Thirty percent (smallholder share) of this was estimated at 83 595 MT matched by R620 million in revenue. GP was leading at 56 575 MT matched by a revenue of R412 million. This was followed by KZN at 8 833 MT (R71 million), WC at 8 697 MT (R69 million), FS at 3 660 MT (R26.2 million), EC at 3 530 MT (R26.1 million), NW at 1 693 MT (R11 million) and MP at 418 MT (R2.5 million). The NC had the lowest share from smallholder farmers at 190 MT (R1.3 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 36 485 MT (R275 million) followed by Tshwane at 16 717 MT (R116 million), Cape Town at 8 697 MT (R69 million), eThekwini at 7 388 MT (R61 million), Ekurhuleni at 3 086 MT (R18 million), Buffalo City at 2 216 MT (R17 million), Mangaung at 2 226 MT (R16 million), Matlosana at 1 693 MT (R11 million), Msunduzi at 1 445 MT (R9.7 million) and Matjhabeng 1 434 MT (R9.5 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. Overall, all the markets exhibit positive price changes for onions and potatoes and negative trend for bananas and tomatoes.

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