# SMALLHOLDER MARKET ACCESS ESTIMATES

## MARCH 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 March 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 limited to potatoes, onions, tomatoes, bananas and other 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 – MAR 23

In March 2023 the total mass traded at the NFPMs was 269 284 MT, generating a total revenue of R2.1 billion (see Table 1). This indicates 6% (16 952 MT) decline in volume trade and 24% (R421 628 356 million) increase in revenue compared to the same month during the previous year. This increase in revenue from reduced volumes traded is an indication that prices were higher during the period under review and this is in line with generally higher food price inflation experience during the same period.

**Table 1: Summary of fresh produce market statistics by top commodities in Mar 2023**

| Commodity | Revenue | Mass |
|---|---|---|
| Total | R2 163 538 988 | 269 284 |
| Potatoes | R506 145 612 | 90 895 |
| Onions | R258 134 186 | 29 976 |
| Tomatoes | R234 611 349 | 20 201 |
| Bananas | R207 991 356 | 22 172 |
| Other vegetables | R451 234 383 | 55 135 |
| Other fruits | R505 422 103 | 50 905 |

Source: SAUFM (2023)

Potatoes had a total mass of 90 895 MT, indicating a decrease of 7% compared to the same month in the previous year. The revenue increased by 25% during the same period to reach R506 million. The total mass for onions decreased by 16% (5 863 MT) to reach 29 976 MT in March 2023 while the revenue grew by 72% (R108 million) to reach R258 million. Tomatoes had a total mass of 20 201 MT, indicating a decrease of 3 % (translated as 540 MT) and this traded mass was matched by total revenue of R234 million, indicating a 33% increase compared to the previous year. Bananas showed an increase of 3% (713 MT) in mass traded, matched by an increase of 18% (R32 million) to reach R207 million in revenue during March 2023. Other vegetables traded in the system recorded a decrease of 4% (2 535 MT) in mass traded matched by an increase of 24% (R88 million) in revenue. Other fruits recorded a decrease of 4% (1 981 MT) to reach a total traded mass of 50 905 MT in March 2023. The revenue of these fruits grew by 7% (R32 million) to reach R505 million over the reported period.

## 3. ESTIMATED SHARE OF SMALLHOLDER FARMERS

This section analyses the ideal estimated share of smallholder farmers by the top four performing agricultural products (potatoes, onions, tomatoes, and bananas) as well as 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.

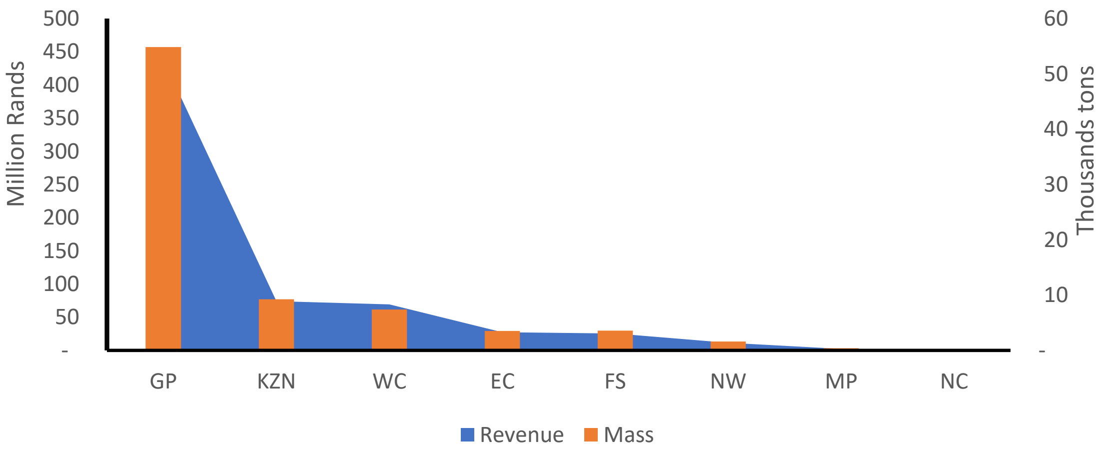



**Figure 1: Summary of estimated share of smallholder farmers in different provinces by revenue and mass in March 2023.**
Source: SAUFM (2023)

For the entire month of March 2023, the ideal share (30%) of smallholder farmers in terms of mass and revenue was estimated at 80 785 MT and R649 million, respectively. A further analysis of this at the provincial level shows that GP was leading at 54 814 MT matched by a revenue of R437 million (See Figure 1). This was followed by KZN at 9 260 MT (R73 million), WC at 7 367 MT (R69 million), EC at 3 545 MT (R27 million), FS at 2 565 MT (R25 million), NW at 1 632 MT (R11 million) and MP at 399 MT (R2 million). The NC had the lowest share at 204 MT (R1 million).

