NAMC

Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

FEBRUARY 2023

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 National Fresh Produce Markets (NFPM) in South Africa during February 2023. 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 South African Union of Food Markets (SAUFM).

2. OVERVIEW OF THE MONTH – FEB 23

In February 2023 the total mass traded at the NFPMs was 225 579 MT, generating a total revenue of R1.84 billion (see Table 1). This indicates 8% (20 643 MT) decline in volume trade and 23% (R343 830 259 million) increase in revenue compared to the same month during the previous year. This finding is an indication 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 Feb 2023

Commodity	Revenue	Mass
Total	R1 841 314 522	225 579
Potatoes	R451 660 809	69 594
Onions	R175 682 155	28 505
Tomatoes	R199 482 845	15 010
Bananas	R196 786 620	24 180
Other vegetables	R348 651 227	45 349
Other fruits	R469 050 865	42 941

Source: SAUFM (2023)

Potatoes had a total mass of 69 594 MT, indicating a decrease of 22% compared to the same month in the previous year. The revenue increased by 45% during the same period to reach R451 million. The total mass for onions decreased by 11% (3 382 MT) to reach 28 505 MT in Feb 2023 while the revenue grew by 52% (R60 million) to reach R175 million. Tomatoes had a total mass of 15 010 MT, indicating a decrease of 5 % (translated as 811 MT). This traded mass was matched by total revenue of R199 million, indicating 18% increase compared to the previous year. Bananas showed an increase of 12% (2 508 MT) in mass traded, matched by an increase of R37 million to reach R196 million in revenue in Feb 2023. Other vegetables traded in the system recorded a decrease of 9% (4 215 MT) in mass matched by an increase of 21% (R59 million) in revenue. The other fruits recorded an decrease of 4% (1 804 MT) to reach a total traded mass of 42 941 MT in February 2023. The revenue of these fruits grew by 11% (R51 million) to reach R520 million over the reported period.

3. ESTIMATED SHARE OF SMALLHOLDER FARMERS

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 NFPM system in South Africa.

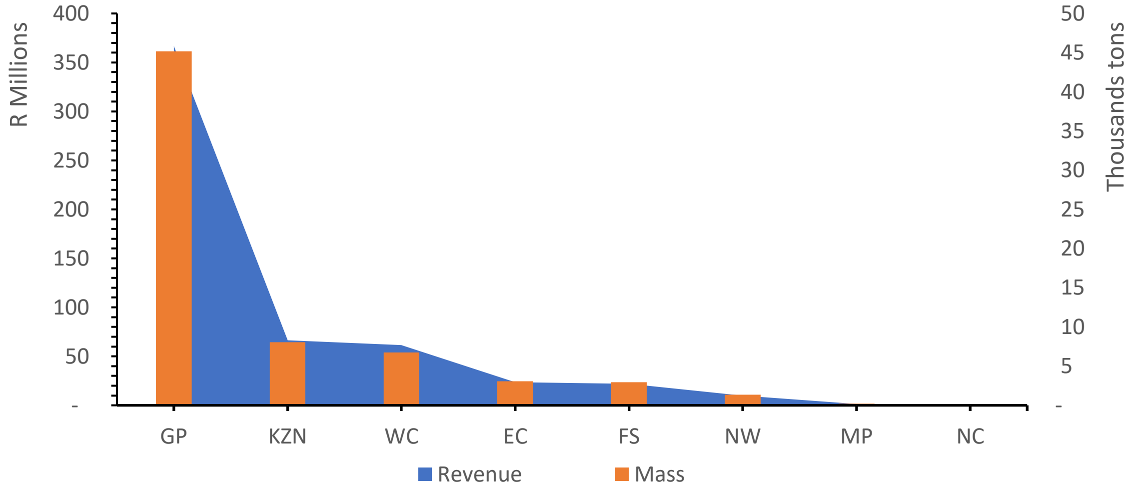


Figure 1: **Summary of estimated share of smallholder farmers in different provinces by revenue and mass in Feb 2023.**
Source: SAUFM (2023)

For the entire month of February 2023, the ideal share (30%) of smallholder farmer in terms of mass and revenue was estimated at 67 674 MT and R552 million, respectively. A further analysis of this at the provincial level shows that GP was leading at 45 178 MT matched by a revenue of R366 million (See Figure 1). This was followed by KZN at 8 053 MT (R66 million), WC at 6 739 MT (R66 million), EC at 3 088 MT (R23 million), FS at 2 927 MT (R21 million), NW at 1 360 MT (R9 million) and MP at 197 MT (R1 million). The NC had the lowest share at 131 MT (R931 568 million).

In terms of market analysis, the Johannesburg market commanded the list of the top ten fresh produce markets at 29 238 MT (R244 million), followed by Tshwane at 13 349 MT (R104 million), Cape Town at 6 739 MT (R66 million), eThekwini at 6 715 MT (R61 million), Ekurhuleni at 2 364 MT (R16 million), Buffalo City at 1 841 MT (R14 million), Mangaung at 1 818 MT (R14 million), Matlosana at 1 360 MT (R9 million), Msunduzi at 1 338 MT (R9 million) and Gqeberha at 1 235 MT (R8 million) (see Table 2).

