NAMC
Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

MAY 2023

National Agricultural Marketing Council

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ABBREVIATIONS

For the purpose of this report the following acronyms are used:

- Buf Buffalo City
- Cap Cape Town
- EC Eastern Cape
- Eku Ekurhuleni
- eTh eThekwini
- FPM Fresh Produce Market
- FS Free Sate
- GP Gauteng
- Gqe Gqeberha
- Joh Johannesburg
- KZN Kwa-Zulu Natal
- Man Mangaung
- Mat Matjhabeng
- Matl Matlosana
- MP Mpumalanga
- MT Metric Tons
- NAMC National Agricultural Marketing Council
- NFPM National Fresh Produce Market
- NW North West
- SAUFM South African Union of Food Markets
- Tsh Tshwane
- WC Western Cape

1. BACKGROUND

This report provides estimates of an ideal performance of smallholder farmers in the National Fresh Produce Markets (NFPM) in South Africa during May 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 – MAY 2023

In May 2023 the total mass traded at the NFPMs was 265 873 MT, generating a total revenue of R2.06 billion (see Table 1). This indicates 1.06% (2 855 MT) decline in volume traded and a 30% (R477 390 753 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 experienced during the same period.

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

Commodity	Revenue	Mass
Total	R2 062 919 992	265 873
Potatoes	R541 955 296	87 562
Onions	R366 420 215	26 075
Tomatoes	R190 529 889	20 870
Bananas	R178 920 886	26 611
Other vegetables	R392 818 154	57 205
Other fruits	R392 275 551	47 550

Source: SAUFM (2023)

Potatoes had a total mass of 87 562 MT, indicating a decrease of 0.99% compared to the same month in the previous year. The revenue increased by 39% during the same period to reach R541 million. The total mass for onions decreased by 18% (5 881 MT) to reach 26 075 MT in May 2023 while the revenue grew by 118% (R198 million) to reach R366 million. Tomatoes had a total mass of 20 870 MT, indicating a decrease of 3% (translated as 675 MT) and this traded mass was matched by total revenue of R190 million, indicating a 21% increase compared to the previous year. Bananas showed an increase of 27% (5 722 MT) in mass traded, matched by an increase of 18% (R26 million) to reach R178 million in revenue during May 2023. Other vegetables traded in the system recorded an increase of 4% (2 118 MT) in mass traded matched by an increase of 14% (R47 million) in revenue. Other fruits recorded an increase of 9% (4 616 MT) to reach a total traded mass of 47 550 MT in May 2023. The revenue of these fruits grew by 6% (R21 million) to reach R392 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 from or representing the share of smallholder farmers in the NFPM system in South Africa.

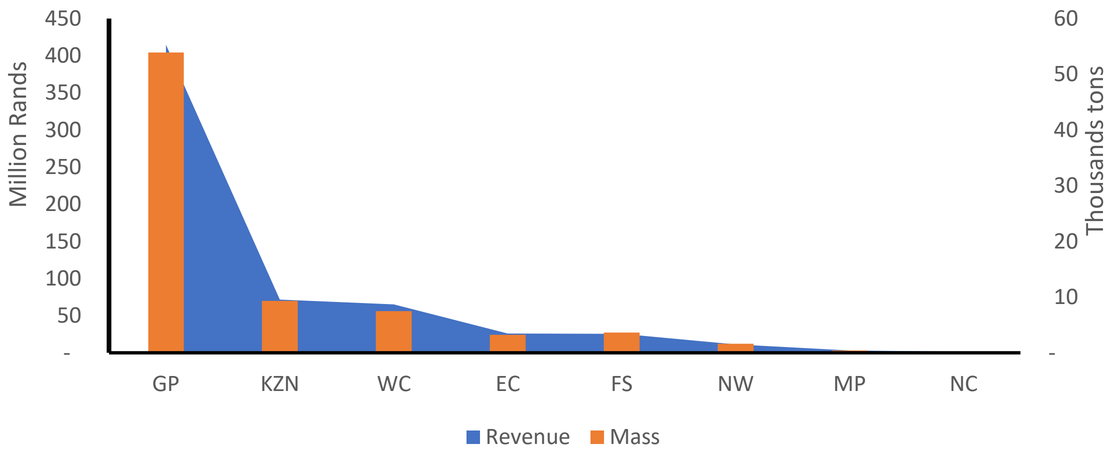


Figure 1: **Summary of estimated share of smallholder farmers in different provinces by revenue and mass in May 2023.**
Source: SAUFM (2023)

For the entire month of May 2023, the ideal share (30%) of smallholder farmers in terms of mass and revenue was estimated at 79 762 MT and R618 million, respectively. A further analysis at the provincial level shows that GP was leading at 53 911 MT matched by a revenue of R414 million (See Figure 1). This was followed by KZN at 9 297 MT (R71 million), WC at 7 492 MT (R65 million), EC at 3 215 MT (R26 million), FS at 3 663 MT (R25 million), NW at 1 602 MT (R11 million) and MP at 503 MT (R3 million). The NC had the lowest share at 179 MT (R1 million).