In terms of market analysis, the Johannesburg Market commanded the list of the top ten fresh produce markets at 35 904 MT (R297 million), followed by Tshwane at 15 588 MT (R118 million), Cape Town at 7 367 MT (R69 million), eThekwini at 7 792 MT (R64 million), Ekurhuleni at 3 004 MT (R19 million), Buffalo City at 2 043 MT (R16.46 million), Mangaung at 2 187 MT (R16.45 million), Matlosana at 1 632 MT (R11 million), Gqeberha at 1 486 MT (R10 million), Msunduzi at 1 468 MT (R9 million) and Matjhabeng at 1 378 MT (R9 million) (see Table 2).

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

| Market | Revenue | Mass |
|---|---|---|
| Johannesburg | 297 916 039 | 35 904 |
| Tshwane | 118 639 199 | 15 588 |
| Cape Town | 69 417 270 | 7 367 |
| eThekwini | 64 085 380 | 7 792 |
| Ekurhuleni | 19 334 923 | 3 004 |
| Buffalo City | 16 458 568 | 2 043 |
| Mangaung | 16 454 690 | 2 187 |
| Matlosana | 11 369 123 | 1 632 |
| Gqeberha | 10 855 746 | 1 486 |
| Msunduzi | 9 826 720 | 1 468 |
| Matjhabeng | 8 937 213 | 1 378 |
| Vereeniging | 1 709 312 | 318 |
| Sol Plaatje | 1 498 466 | 204 |
| eMalahleni | 1 397 934 | 221 |
| Mbombela | 1 119 725 | 178 |
| Kei | 41 387 | 16 |

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 R95 million derived from 17 640 MT (see Table 3). This was followed by KZN at R18 million (3 497 MT), WC at R13 million (1 954 MT), EC at R9 million (1 446 MT), FS at R8 million (1 617 MT) and NW at R4 million (771 MT). The NC was at R1.5 million (280 MT) while MP at R425 217 (64 MT). The overall share in potatoes was R151 million (27 269 MT).

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

| Province | Revenue | Mass |
|---|---|---|
| GP | R95 940 306 | 17 640 |
| KZN | R18 500 196 | 3 497 |
| WC | R13 610 249 | 1 954 |
| FS | R8 081 152 | 1 617 |
| EC | R9 560 885 | 1 446 |
| NW | R4 128 258 | 771 |
| NC | R1 597 422 | 280 |
| MP | R425 217 | 64 |

Source: SAUFM (2023)

Figure 2 shows the estimated share of smallholder farmers in the top 10 markets for potatoes in March 2023. Johannesburg led at 10 991 MT (40%), followed by Tshwane at 4 939 MT (18%), eThekwini at 2 817 MT (10%), Cape Town at 1 954 MT (7%) and Ekurhuleni at 1 458 MT (5%). Other markets in the top ten included Buffalo City (812 MT), Gqeberha (791 MT), Matlosana (771 MT) and Mangaung (767 MT) with each commanding the same share at 3%. The Matjhabeng (680 MT) had the least share in potatoes among the top ten markets at 2%.

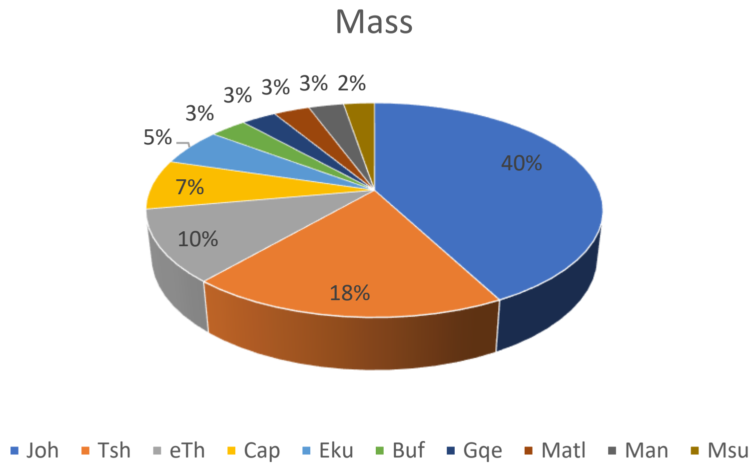



**Figure 2: Estimated share of smallholder farmers by mas in the top 10 markets for potatoes in March 2023**

Source: SAUFM (2023)

The estimated of smallholder farmers by revenue in the top 10 markets for potatoes in March 2023 is presented in Figure 3. The Johannesburg Market led at R60 million (40%), followed by Tshwane at R26 million (18%), eThekwini at R15 million (10%), Cape Town at R13 million (9%), and Ekurhuleni at R7 million (5%). The Gqeberha (R4.79 million), Buffalo City (R4.73 million), Mangaung (R4.45 million), and Matlosana (R4.12 million) markets had the same share at 3%. Matjhabeng (R3.6 million) commanded the least share of smallholder farmers in potatoes among the top ten at 2%.