Table 2: Estimated share of smallholder farmers by market measured in revenue and mass in Feb 2023

Market	Revenue	Mass
Johannesburg	244 692 089	29 238
Tshwane	104 238 547	13 349
Cape Town	61 577 669	6 739
eThekwini	57 310 205	6 715
Ekurhuleni	16 386 483	2 364
Buffalo City	14 825 159	1 841
Mangaung	14 336 031	1 818
Matlosana	9 842 611	1 360
Msunduzi	9 169 207	1 338
Gqeberha	8 780 088	1 235
Matjhabeng	7 548 305	1 110
Vereeniging	1 459 283	227
eMalahleni	1 206 987	188
Sol Plaatje	931 568	131
Mbombela	57 772	9
Kei	32 354	12

Source: SAUFM (2023)

3.1 POTATOES

Potatoes remain the largest traded agricultural product in the FPM system in South Africa. The highest estimated market share of smallholder farmers in potatoes was observed in GP at R86 million derived from 13 441 MT (see Table 3). This was followed by WC at R15 million (2 484 MT), KZN at R13 million (1 845 MT), EC at R8 million (1 121 MT), FS at R6 million (1 246 MT) and NW at R3 million (585 MT). The NC was at R575 839 (98 MT) while NC at R389 297 (58 MT). The overall share in potatoes was R135 498 243 million (20 878 MT).

Table 3: Summary of estimated share of smallholder farmers in potatoes by province in Feb 2023

Province	Revenue	Mass
GP	R86 507 242	13 441
WC	R15 837 042	2 484
KZN	R13 606 224	1 845
EC	R8 112 057	1 121
FS	R6 973 797	1 246
NW	R3 496 745	585
NC	R575 839	98
MP	R389 297	58

Source: SAUFM (2023)

Figure 2 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 8 317 MT (40%), followed by Tshwane at 3 869 MT (19%), with eThekwini at 2 025 MT (10%), Cape Town at 1 845 MT (9%) and Ekurhuleni at 1 105 MT (5%). Other markets in the top ten included Buffalo City (644 MT), Mangaung (601 MT), Gqeberha (594 MT) and Matlosana (585 MT) commanding the same share at 3%. The Matjhabeng (521 MT) had the least share in potatoes among the top ten markets at 2%.

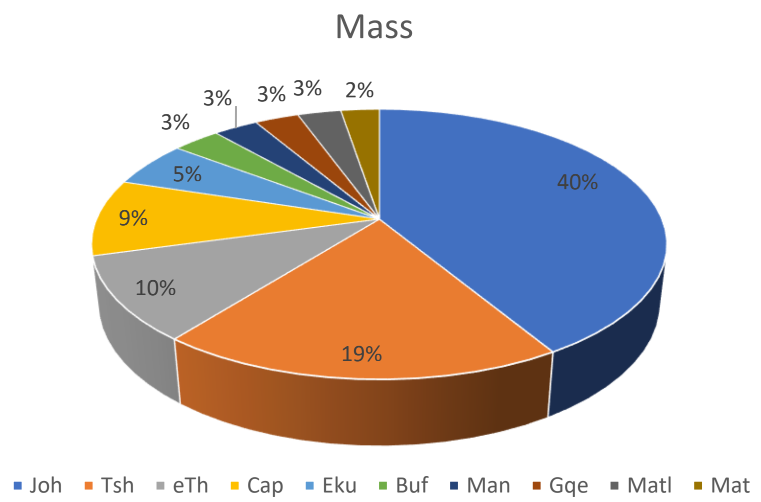


Figure 2: Estimated share of smallholder farmers by mas in the top 10 markets for potatoes in Feb 2023

Source: SAUFM (2023)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 3. The Johannesburg led at R54 million (40%), followed by Tshwane at R24 million (18%), Cape Town at R13.6 million (10%), eThekwini at R13 million (10%), and Ekurhuleni at R6 million (5%). The Buffalo City (R4 million), Gqeberha (R3.9 million), Mangaung (R3.8 million), and Matlosana (R3.4 million) had the same share at 3%. Matjhabeng (R3.1 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