In terms of market analysis, the Johannesburg Market commanded the largest share from the list of the top ten fresh produce markets at 34 770 MT (R278 million), followed by Tshwane at 15 487 MT (R113 million), Cape Town at 7 492 MT (R65 million), eThekwini at 7 711 MT (R61 million), Ekurhuleni at 3 260 MT (R20 million), Buffalo City at 1 956 MT (R15.8 million), Mangaung at 2 207 MT (R15.7 million), Matlosana at 1 602 MT (R11 million), Msunduzi at 1 586 MT (R10.33 million), Gqeberha at 1 260 MT (R10.31 million), and Matjhabeng at 1 455 MT (R9 million) (see Table 2).

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

Market	Revenue	Mass
Johannesburg	278 519 483	34 770
Tshwane	113 350 702	15 487
Cape Town	65 121 465	7 492
eThekwini	61 321 632	7 711
Ekurhuleni	20 531 023	3 260
Buffalo City	15 866 125	1 956
Mangaung	15 790 299	2 207
Matlosana	11 438 335	1 602
Msunduzi	10 335 098	1 586
Gqeberha	10 313 864	1 260
Matjhabeng	9 693 371	1 455
Vereeniging	2 295 727	394
eMalahleni	1 716 762	261
Mbombela	1 309 362	141
Sol Plaatje	1 272 751	179
Kei	-	-

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 R105 million derived from 16 941 MT (see Table 3). This was followed by KZN at R19 million (3 289 MT), WC at R15 million (2 376 MT), EC at R8.1 million (1 333 MT), FS at R8.5 million (1 381 MT) and NW at R4 million (664 MT). The MP was at R1.6 million (238 MT) while NC was at R271 876 (47 MT). The overall share in potatoes was R162 million (26 269 MT).

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

Province	Revenue	Mass
GP	R105 658 438	16 941
KZN	R19 182 541	3 289
WC	R15 099 424	2 376
EC	R8 186 152	1 333
FS	R8 540 773	1 381
NW	R4 011 865	664
MP	R1 635 520	238
NC	R271 876	47

Source: SAUFM (2023)

Figure 2 shows the estimated share of smallholder farmers in the top 10 markets for potatoes in May 2023. Johannesburg led at 10 542 MT (40%), followed by Tshwane at 4 690 MT (18%), eThekwini at 2 637 MT (10%), Cape Town at 2 376 MT (9%) and Ekurhuleni at 1 460 MT (6%). Other markets in the top ten included Buffalo City (791 MT), Mangaung (724 MT), Matlosana (664 MT) and, Matjhabeng (658 MT) with each commanding the same share of 3%. The Gqeberha (653 MT) had the least share in potatoes among the top ten markets at 2%.

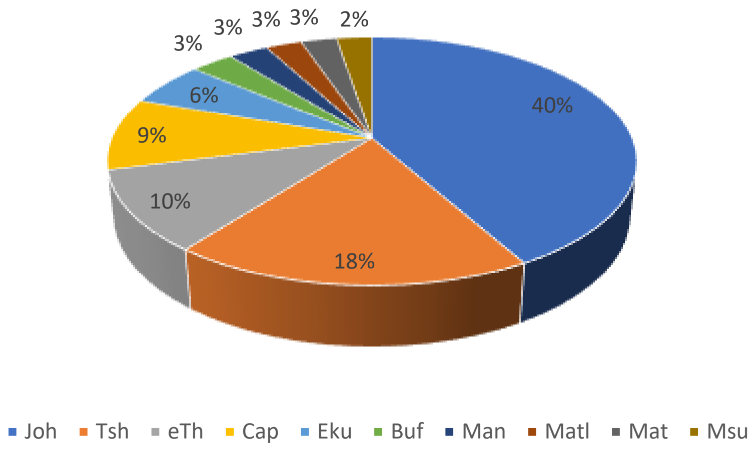


Figure 2: Estimated share of smallholder farmers by mass in the top 10 markets for potatoes in May 2023

Source: SAUFM (2023)

The estimated of smallholder farmers by revenue in the top 10 markets for potatoes in May 2023 is presented in Figure 3. The Johannesburg Market led at R65 million (40%), followed by Tshwane at R30 million (19%), eThekwini at R15 million (10%), Cape Town at R15 million (9%), and Ekurhuleni at R8 million (5%). The Buffalo City (R5 million) and Mangaung (R4.4 million) markets commanded the same share of 3% while Matlosana (R4.0 million), Matjhabeng (R3.7 million) and Msunduzi (R3.6 million) markets also had the same share of 2%.%.