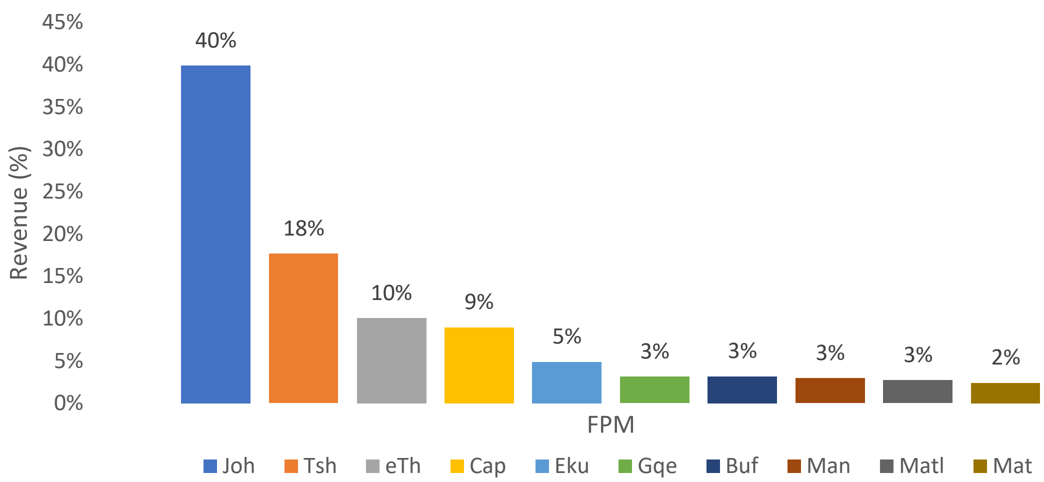



**Figure 3: Estimated shares of smallholder farmers by revenue in the top 10 markets for potatoes in March 2023**

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 R53 million in revenue, derived from 6 354 MT in mass, followed by KZN at R10 million (1 152 MT), WC at R6 million (755 MT), EC at R3 million (369 MT), FS at R1 million (218 MT), NW at R915 638 (102 MT) and MP at R216 539 (29 MT).

The NC at R102 530 (14 MT) had the lowest share of smallholder farmers in onions. The overall share was R77 million and 8 993 MT.

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

| Province | Revenue | Mass |
|---|---|---|
| GP | R53 921 664 | 6 354 |
| KZN | R10 856 578 | 1 152 |
| WC | R6 132 428 | 755 |
| EC | R3 411 595 | 369 |
| FS | R1 883 285 | 218 |
| NW | R915 638 | 102 |
| MP | R216 539 | 29 |
| NC | R102 530 | 14 |

Source: SAUFM (2023)

Onions were the second largest traded commodity in NFPMs in terms of mass in March 2023. The results presented in Figure 4 show that the Johannesburg Market commanded the largest share of smallholder farmers at 4 663 MT (52%). It was followed by Tshwane at 1 436 MT (16%), eThekwini at 1 054 MT (12%), Cape Town at 755 MT (8%), and Ekurhuleni at 244 MT (3%). Buffalo City (214 MT) and Gqeberha (155 MT) markets had the same share at 2% while other markets including Mangaung (126 MT) and Matlosana (102 MT) also had the same share at 1%. Msunduzi (98 MT) had the least share of smallholder farmers in onions among the top ten markets at 1%.

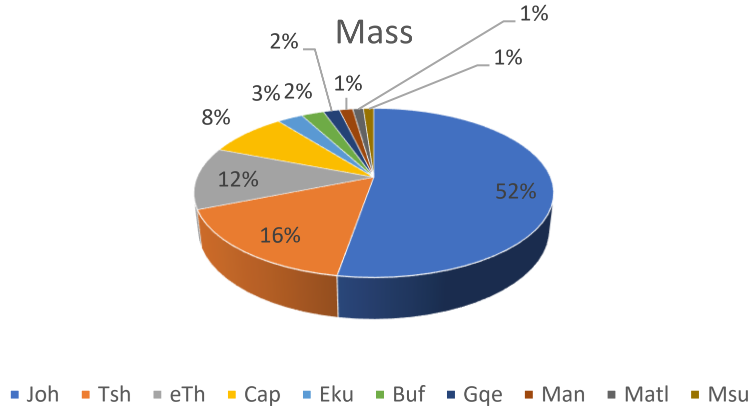



**Figure 4:** **Estimated shares of smallholder farmers by mass in the top 10 markets for onions in March 2023**

Source: SAUFM (2023)

The estimated shares of smallholder farmers by revenue in onions in the top 10 markets, measured in percentages, are presented in Figure 5. Leading the list of the top 10 markets was Johannesburg at 52% (R40 million), followed by Tshwane at 15% (R11 million), eThekwini at 13% (R9 million), Cape Town at 8% (R6 million), and Buffalo City at 3% (R1.9 million). The Ekurhuleni (R1.60 million), Gqeberha (R1.42 million) and Mangaung (R1.18 million) markets had the same share at 2% while Matlosana (R915 537) was at 1%. The Msunduzi (R867 908) market had the lowest share of smallholder farmers in onions at 1%.