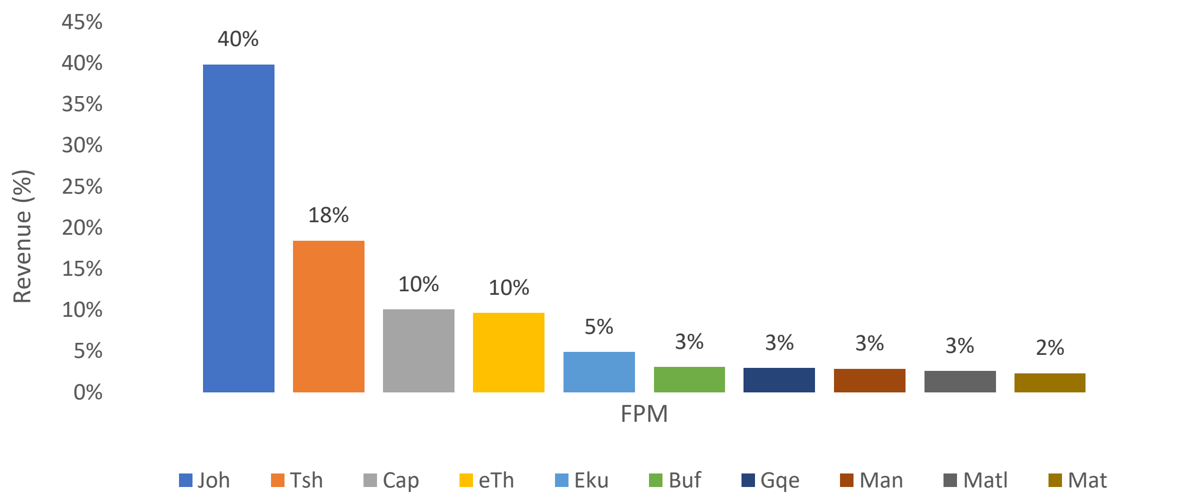


Figure 3: Estimated shares of smallholder farmers by revenue in the top 10 markets for potatoes in Feb 2023

Source: SAUFM (2023)

3.2 ONIONS

Table 4 presents the estimated share of smallholder farmers in onions for eight provinces. The GP was the leading province with R35 million in revenue, derived from 6 139 MT in mass, followed by KZN at R8 million (1 136 MT), WC at R3 million (582 MT), FS at R2 million (351 MT), EC at R1 million (216 MT), NW at R567 473 (95 MT) and MP at R105 662 (25 MT).

The NC at R47 842 (9 MT) had the lowest share of smallholder farmers in onions. The overall share was R52 million and 8 552 MT.

Table 4: Summary of estimated share of smallholder farmers in onions by province in Feb 2023

Province	Revenue	Mass
GP	R35 941 310	6 139
KZN	R8 085 502	1 136
WC	R3 990 626	582
FS	R2 425 403	351
EC	R1 540 829	216
NW	R567 473	95
NC	R105 662	25
MP	R47 842	9

Source: SAUFM (2023)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in February 2023. The results presented in Figure 4 show that the Johannesburg market commanded the largest share of smallholder farmers at 4 437 MT (52%). It was followed by Tshwane at 1 500 MT (18%), eThekwini at 996 MT (12%), Cape Town at 582 MT (7%), and Buffalo City at 205 MT (2% MT). Other markets including Ekurhuleni (190 MT), Gqeberha (146 MT) and Msunduzi (141 MT) had the same share at 2%, while Mangaung (128 MT) was at 1%.

Matlosana had the least share of smallholder farmers in onions among the top ten markets at 1% (95 MT).

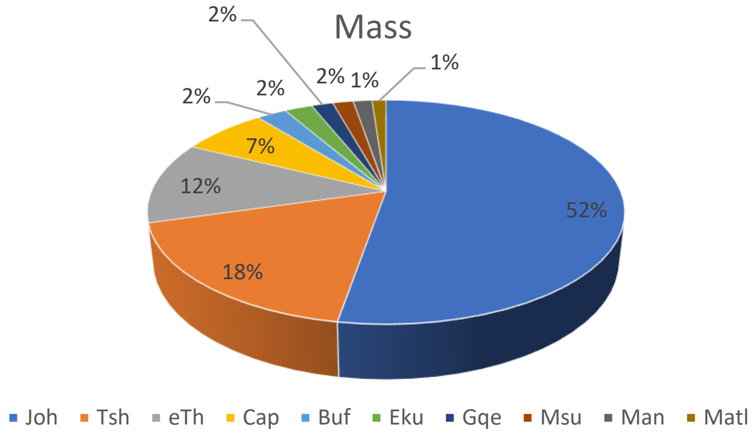


Figure 4: Estimated shares of smallholder farmers by mass in the top 10 markets for onions in Feb 2023

Source: SAUFM (2023)

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% (R26 million), followed by Tshwane at 17% (R8 million), eThekwini at 14% (R7 million), Cape Town at 8% (R3 million), Buffalo City at 3% (R1.4 million) with Ekurhuleni (R1 million), Gqeberha (R999 096), Mangaung (R960 118) and Msunduzi (R938 875) at 2%. The Matjhabeng (R580 710) had the lowest share of smallholder farmers in onions at 1% among the top ten markets.