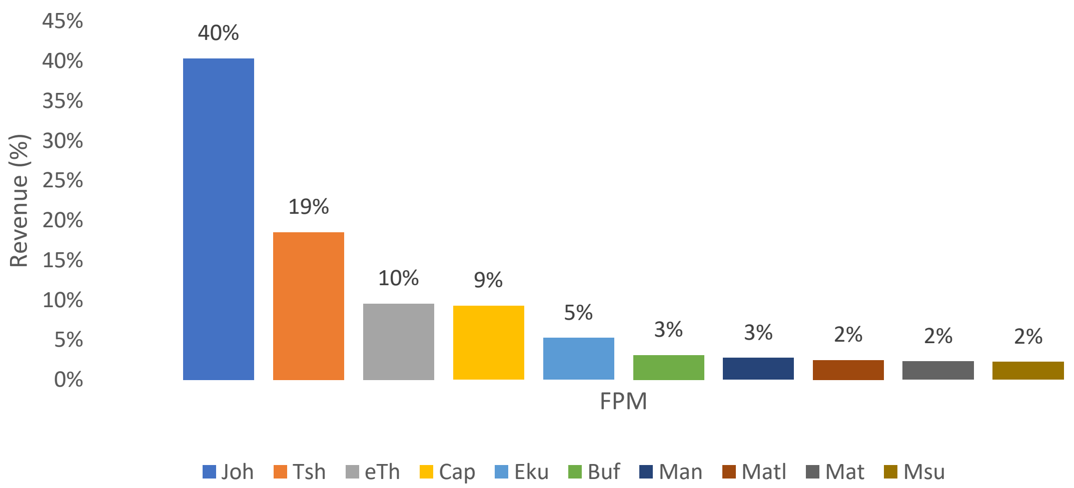


Figure 3: Estimated shares of smallholder farmers by revenue in the top 10 markets for potatoes in May 2023

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 R60 million in revenue, derived from 5 418 MT in mass, followed by KZN at R16 million (1 095 MT), WC at R7 million (579 MT), EC at R5 million (368 MT), FS at R2 million (209 MT), NW at R1 million (105 MT) and MP at R589 559 (40 MT). The NC at R87 218 (9 MT) had the lowest share of smallholder farmers in onions. The overall share was R109 million and 7 823 MT.

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

Province	Revenue	Mass
GP	R75 879 297	5 418
KZN	R16 096 682	1 095
WC	R7 677 340	579
EC	R5 244 050	368
FS	R2 895 929	209
NW	R1 455 991	105
MP	R589 559	40
NC	R87 218	9

Source: SAUFM (2023)

Onions were the second largest traded commodity in NFPMs in terms of mass in May 2023. The results presented in Figure 4 show that the Johannesburg Market commanded the largest share of smallholder farmers at 3 845 MT (49%). It was followed by Tshwane at 1 378 MT (18%), eThekwini at 992 MT (13%), Cape Town at 579 MT (7%). and Buffalo City at 195 MT (2%). The Ekurhuleni (185 MT), Gqeberha (174 MT) and Mangaung (121 MT) also had the same share at 2% while Matlosana (105 MT) markets stood at 1%. Msunduzi market had the least share of smallholder farmers in onions among the top ten markets at 1%(103 MT).

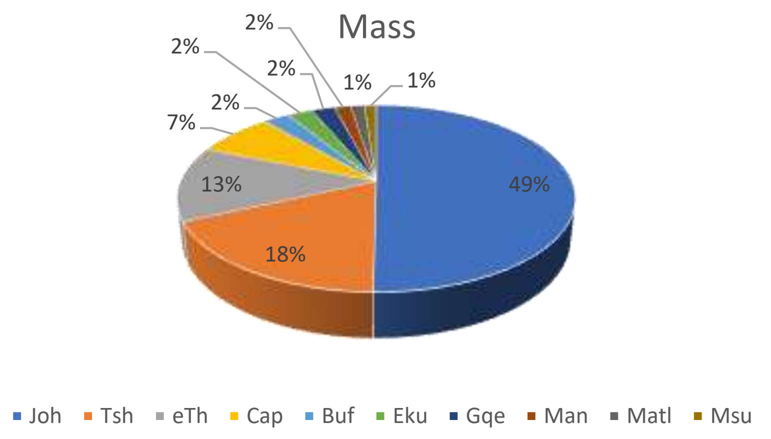


Figure 4: Estimated shares of smallholder farmers by mass in the top 10 markets for onions in May 2023

Source: SAUFM (2023)

The estimated shares of smallholder farmers by revenue in onions in the top 10 markets, illustrated in percentages, are presented in Figure 5. Leading the list of the top 10 markets was Johannesburg at 49% (R54 million), followed by Tshwane at 18% (R19 million), Cape Town at 13% (R14 million), eThekwini at 7% (R7 million), and Ekurhuleni at 3% (R2.8 million). The Mangaung (R2.48 million), Msunduzi (R2.41 million) and Buffalo City (R1.7 million) markets had the same share of 2% while Matlosana (R1.4 million) and Matjhabeng (R1.14 million) market had the lowest share of smallholder farmers in onions at 1% each.