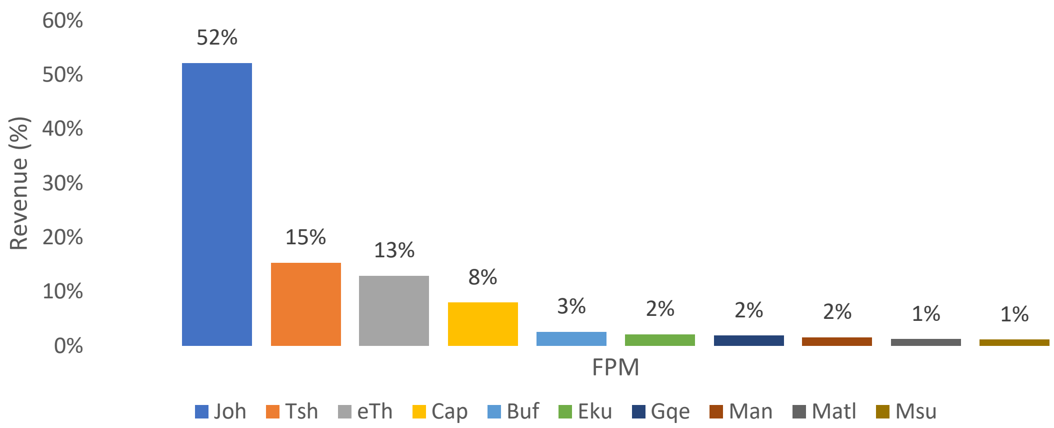



**Figure 5:** **Estimated shares of smallholder farmers by revenue in the top 10 markets for onions in March 2023**

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 R47 million in revenue derived from a total mass of 4 175 MT, followed by WC at R9 million (717 MT), KZN at R6 million (546 MT), FS at R3 million (266 MT), EC at R2 million (190 MT), NW at R1 million (111 MT) and NC at R485 672 (47 MT). The MP province was at R76 140 (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 R70 million in revenue derived from a total mass of 6 060 MT.

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

| Province | Revenue | Mass |
|---|---|---|
| GP | R47 765 443 | 4175 |
| WC | R9 145 396 | 717 |
| KZN | R6 161 493 | 546 |
| FS | R3 194 399 | 266 |
| EC | R2 134 991 | 190 |
| NW | R1 419 872 | 111 |
| NC | R485 672 | 47 |
| MP | R76 140 | 9 |

Source: SAUFM (2023)

Tomatoes were the fourth largest traded commodity at NFPM in March 2023. The Johannesburg Market commanded the largest share of smallholder farmers at 48%, translated as 2 886 MT (see Figure 6). This market was followed by Tshwane at 1 051 MT (17%), Cape Town at 717 MT (12%), eThekwini at 512 MT (8%), Ekurhuleni at 238 MT (4%) and Mangaung at 112 MT (3%). The Matlosana (111 MT), Matjhabeng (100 MT) and Buffalo

City (89 MT) markets stood at 2%. The Gqeberha (47 MT) market had the least share of smallholder farmers in tomatoes among the top ten markets at 1%.

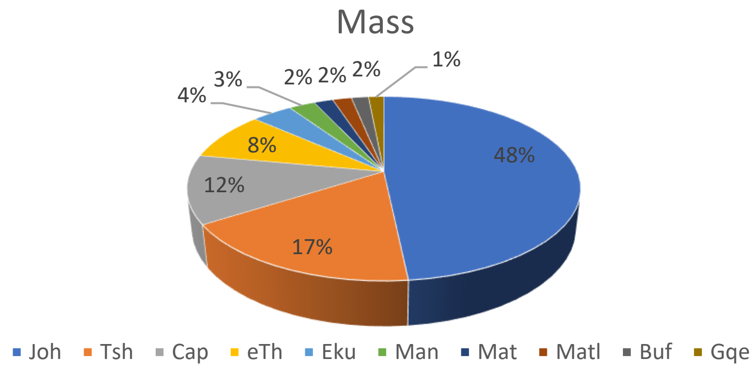



**Figure 6: Estimated share of smallholder farmers by mass in the top 10 markets for tomatoes in March 2023**

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% (R33 million), Tshwane at 17% (R12 million), Cape Town at 13% (R9 million), eThekwini at 8% (R5 million), with Ekurhuleni (R2.1 million) and Mangaung (R1.8 million) both at 3%. The Matlosana (R1.4 million), Matjhabeng (R1.3 million) and Gqeberha (R1.07 million) had the same share at 2%. Buffalo City (R1.05 million) had the lowest share of smallholder farmers in tomatoes among the top ten markets at 1%.