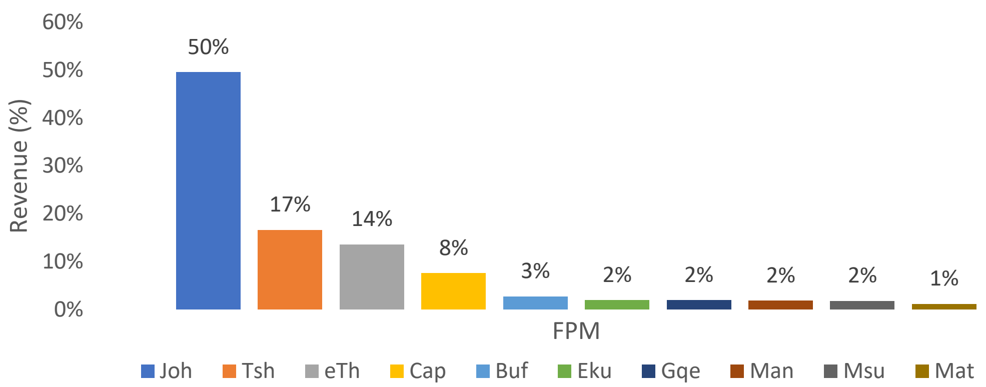


Figure 5: Estimated shares of smallholder farmers by revenue in the top 10 markets for onions in Feb 2023

Source: SAUFM (2023)

3.3 TOMATOES

Table 5 presents the estimated share of smallholder farmers in tomatoes for eight provinces of South Africa. The GP was the leading province at R41 million in revenue derived from a total mass of 3 059 MT, followed by KZN at R7 million (636 MT), WC at R5 million (418 MT), FS at R2 million (171 MT), EC at R1.7 million (143 MT), NW at R1 million (61 MT) and NC at R141 937 (10 MT). The MP province was at R60 667 (6 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 R59 million in revenue derived from total mass of 4 503 MT.

Table 5: Summary of estimated share of smallholder farmers in tomatoes by province in Feb 2023

Province	Revenue	Mass
GP	R41 124 167	3 059
KZN	R7 946 507	636
WC	R5 370 919	418
FS	R2 430 885	171
EC	R1 762 602	143
NW	R1 007 171	61
NC	R141 937	10
MP	R60 667	6

Source: SAUFM (2023)

Tomatoes were the fourth largest traded commodity at NFPM in February 2023. The Johannesburg Market commanded the largest share of smallholder farmers at 47%, translated as 2 122 MT (see Figure 6). This market was followed by Tshwane at 808 MT (18%), Cape Town at 381 MT (14%), eThekwini at 127 MT (8%), Ekurhuleni at 110 MT (3%) with Mangaung (74 MT), Buffalo City (69 MT) and Gqeberha (61 MT) at 3% while Matlosana (61

MT) stood at 1%. Matjhabeng (36 MT) had the least share of smallholder farmers in tomatoes among the top ten markets at 1%.

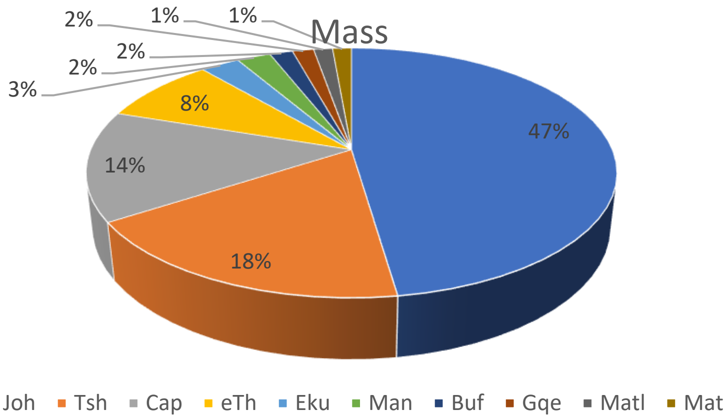


Figure 6: Estimated share of smallholder farmers by mass in the top 10 markets for tomatoes in Feb 2023

Source: SAUFM (2023)

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% (R28 million), Tshwane at 18% (R10 million), Cape Town at 13% (R7 million), eThekwini at 8% (R5 million) with Ekurhuleni (R1.50 million) and Mangaung (R1.50 million) both at 3%. The Matlosana (R1 million), Buffalo City (R942 708) and Matjhabeng (R923 178) had the same share at 2%. Gqeberha (R819 893) had the lowest share of smallholder farmers in tomatoes among the top ten markets at 1%.

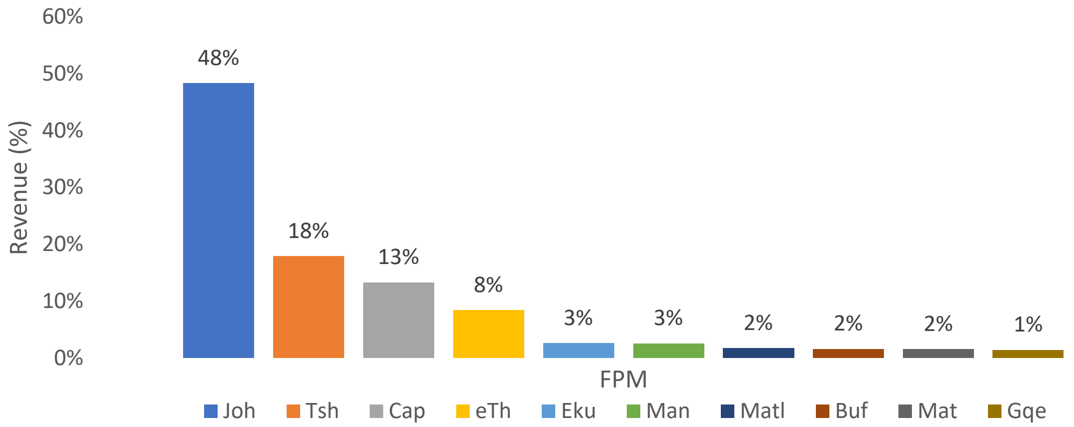


Figure 7: Estimated share of smallholder farmers by revenue in the top 10 markets for tomatoes in Feb 2023