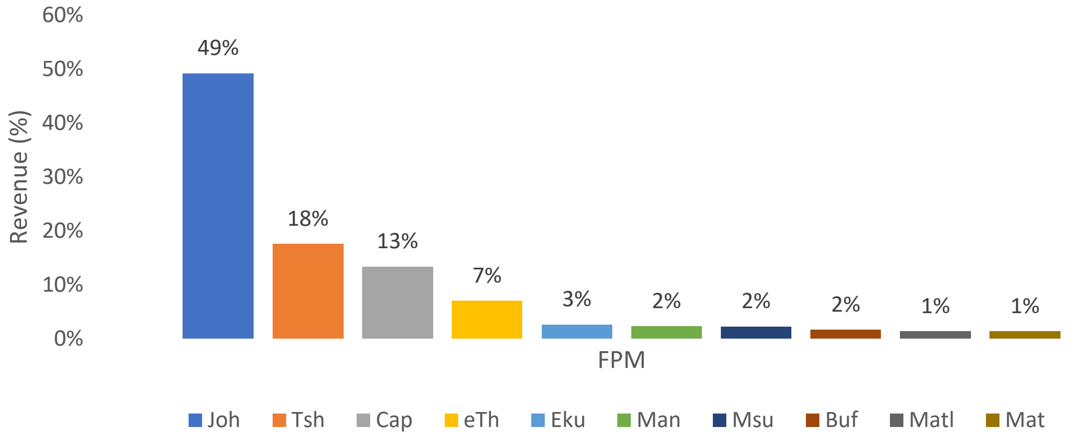


Figure 5: Estimated shares of smallholder farmers by revenue in the top 10 markets for onions in May 2023

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 R37 million in revenue derived from a total mass of 4 393 MT, followed by WC at R7 million (716 MT), KZN at R5 million (568 MT), FS at R3 million (264 MT), EC at R1.89 million (166 MT), NW at R1.27 million (118 MT) and NC at R368 235 (30 MT). The MP province was at R58 058 (7 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 R57 million in revenue derived from a total mass of 6 261 MT.

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

Province	Revenue	Mass
GP	R37 612 249	4 393
WC	R7 494 512	716
KZN	R5 406 776	568
FS	R3 055 098	264
EC	R1 890 741	166
NW	R1 273 298	118
NC	R368 235	30
MP	R58 058	7

Source: SAUFM (2023)

Tomatoes were the fourth largest traded commodity at the NFPMs in May 2023. The Johannesburg Market commanded the largest share of smallholder farmers at 49%, translated as 3 062 MT (see Figure 6). This market was followed by Tshwane at 1 022 MT (16%), Cape Town at 716 MT (11%), eThekwini at 521 MT (8%), Ekurhuleni at 290 MT (5%), with Mangaung (150 MT), Msunduzi (118 MT), and Matlosana (114 MT) each at 2%. The Buffalo City (87 MT) and Matjhabeng (78 MT) markets had the least share of smallholder farmers in tomatoes among the top ten markets at 1% each.

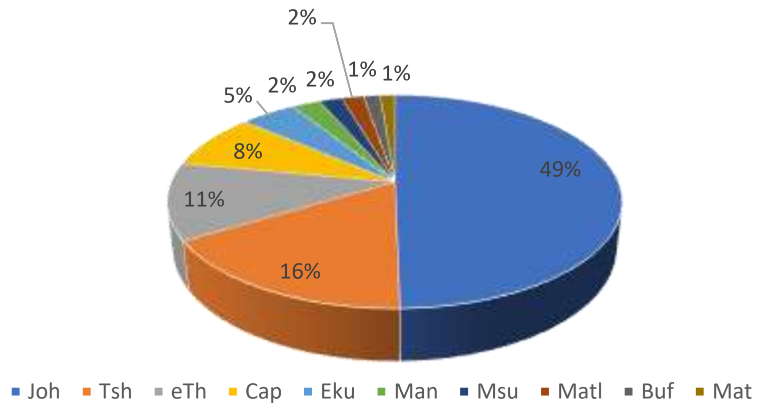


Figure 6: Estimated share of smallholder farmers by mass in the top 10 markets for tomatoes in May 2023

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue in tomatoes for top 10 markets, illustrated in percentages, is presented in Figure 7. Leading the list of the top 10 markets was Johannesburg at 46% (R26 million), Tshwane at 16% (R8 million), Cape Town at 13% (R7 million), eThekwini at 9% (R4 million), and Ekurhuleni at 4% (R2 million). The Mangaung was at 3% (R1.75 million) while Msunduzi (R1.3 million), Buffalo City (R1.2 million), Matlosana (R996 969), and Matjhabeng (R893 969) each had the same share of 2%.