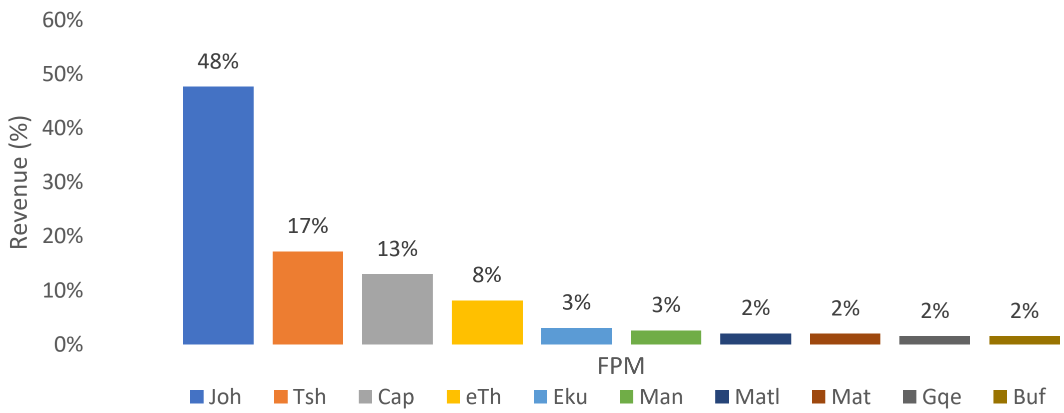



**Figure 7: Estimated share of smallholder farmers by revenue in the top 10 markets for tomatoes in March 2023**

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 R34 million derived from a total mass of 3 734 MT, followed by WC at R9 million (958 MT), KZN at R8 million (885 MT), EC at R5 million (537 MT), FS at R3 million (359 MT) and NW at R1 million (144 MT).

MP had the lowest estimated share of smallholder farmers in bananas at R347 569 (36 MT) over the reported month. The overall estimated smallholder share for bananas was R62 million and 6 652 MT.

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

| Province | Revenue | Mass |
|---|---|---|
| GP | R34 788 075 | 3 734 |
| WC | R9 188 946 | 958 |
| KZN | R8 099 959 | 885 |
| EC | R5 404 916 | 537 |
| FS | R3 284 321 | 359 |
| NW | R1 283 621 | 144 |
| MP | R347 569 | 36 |
| NC | R0 | 0.00 |

Source: SAUFM (2023)

Bananas constituted the most traded fruit on the FPM system in March 2023. The Johannesburg Market commanded the largest share of smallholder farmers at 32% (2 105 MT) (see Figure 8). It was followed by Tshwane at 21% (1 406 MT), Cape Town at 13% (885 MT), eThekwini at 11% (708 MT), Buffalo City at 5% (357 MT) and Mangaung at 4% (258 MT). The Msunduzi (250 MT) and Ekurhuleni (204 MT) markets were both at 3% while Gqeberha was at 2% (180 MT). Among the top ten markets, Matlosana fresh produce market (144 MT) commanded the least estimated share of smallholder farmers at 2%.

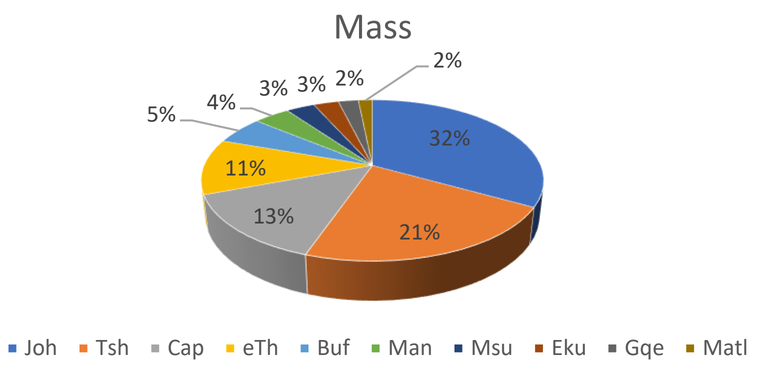



**Figure 8:** **Estimated shares of smallholder farmers by mass in top 10 markets for bananas in March 2023**

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue in the top 10 markets for bananas in March 2023, measured in percentages is presented in Figure 9. Leading the list of the top 10 markets was Johannesburg at 32% (R19 million), followed by Tshwane at 21% (R12 million), Cape Town at 15% (R9 million), eThekwini at 10% (R6 million), Buffalo City at 6% (R3 million) and Mangaung at 4% (R2 million). Other markets including Msunduzi (R1.95 million), Gqeberha (R1.95 million) and Ekurhuleni (R1.83 million) were at 3%. The Matlosana (R1.28 million) fresh produce market had the least share at 2%.