Source: SAUFM (2023)

3.4 BANANAS

Table 6 presents the estimated share of smallholder farmers in bananas for eight provinces of South Africa. The GP was the leading province at R32 million derived from a total mass of 4 027 MT, followed by KZN at R9 million (1 190 MT), WC at R8 million (929 MT), FS at R4 million (547 MT), EC at R2 million (371 MT) and NW at R1 million (157 MT).

The share of smallholder farmers in bananas in NC was estimated at R274 275 (34 MT) while NC had the lowest estimated share of smallholder farmers in bananas at R3 097 (0.30 MT) over the reported month. The estimated overall smallholder share for bananas was R59 million and 7 254 MT.

Table 6: Summary of estimated share of smallholder farmers in bananas by province in Feb 2023

Province	Revenue	Mass
GP	R32 433 552	4 027
KZN	R9 126 072	1 190
WC	R8 236 376	929
FS	R4 665 654	547
EC	R2 984 341	371
NW	R1 312 619	157
NC	R274 275	34
MP	R3 097	0.30

Source: SAUFM (2023)

Bananas constituted the most traded fruit on the fresh produce market system in February 2023. The Johannesburg market commanded the largest share of smallholder farmers at 31% (2 266 MT) (see Figure 8). It was followed by Tshwane at 20% (1 463 MT), Cape Town at 13% (929 MT), eThekwini at 12% (877 MT) with Buffalo City at 12% (366 MT). The Msunduzi (314 MT), Mangaung (269 MT) and Ekurhuleni (257 MT) were at 4% while Gqeberha (181 MT) was at 2%. Among the top ten markets, Matlosana fresh produce market (157 MT) commanded the least estimated share of smallholder farmers at 2%.

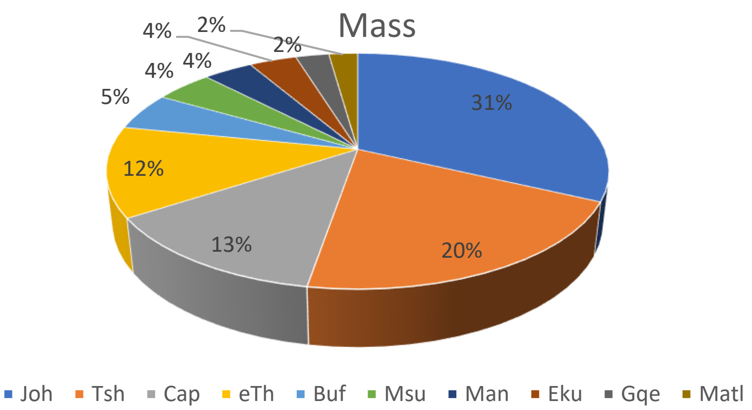


Figure 8: **Estimated shares of smallholder farmers by mass in top 10 markets for bananas in Feb 2023**

Source: SAUFM (2023)

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% (R9 million), eThekwini at 11% (R6 million), Buffalo City at 5% (R2.9 million) and Mangaung at 4% (R2.2 million). Other markets including Ekurhuleni (R1.9 million), Msunduzi (R1.8 million) and Gqeberha (R1.7 million) were at 3%. The Matlosana (R1.3 million) fresh produce market had the least share at 2%.

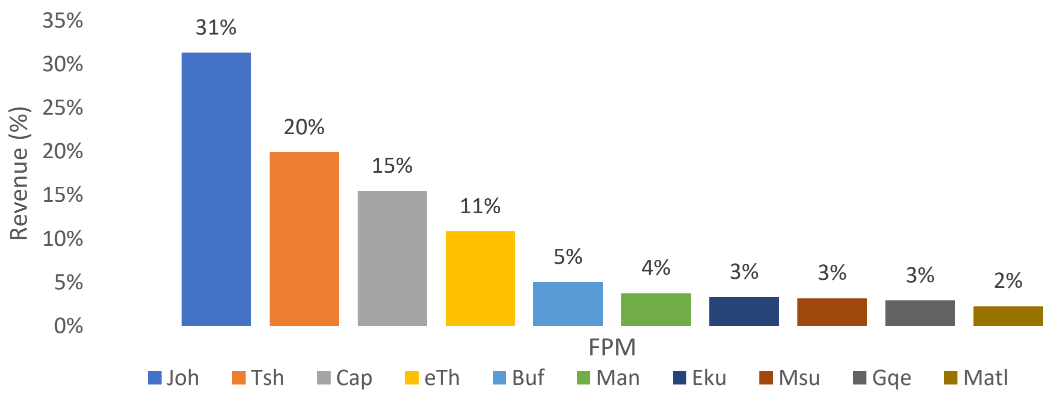


Figure 9: **Estimated shares of smallholder farmers by revenue in the top 10 markets for bananas in Feb 2023**