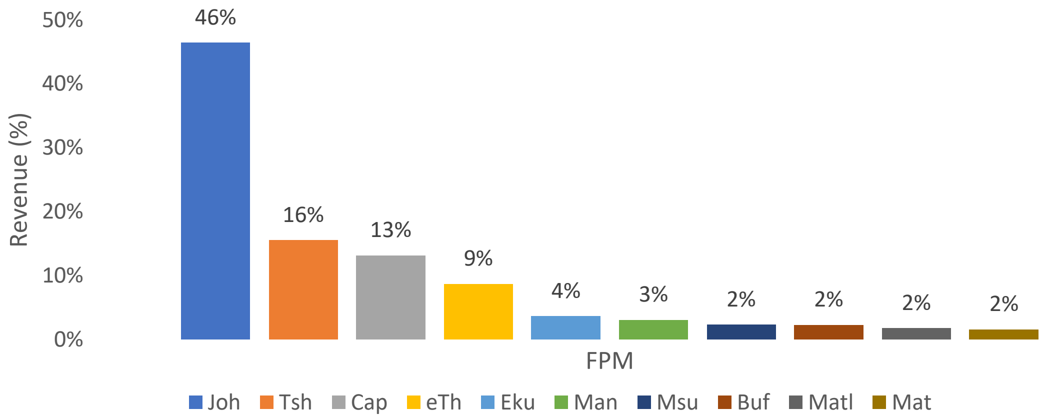


Figure 7: Estimated share of smallholder farmers by revenue in the top 10 markets for tomatoes in May 2023

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 R29 million derived from a total mass of 4 572 MT, followed by WC at R7.8 million (1 225 MT), KZN at R7.6 million (1 015 MT), EC at R4 million (572 MT), FS at R2 million (412 MT) and NW at R1.17 million (139 MT). On the other hand, the MP province was at R265 338 (40 MT) while the NC was at R74 802 (9 MT). The overall estimated smallholder share for bananas was R53 million and 7 983 MT.

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

Province	Revenue	Mass
GP	R29 277 620	4 572
WC	R7 876 791	1 225
KZN	R7 601 789	1 015
EC	R4 455 061	572
FS	R2 950 693	412
NW	R1 174 173	139
MP	R265 338	40
NC	R74 802	9

Source: SAUFM (2023)

Bananas constituted the most traded fruit on the FPM system in May 2023. The Johannesburg Market commanded the largest share of smallholder farmers at 31% (2 496 MT) (see Figure 8). It was followed by Tshwane at 21% (1 689 MT), eThekwini at 13% (1 015 MT), Cape Town at 12% (925 MT), Ekurhuleni at 5% (386 MT) while Mangaung (354 MT), Msunduzi (300 MT), and Matlosana (283 MT) were each at 4%. These markets were followed by Buffalo City at 2% (187 MT). Among the top ten markets, Matjhabeng fresh produce market (139 MT) commanded the least estimated share of smallholder farmers at 2%.

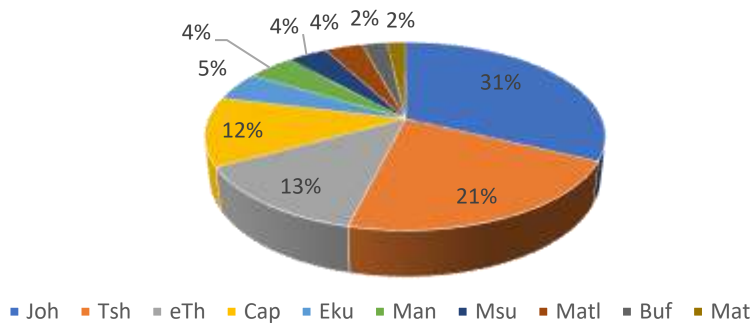


Figure 8: Estimated shares of smallholder farmers by mass in top 10 markets for bananas in May 2023

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue in the top 10 markets for bananas in May 2023, measured in percentages is presented in Figure 9. Leading the list of the top 10 markets was Johannesburg at 31% (R16 million), followed by Tshwane at 20% (R10 million), Cape Town at 15% (R7 million), eThekwini at 11% (R5 million), Ekurhuleni at 5% (R2.8 million) and Mangaung at 4% (R2.0 million). Other markets including Msunduzi (R1.84 million), Buffalo City (R1.82 million) and Matlosana (R1.61 million) were at 3% each. The Matjhabeng (R1.17 million) fresh produce market had the least share at 2%.