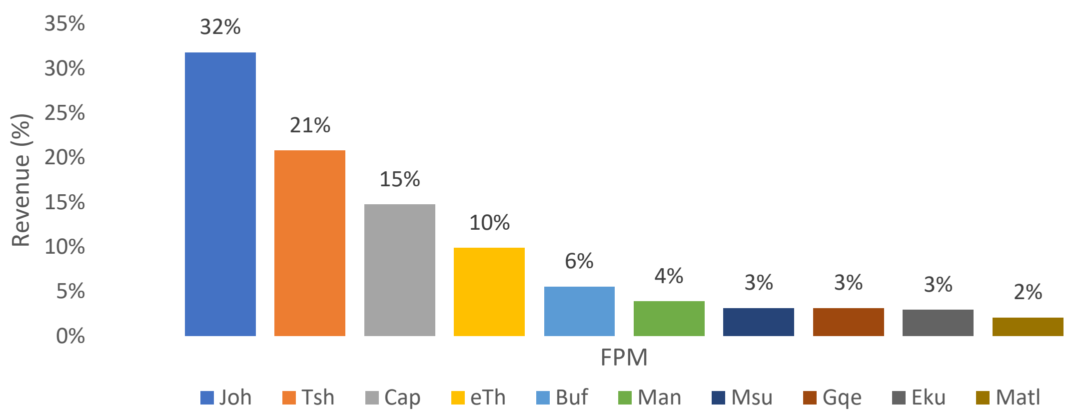



**Figure 9:** **Estimated shares of smallholder farmers by revenue in the top 10 markets for bananas in March 2023**

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 R98 million derived from a total mass of 12 436 MT. This was followed by WC at R16 million (1 623 MT), KZN at R10 million (1 051 MT), FS at R3.7 million (419 MT), EC at R3 million (659 MT), and NW at R1 million (273 MT).

The NC had an estimated share of R213 975 (28 MT) while MP stood at R110 271 (53 MT). The overall share of smallholder farmers in other vegetables in March 2023 in value and mass was R135 million and 16 541 MT, respectively.

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

| Province | Revenue | Mass |
|---|---|---|
| GP | R98 420 637 | 12 436 |
| WC | R16 809 905 | 1 623 |
| KZN | R10 667 446 | 1 051 |
| FS | R3 746 406 | 419 |
| EC | R3 502 907 | 659 |
| NW | R1 782 222 | 273 |
| NC | R213 975 | 28 |
| MP | R110 271 | 53 |

Source: SAUFM (2023)

Market shares for smallholder farmers in other vegetables traded in the various fresh produce markets in March 2023 are illustrated in Figure 10. The Johannesburg Market commanded the largest share at 51% (8 416 MT) (see Figure 10), followed by Tshwane at 22% (3 629 MT), Cape Town at 10% (1 623 MT), eThekwini at 6% (986 MT), Mangaung at 3% (476 MT). Ekurhuleni (372 MT), Matlosana (273 MT) and Buffalo City (241 MT) markets commanded the same share at 2% while Buffalo City (182 MT) and Matjhabeng (176 MT) stood at 1%. The

Gqeberha (65 MT) market commanded the lowest share of smallholder farmers among the top ten markets also at 1%.

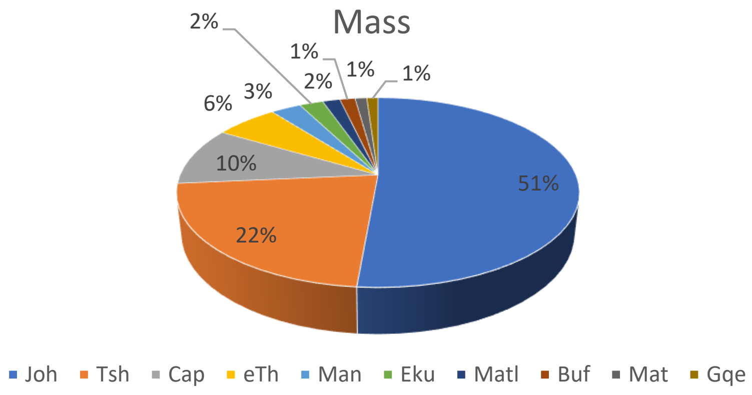



**Figure 10: Estimated shares of smallholder farmers by mass in the top 10 markets for other vegetables in March 2023**

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue in the top 10 markets for other vegetables in March 2023, measured in percentages is presented in Figure 11. Leading the list of the top 10 markets was Johannesburg at 53% (R71 million), Tshwane at 18% (R24 million), Cape Town at 12% (R16 million), and eThekwini at 7% (R9 million). The Mangaung (R2.8 million), Ekurhuleni (R2.2 million) and Buffalo City (R2.2 million) markets commanded the same share at 2%. Other markets with the same share of 1% include Matlosana (R1.7 million) and Gqeberha (R1.2 million). The Matjhabeng (R896 434) had the least share of revenue for smallholder farmers among the top ten markets at 1%.

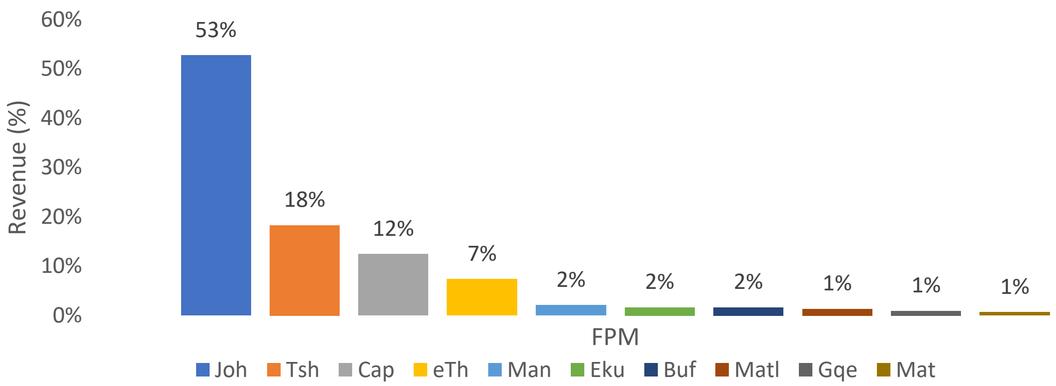



**Figure 11: Estimated shares of smallholder farmers by revenue in the top 10 markets for other vegetables in March 2023**