Source: SAUFM (2023)

3.5 OTHER VEGETABLES

Table 7 presents the estimated share of smallholder farmers in other vegetables for eight provinces in South Africa. The GP was the leading province with revenue of R75 million derived from a total mass of 10 006 MT. This was followed by KZN at R12 million (1 370 MT), WC at R8 million (975 MT), EC at R2.8 million (526 MT), FS at R2.7 million (419 MT), and NW at R1 million (248 MT).

The NC had an estimated share of R180 368 (26 MT) while MP stood at R108 814 (35 MT). The overall share of smallholder farmers in other vegetables in February 2023 in value and mass was R104 million and 13 605 MT, respectively.

Table 7: Summary of estimated share of smallholder farmers in other vegetables by province in Feb 2023

Province	Revenue	Mass
GP	R75 712 708	10 006
KZN	R12 588 706	1 370
WC	R8 938 801	975
FS	R2 741 827	419
EC	R2 837 893	526
NW	R1 466 904	248
NC	R180 368	26
MP	R108 814	35

Source: SAUFM (2023)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in February 2023 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 49% (6 632 MT) (see Figure 10), followed by Tshwane at 23% (3 065 MT), Cape Town at 10% (1 370 MT), eThekwini at 7% (912 MT), Mangaung at 3% (363 MT). The Ekurhuleni (302 MT), Matlosana (248 MT) and Buffalo City (236 MT) commanded the same share at 2% while Gqeberha (180 MT) was at 1%. The Matjhabeng market commanded the lowest share of smallholder farmers among the top ten markets also at 1% (162 MT).

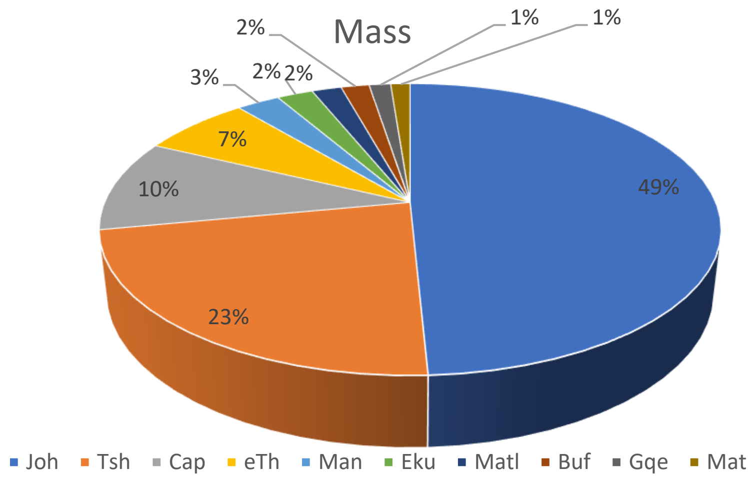


Figure 10: **Estimated shares of smallholder farmers by mass in the top 10 markets for other vegetables in Feb 2023**

Source: SAUFM (2023)

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% (R53 million), Tshwane at 20% (R20 million), Cape Town at 12% (R12 million), eThekwini at 8% (R8 million). The Mangaung (R2 million), Buffalo City (R1.8 million) and Ekurhuleni (R1.6 million) commanding the same share at 2%. Other markets with the same share of 1% include Matlosana (R1.4 million) and Gqeberha (R986 489). The Matjhabeng (R685 028) had the least share of revenue for smallholder farmers among the top ten markets at 1%.

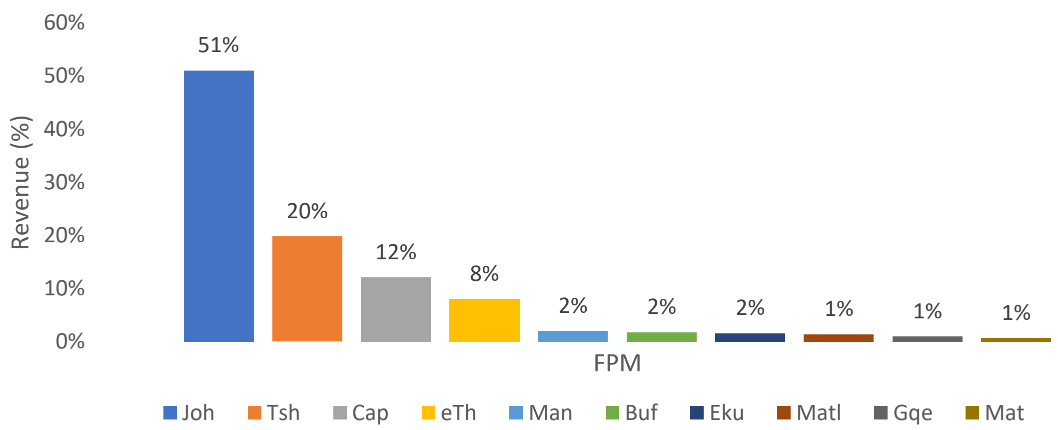


Figure 11: **Estimated shares of smallholder farmers by revenue in the top 10 markets for other vegetables in Feb 2023**