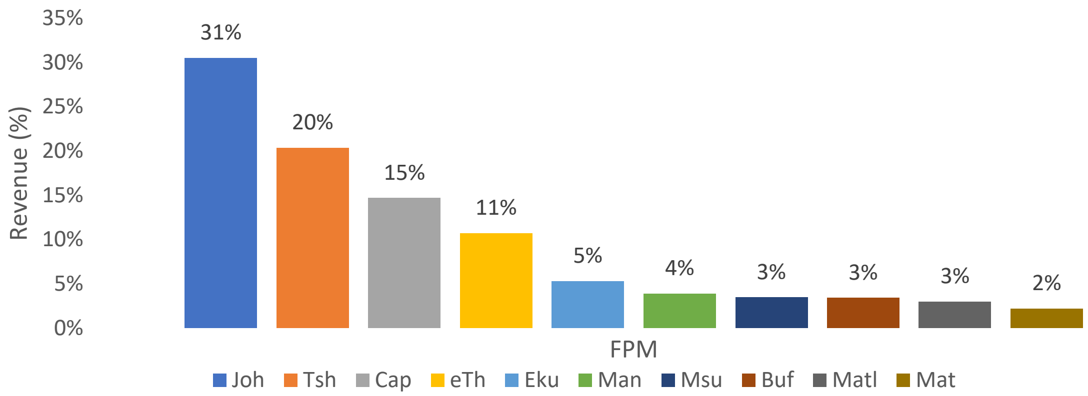


Figure 9: Estimated shares of smallholder farmers by revenue in the top 10 markets for bananas in May 2023

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 during May 2023. The GP province was leading with a revenue of R82 million derived from a total mass of 12 765 MT, followed by WC at R14 million (1 567 MT), KZN at R9 million (1 212 MT), FS at R3.99 million (481 MT), EC at R3.91 million (733 MT), and NW at R1.73 million (307 MT).

The MP province was at R225 108 (47 MT) while NC commanded the lowest estimated share of smallholder farmers in other vegetables at R172 842 (50 MT). The estimated overall revenue share from the sale of other vegetables on the fresh produce markets by smallholder farmers was R117 million matched by 17 161 MT.

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

Province	Revenue	Mass
GP	R82 861 284	12 765
WC	R14 887 752	1 567
KZN	R9 914 750	1 212
FS	R3 990 113	481
EC	R3 910 498	733
NW	R1 730 730	307
MP	R225 108	47
NC	R172 842	50

Source: SAUFM (2023)

Market shares for other vegetables traded in the various fresh produce markets in May 2023 are illustrated in Figure 10. The Johannesburg Market commanded the largest share of smallholder farmers at 49% (8 429 MT) (see Figure 10), followed by Tshwane at 23% (3 913 MT), eThekwini at 9% (1 567 MT), Cape Town at 6% (1 091 MT), and Ekurhuleni at 3% (501 MT), with Mangaung (395 MT) and Msunduzi (307 MT) each at 2%. The Matlosana (244 MT), Buffalo City (237 MT) and Matjhabeng (232 MT) markets commanded the least share of smallholder farmers among the top ten fresh produce markets at 1% each.

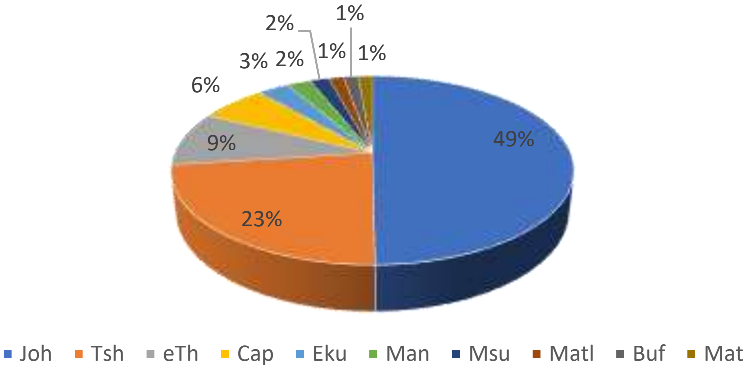


Figure 10: Estimated shares of smallholder farmers by mass in the top 10 markets for other vegetables in May 2023

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue in top 10 markets for other vegetables in May 2023, measured in percentages is presented in Figure 11. Leading the list of the top 10 markets was Johannesburg at 50% (R58 million), Tshwane at 19% (R22 million), Cape Town at 13% (R14 million), and eThekwini at 8% (R9 million). The Ekurhuleni (R2.7 million), Mangaung (R2.2 million), and Msunduzi (R2.0 million) each stood at 2% while Buffalo City (R1.7 million), Matlosana (R1.6 million) and Matjhabeng (R1.2 million) markets had the same share at 1%.

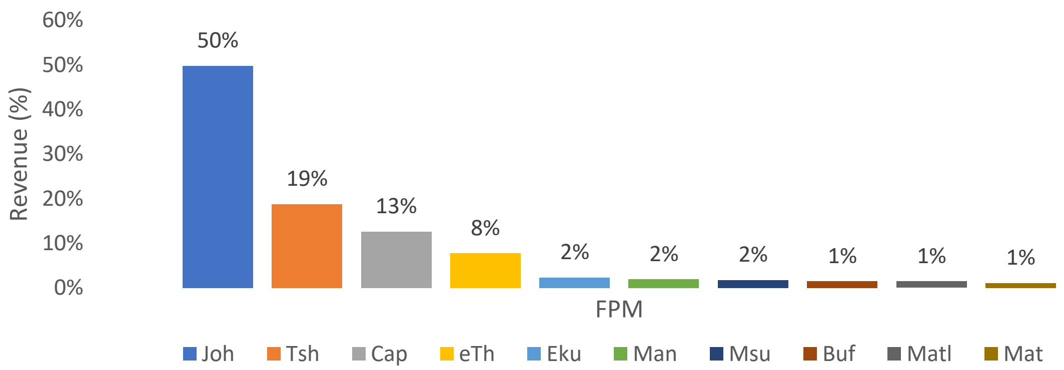


Figure 11: Estimated shares of smallholder farmers by revenue in the top 10 markets for other vegetables in May 2023

