SMALLHOLDER MARKET ACCESS ESTIMATES

June 2023

National Agricultural Marketing Council

www.namc.co.za

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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 NFPMs in South Africa during June 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 – JUNE 23

In June 2023 the total mass traded from the NFPMs was 267 195 MT, generating a total revenue of R1.9 billion (see Table 1). This indicates a decline of 1% (3 272 MT) in mass and a 27% (R415 million) growth in revenue compared to the same month during the previous year. The growth in revenue was as expected given the country's high inflation rate during the period under review as well as the accompanying decline in the volume of sales at the fresh produce markets during the same period.

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

Commodity	Revenue (Rands)	Mass (MT)
Total	R1 980 324 319	267 195
Potatoes	R600 942 747	82 504
Onions	R323 989 518	29 843
Tomatoes	R160 277 101	21 377
Bananas	R159 256 580	23 616
Other vegetables	R362 233 272	58 505
Other fruits	R373 625 099	51 350

Source: SAUFM (2023)

Potatoes had a total mass of 82 504 MT, indicating a decrease of 7% compared to the same month in the previous year. Their revenue increase by 49% during the same period to reach R601 million. The total mass for onions decreased by 4% (1 336 MT) to 29 843 MT in June 2023. But the revenue grew by 86.7% (R150 million) to reach R 324 million. Tomatoes had a total mass of 21 377 MT, indicating an increase of 32% (translated as 5 146 MT). This traded mass was matched by a total revenue of R160 million, indicating an 11% decrease. Bananas showed a moderate increase of 4% (872 MT) in mass traded at 23 616 MT, matched by increase of R32 million in revenue to reach R159 million in June 2023. Other vegetables traded in the system recorded an increase of 8% (4 406 MT) in mass at 58 505 MT, matched by an increase of 4% (R14 million) in revenue. The other fruits recorded a decrease of 11% (6 526MT) compared to traded mass of 57 878 MT in June 2022. The revenue of these fruits grew by 13% (R42 million) to reach R373 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 and other vegetables and other 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.

For the entire month of June 2023, the ideal share (30%) of smallholder farmers in terms of mass and revenue was estimated at 80 158 MT and R594 million, respectively. A further analysis of this at the provincial level shows that GP was leading at 54 959 MT (translated as 69%) matched by a revenue of R402 million (interpreted as 68 %) (See Figure 1). This was followed by KZN at 9 247 MT (R70 million), WC at 7 148 MT (R60 million), Free State at 3 399 MT (R22 million), EC at 3 203 MT (R25 million), NW at 1 590 MT (R 10 million) and MP at 437 MT (R3 million). The NC had the lowest mass from smallholder farmers at 177 MT (R1 million).

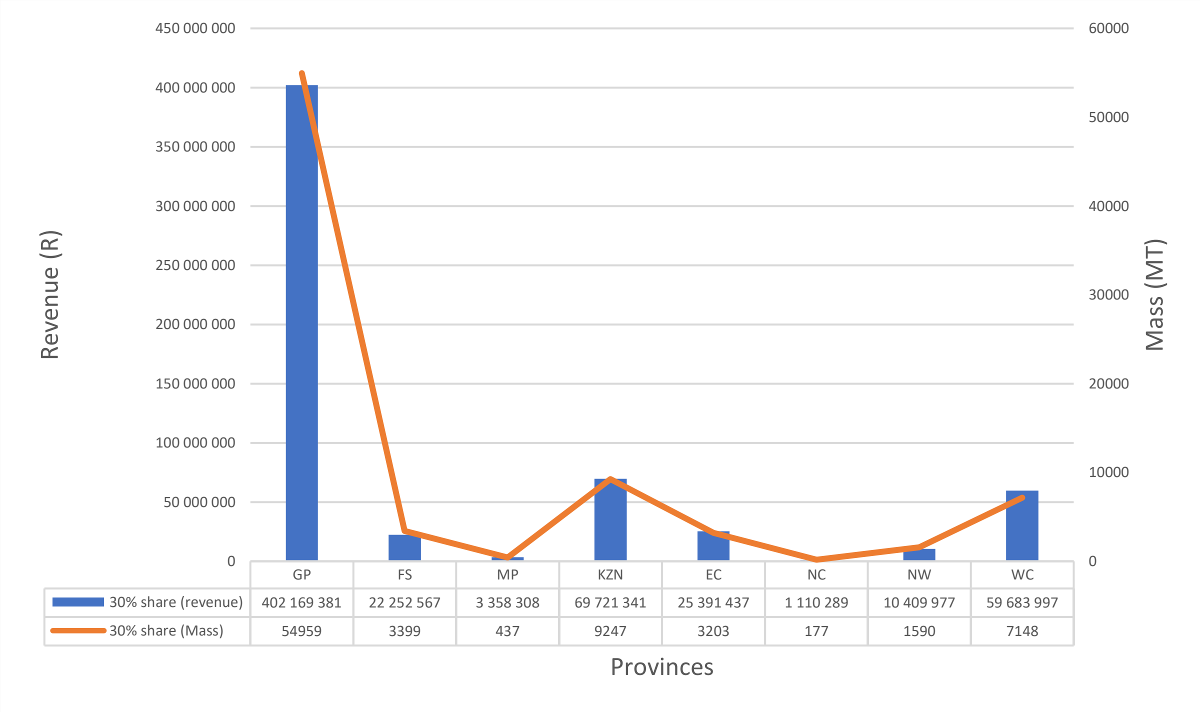


Figure 1: Summary of estimated revenue and mass of smallholder farmers in different provinces, June 2023