Source: SAUFM (2023)

3.6 OTHER FRUITS

Table 8 presents the estimated share of smallholder farmers in other fruits for eight provinces in South Africa during February 2023. The GP province was leading with a revenue of R95 million derived from a total mass of 8 507 MT, followed KZN at R20 million (1 850 MT), WC at R14 million (1 378 MT), FS at R5 million (523 MT), EC at R3 million (382 MT), and NW at R1 million (214 MT).

The NC province was at R180 368 (19 MT) while MP commanded the lowest estimated share of smallholder farmers in other fruits at R108 814 (9 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R140 million matched by 12 882 MT.

Table 8: Summary of estimated share of smallholder farmers in other fruits by province in Feb 2023

Province	Revenue	Mass
GP	R95 057 423	8 507
KZN	R20 010 773	1 850
WC	R14 319 534	1 378
FS	R5 212 657	523
EC	R3 833 991	382
NW	R1 991 699	214
NC	R180 368	19
MP	R108 814	9

Source: SAUFM (2023)

Market shares for other fruits traded in the various fresh produce markets in February 2023 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 42% (5 464 MT) (see Figure 12), followed by Tshwane at 21% (2 644 MT), eThekwini at 11% (1 524 MT), Cape Town at 12% (1 378 MT) with Ekurhuleni (382 MT) Mangaung (347 MT) and Msunduzi (326 MT) at 3%. The Buffalo City (317 MT) and Matlosana

(214 MT) had the same share at 2%. Matjhabeng fresh produce market commanded the least share of smallholder farmers among the top ten fresh produce markets at 1% (176 MT).

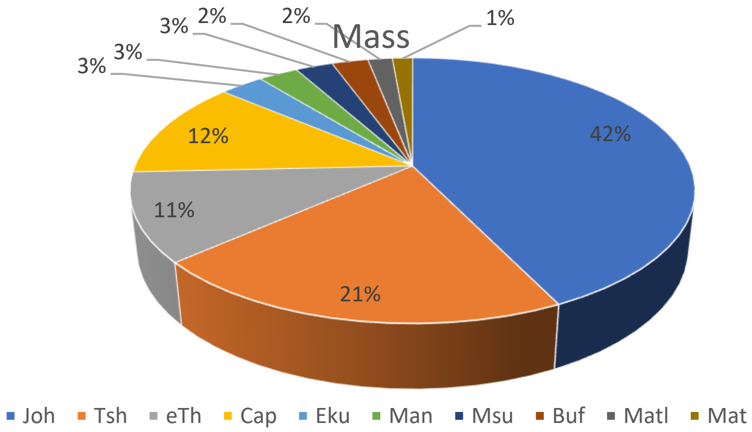


Figure 12: Estimated shares of smallholder farmers by mass in the top 10 markets for other fruits in Feb 2023

Source: SAUFM (2023)

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 45% (R63 million), Tshwane at 19% (R27 million), eThekwini at 12% (R17 million), Cape Town at 10% (R14 million) with Mangaung (R3.7 million) and Ekurhuleni (R3.6 million) while Buffalo City (R3.5 million), Msunduzi (R2 million) and Matlosana (R1.9 million) had the same share at 2% and 1%, respectively. Matjhabeng had the lowest share of smallholder farmers among the top ten fresh produce markets at 1% (R1.4 million).