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. The GP was the leading province with revenue of R83 million derived from a total mass of 9 823 MT. This was followed by KZN at R13 million (1 909 MT), WC at R12 million (1 239 MT), FS at R4 million (664 MT), EC at R2 million (295 MT), and NW at R1.79 million (269 MT).

The MP had an estimated share of R225 108 (35 MT) while NC stood at R172 842 (31 MT). The overall share of smallholder farmers in other vegetables in May 2023 in value and mass was R117 million and 14 265 MT, respectively.

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

Province	Revenue	Mass
GP	R83 408 048	9 823
KZN	R13 454 192	1 909
WC	R12 085 646	1 239
FS	R4 405 685	664
EC	R2 138 867	295
NW	R1 792 278	269
NC	R225 108	35
MP	R172 842	31

Source: SAUFM (2023)

Market shares for smallholder farmers in other fruits traded in the various fresh produce markets in May 2023 are illustrated in Figure 12. The Johannesburg Market commanded the largest share at 45% (6 396 MT) (see Figure 12), followed by Tshwane at 20% (2 794 MT), eThekwini at 11% (1 546 MT), Cape Town at 9% (1 239 MT), Ekurhuleni at 4% (576 MT), with Mangaung (429 MT) and Msunduzi (363 MT) each at 3%. The Matlosana (269 MT) and Buffalo

City (253 MT) markets commanded the same share at 2%. The Matjhabeng (235 MT) market commanded the lowest share of smallholder farmers among the top ten markets also at 2%.

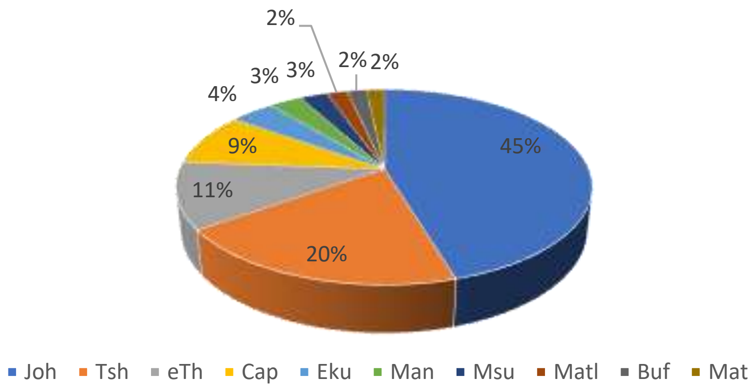


Figure 12: Estimated shares of smallholder farmers by mass in the top 10 markets for other fruits in May 2023

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue in the top 10 markets for other fruits in May 2023, illustrated in percentages, is presented in Figure 13. Leading the list of the top 10 markets was Johannesburg at 49% (R57 million), Tshwane at 19% (R22 million), eThekwini at 10% (R12 million), Cape Town at 10% (R11 million), with Ekurhuleni (R3.5 million) and Mangaung (R3.0 million) each at 3%. Other markets commanding the same share at 2% included Msunduzi (R2.1 million), Buffalo City (R1.93 million) and Matlosana (R1.79 million). The Matjhabeng (R1.39 million) had the least share of revenue for smallholder farmers among the top ten markets at 1%.