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 March 2023. The GP province was leading with a revenue of R106 million derived from a total mass of 10 476 MT, followed KZN at R19 million (2 055 MT), WC at R14 million (1 432 MT), FS at R5 million (618 MT), EC at R3 million (414 MT), and NW at R1 million (231 MT).

The NC province was at R213 975 (26 MT) while MP commanded the lowest estimated share of smallholder farmers in other fruits at R110 271 (18 MT). The estimated overall revenue share from the sale of other fruits on the fresh produce markets by smallholder farmers was R151 million matched by 15 272 MT.

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

| Province | Revenue | Mass |
|---|---|---|
| GP | R106 763 349 | 10 476 |
| KZN | R19 626 429 | 2 055 |
| WC | R14 530 347 | 1 432 |
| FS | R5 202 340 | 618 |
| EC | R3 340 408 | 414 |
| NW | R1 839 513 | 231 |
| NC | R213 975 | 26 |
| MP | R110 271 | 18 |

Source: SAUFM (2023)

Market shares for other fruits traded in the various fresh produce markets in March 2023 are illustrated in Figure 12. The Johannesburg Market commanded the largest share of smallholder farmers at 45% (6 844 MT) (see Figure 12), followed by Tshwane at 20% (3 126 MT), eThekwini at 11% (1 715 MT), Cape Town at 9% (1 432 MT) with Ekurhuleni (488 MT) and Mangaung (407 MT) markets both at 3%. The Msunduzi (341 MT), Buffalo City (319 MT) and Matlosana (231 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% (212 MT).

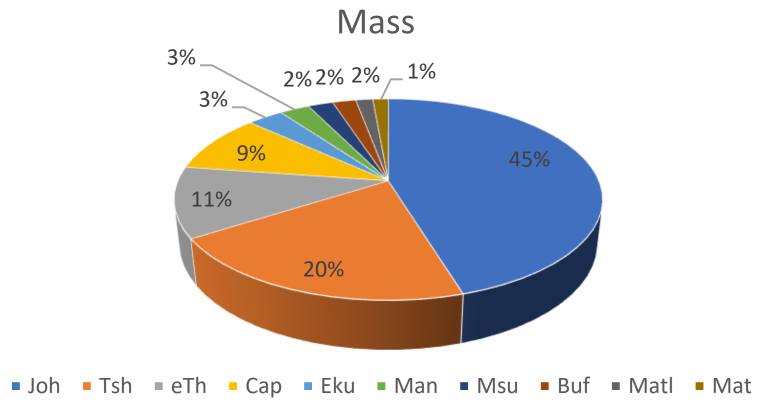



**Figure 12: Estimated shares of smallholder farmers by mass in the top 10 markets for other fruits in March 2023**

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue in top 10 markets for other fruits in March 2023, measured in percentages is presented in Figure 13. Leading the list of the top 10 markets was Johannesburg at 48% (R72 million), Tshwane at 20% (R30 million), eThekwini at 11% (R17 million), Cape Town at 10% (R14 million) and Ekurhuleni at 3% (R4 million). The Mangaung (R3 million), Buffalo City (R2.9 million) and Msunduzi (R2.6 million) markets had the same share at 2% while Matlosana stood at 1% (R1.4 million). Matjhabeng had the lowest share of smallholder farmers among the top ten fresh produce markets at less than 1% (R375 160).