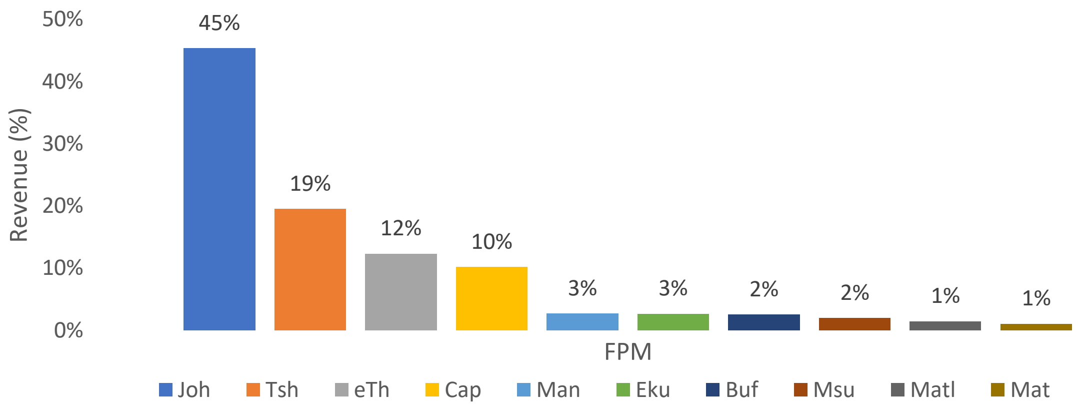
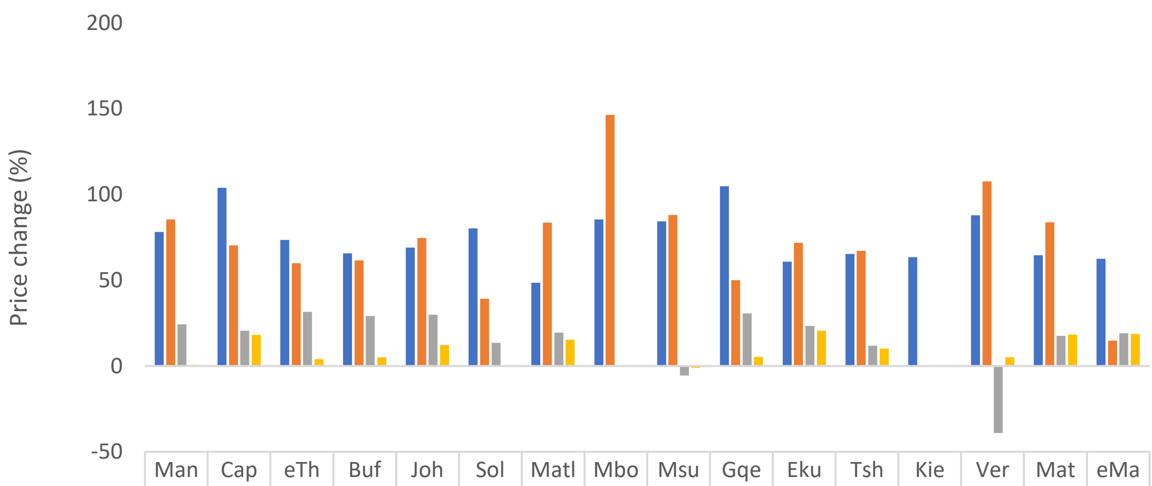


Figure 13: Estimated shares of smallholder farmers by revenue in the top 10 markets for other fruits in Feb 2023

Source: SAUFM (2023)

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 February 2022 and 2023. The average price change for potatoes was 72% and ranged from 49% in Matl to 105% in Gqeberha. This was followed by onions with an average price change of 72% over the reported period, ranging from 0% in Kie and Matjhabeng to 146% in Mbombela. Tomatoes had an average price change at 25%, ranging from -39% in Vereeniging to 32% in eThekwini. Finally, bananas had an average price change of 10%, ranging from -1% in Msunduzi to 18% in both Cape town and Matjhabeng. Overall, all the markets exhibited positive price changes for most agricultural products traded in FPM in February except for bananas.



	Man	Cap	eTh	Buf	Joh	Sol	Matl	Mbo	Msu	Gqe	Eku	Tsh	Kie	Ver	Mat	eMa
Potatoes	78	104	73	66	69	80	49	85	84	105	61	65	63	88	65	62
Onions	85	70	60	61	75	39	84	146	88	50	72	67	0	108	84	15
Tomatoes	24	21	32	29	30	14	19	0	-5	31	23	12	0	-39	18	19
Bananas	1	18	4	5	12	0	15	0	-1	5	21	10	0	5	18	19

Figure 14: Price trends for top four traded agricultural products in Feb 2023

Source: SAUFM (2023)

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 February 2023 the total mass traded from the NFPMs was 225 579 MT, generating a total revenue of R1.84 billion. Thirty percent (smallholder share) of this was estimated at 67 674 MT and R552 million, respectively. A further analysis of this at the provincial level show that GP was leading at 45 178 MT matched by a revenue of R366 million. This was followed by KZN at 8 053 MT (R66 million), WC at 6 739 MT (R66 million), EC at 3 088 MT (R23 million), FS at 2 927 MT (R21 million), NW at 1 360 MT (R9 million) and MP at 197 MT (R1 million). The NC had the lowest share from smallholder farmers at 131 MT (R931 568 million). A further analysis of the top 10 fresh produce markets shows that the Johannesburg market commanded the list of the top ten fresh produce markets at 29 238 MT (R244 million), followed by Tshwane at 13 349 MT (R104 million), Cape Town at 6 739 MT (R66 million), eThekwini at 6 715 MT (R61 million), Ekurhuleni at 2 364 MT (R16 million), Buffalo City at 1 841 MT (R14 million), Mangaung at 1 818 MT (R14 million), Matlosana at 1 360 MT (R9 million), Msunduzi at 1 338 MT (R9 million) and Gqeberha at 1 235 MT (R8 million). Product-wise, potatoes commanded the largest share of produce sold, followed by onions, tomatoes, and bananas. A significant volume of other fruits and vegetables was traded in the NFPM system over the reported period. Overall, all the markets exhibited positive price changes for the top four agricultural products traded in the month of February, except for tomatoes.

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