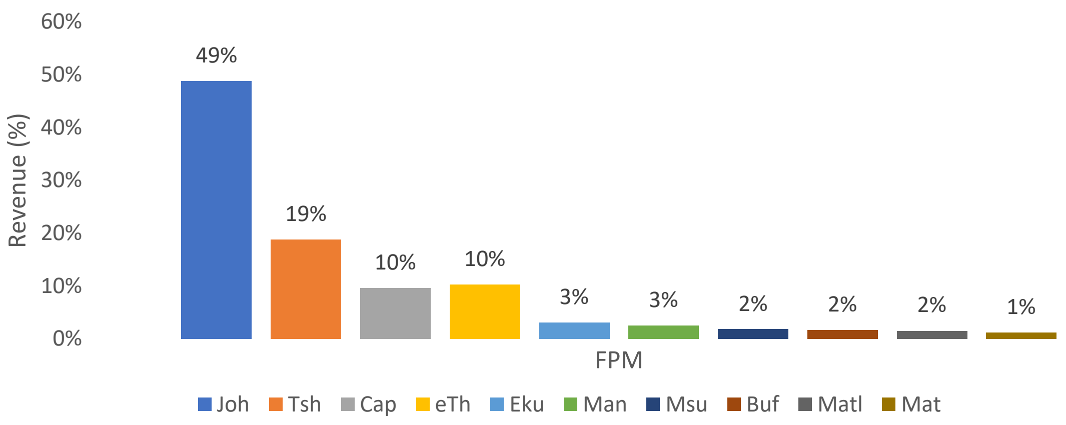
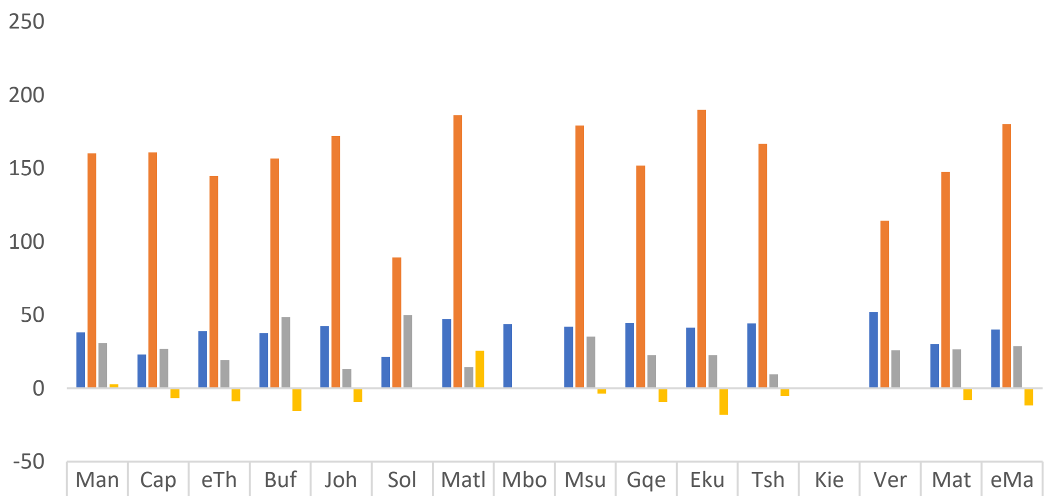


Figure 13: Estimated shares of smallholder farmers by revenue in the top 10 markets for other fruits in May 2023

Source: SAUFM (2023)

3.7 PRICES

Figure 14 depicts price changes measured in percentages for the top four agricultural commodities by fresh produce market, comparing May 2022 and May 2023. Over the study period, potatoes showed significant growth in prices especially in Johannesburg, Matlosana, Mbombela, Msunduzi, Gqeberha, Ekurhuleni, Tshwane, and Vereeniging markets. Prices for onions displayed the greatest upward growth during the period under review and averaged over 100% increase in all the markets. Increases in the prices for tomatoes were moderate across all markets when compared to increases experienced in prices for potatoes and onions during the same period. Finally, prices for bananas by market exhibited a downward trend with more decline observed in Buffalo city, Ekurhuleni and eMalahleni. The increases in the prices for especially potatoes, onions and tomatoes support 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	38	23	39	38	42	21	47	44	42	45	41	44	0	52	30	40
Onions	160	161	145	157	172	89	186	0	179	152	190	167	0	114	148	180
Tomatoes	31	27	19	49	13	50	15	0	35	23	23	10	0	26	27	29
Bananas	3	-7	-9	-15	-9	0	26	0	-4	-9	-18	-5	0	0	-8	-12

Figure 14: Price trends for top four traded agricultural products in May 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 May 2023 the total mass traded at the NFPMs was 265 873 MT, generating a total revenue of R2.06 billion. Thirty percent (smallholder share) of this in mass and revenue was estimated at 79 762 MT and R618 million. A further analysis of this at the provincial level shows that GP was leading at 53 911 MT matched by a revenue of R414 million. This was followed by KZN at 9 297 MT (R71 million), WC at 7 492 MT (R65 million), EC at 3 215 MT (R26 million), FS at 3 663 MT (R25 million), NW at 1 602 MT (R11 million) and MP at 503 MT (R3 million). The NC had the lowest share at 179 MT (R1 million). By top 10 fresh produce markets, the Johannesburg Market commanded the list of the top ten fresh produce markets at 34 770 MT (R278 million), followed by Tshwane at 15 487 MT (R113 million), Cape Town at 7 492 MT (R65 million), eThekwini at 7 711 MT (R61 million), Ekurhuleni at 3 260 MT (R20 million), Buffalo City at 1 956 MT (R15.8 million), Mangaung at 2 207 MT (R15.7 million), Matlosana at 1 602 MT (R11 million), Msunduzi at 1 586 MT (R10.33 million), Gqeberha at 1 260 MT (R10.31

million), and Matjhabeng at 1 455 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 agricultural products (except for bananas) traded in the month of May 2023.

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