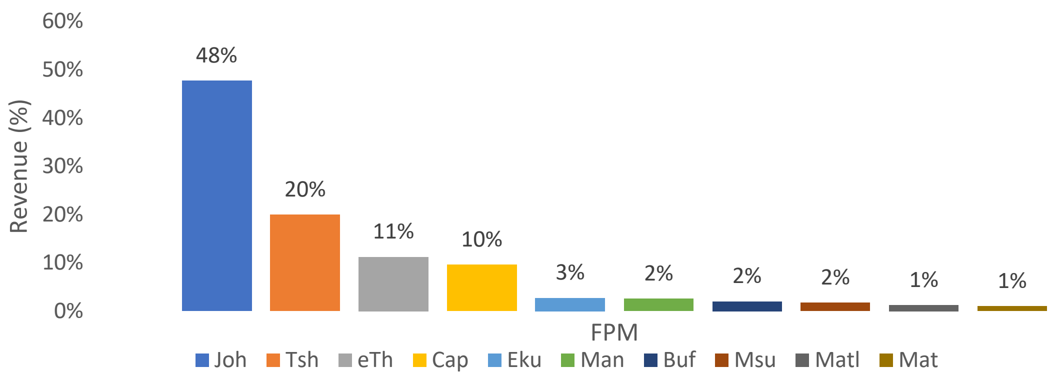
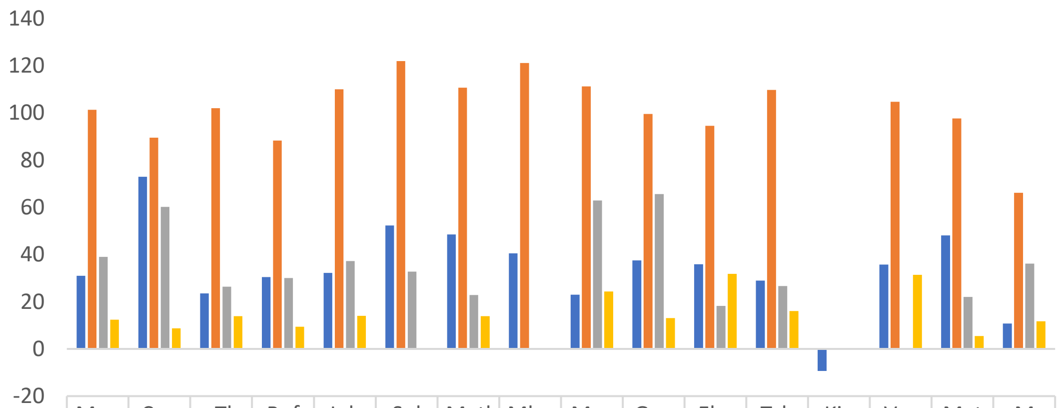



**Figure 13: Estimated shares of smallholder farmers by revenue in the top 10 markets for other fruits in March 2023**

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 March 2022 and March 2023. The average price change for potatoes was 35% and ranged from -9% in Kie to 73% in Cape Town. Onions had an average price change of 106% over the reported period, ranging from 0% in Kie to 122% in Sol Plaatjie. An average price change of 37% was observed in tomatoes across the markets, with a range from 0% in Vereeniging, Mbombela and Kie to 66% in Gqeberha. Finally, bananas had an average price change of 14%, ranging from 0% in Sol Plaatjie, Mbombela and Kie to 32% in Ekurhuleni. Overall, all the markets exhibited positive price changes for all the top-four agricultural products traded in FPM in March 2023. This supports the earlier observation made in the overview that the increase in revenue from reduced volumes traded in the markets is an indication that prices were higher during the period under review. This is in line with generally higher food price inflation experienced during the same period.




| | Man | Cap | eTh | Buf | Joh | Sol | Matl | Mbo | Msu | Gqe | Eku | Tsh | Kie | Ver | Mat | eMa |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Potatoes | 31 | 73 | 24 | 30 | 32 | 52 | 48 | 40 | 23 | 38 | 36 | 29 | -9 | 36 | 48 | 11 |
| Onions | 101 | 90 | 102 | 88 | 110 | 122 | 111 | 121 | 111 | 99 | 94 | 110 | 0 | 105 | 98 | 66 |
| Tomatoes | 39 | 60 | 26 | 30 | 37 | 33 | 23 | 0 | 63 | 66 | 18 | 27 | 0 | 0 | 22 | 36 |
| Bananas | 12 | 9 | 14 | 9 | 14 | 0 | 14 | 0 | 24 | 13 | 32 | 16 | 0 | 31 | 5 | 12 |

**Figure 14: Price trends for top four traded agricultural products in March 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 March 2023 the total mass traded at the NFPMs was 269 284 MT, generating a total revenue of R2.1 billion. Thirty percent (smallholder share) of this in mass and revenue was estimated at 80 785 MT and R649 million. A further analysis of this at the provincial level shows that GP was leading at 54 814 MT matched by a revenue of R437 million. This was followed by KZN at 9 260 MT (R73 million), WC at 7 367 MT (R69 million), EC at 3 545 MT (R27 million), FS at 2 565 MT (R25 million), NW at 1 632 MT (R11 million) and MP at 399 MT (R2 million). The NC had the lowest share at 204 MT (R1 million). By top 10 fresh produce markets, the Johannesburg Market commanded the list of the top ten fresh produce markets at 35 904 MT (R297 million), followed by Tshwane at 15 588 MT (R118 million), Cape Town at 7 367 MT (R69 million), eThekwini at 7 792 MT (R64 million), Ekurhuleni at 3 004 MT (R19 million), Buffalo City at 2 043 MT (R16.46 million), Mangaung at 2 187 MT (R16.45 million), Matlosana at 1 632 MT (R11 million), Gqeberha at 1 486 MT (R10 million), and Msunduzi at 1 468 MT (R9 million). The estimates for each product show that potatoes commanded the largest share of produce sold, followed by onions, tomatoes, and bananas. A significant volume of other fruits and vegetables was also 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 March 2023.

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SAUFM is acknowledged for providing monthly data to the NAMC.

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