Source: SAUFM (2023)

In terms of market analysis, the Johannesburg Market commanded the list of the top ten fresh produce markets at 35 698 MT (R269 million), followed by Tshwane at 15 781 MT (R111 million), Cape Town at 7 148 MT (R59 million), eThekwini at 7 667 MT (R59 million), Ekurhuleni at 3 134 MT (R19 million), Buffalo City at 1 994 MT (R15 million), Mangaung at 2 056 MT (R13 million), Msunduzi at 1 581 MT (R10 million), Matlosana at 1 590 MT (R10 million) and Gqeberha at 1 209 MT (R10 million) (see Table 2). No sales were reported for the Kei Markt during June 2023.

Table 2: Estimated share of smallholder markets by market measured by revenue and mass in June 2023

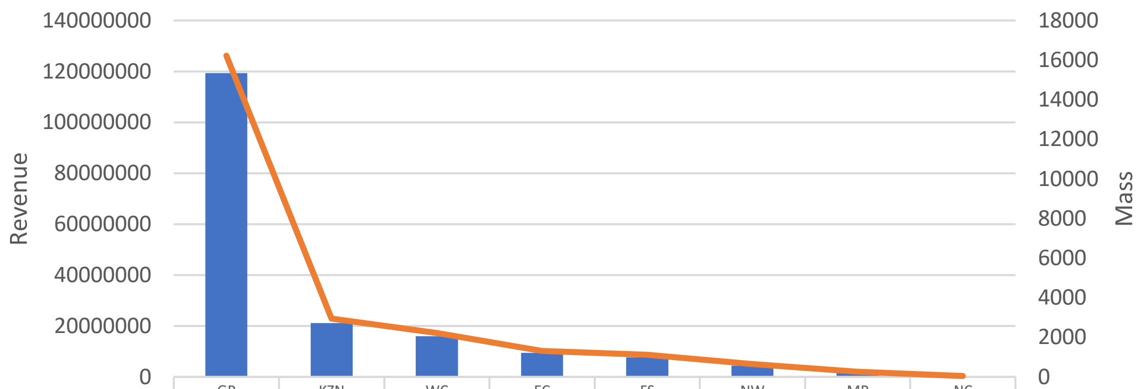
Market	Revenue	Mass (MT)
Johannesburg	R269 056 155	35 698
Tshwane	R111 059 872	15 781
Cape Town	R59 683 997	7 178
eThekwini	R59 059 782	7 667
Ekurhuleni	R19 969 737	3 134
Buffalo City	R15 385 999	1 994
Mangaung	R13 711 853	2 056
Msunduzi	R10 661 559	1 581

Market	Revenue	Mass (MT)
Matlosana	R10 409 977	1 590
Gqeberha	R10 005 438	1 209
Matjhabeng	R8 540 714	1 343
Vereeniging	R2 083 617	346
Emalahleni	R1 939 632	384
Mbombela	R1 418 676	153
Sol Plaatjie	R1 110 289	177
Kei	0	0

Source: SAUFM (2023)

3.1 POTATOES

Potatoes remain the largest traded agricultural product in the fresh produce market system in South Africa. The highest estimated market revenue and mass for smallholder farmers in potatoes was observed in GP at R119 million derived from 16 219 MT (see Figure 2). This was followed by KZN at R21 million (2 944 MT), WC at R16 million (2 216 MT), EC at R9 million (1 303 MT), FS at R8 million (1 123 MT), NW at R4 million (647 MT), and MP at R2 million (256 MT). The least was NC at R285 306 (44 MT). The overall revenue in potatoes was at R180 million (24 751 MT).



	GP	KZN	WC	EC	FS	NW	MP	NC
REVENUE (R)	119327943	21119624	16003588	9391415	7708129	4414443	2032376	285306
MASS (T)	16219	2944	2216	1303	1123	647	256	44

Figure 2: Summary of estimated revenue and mass of smallholder farmers in potatoes at provincial level, June 2023

Source: SAUFM (2023)

Figure 3 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg led at 10 022 MT (40%), followed by Tshwane at 4 693 MT (19%), eThekwini at 2 333 MT (9%) and Cape town at 2 216 MT (9 %). Other markets in the top ten included Ekurhuleni at 1 299 MT (5%), Buffalo City at 790 MT (3%), and Matlosana at 647 MT (3%). Mangaung (615 MT), Msunduzi (611 MT), Gqeberha (513 MT) and Matjhabeng (508 MT) all had 2% market share each.

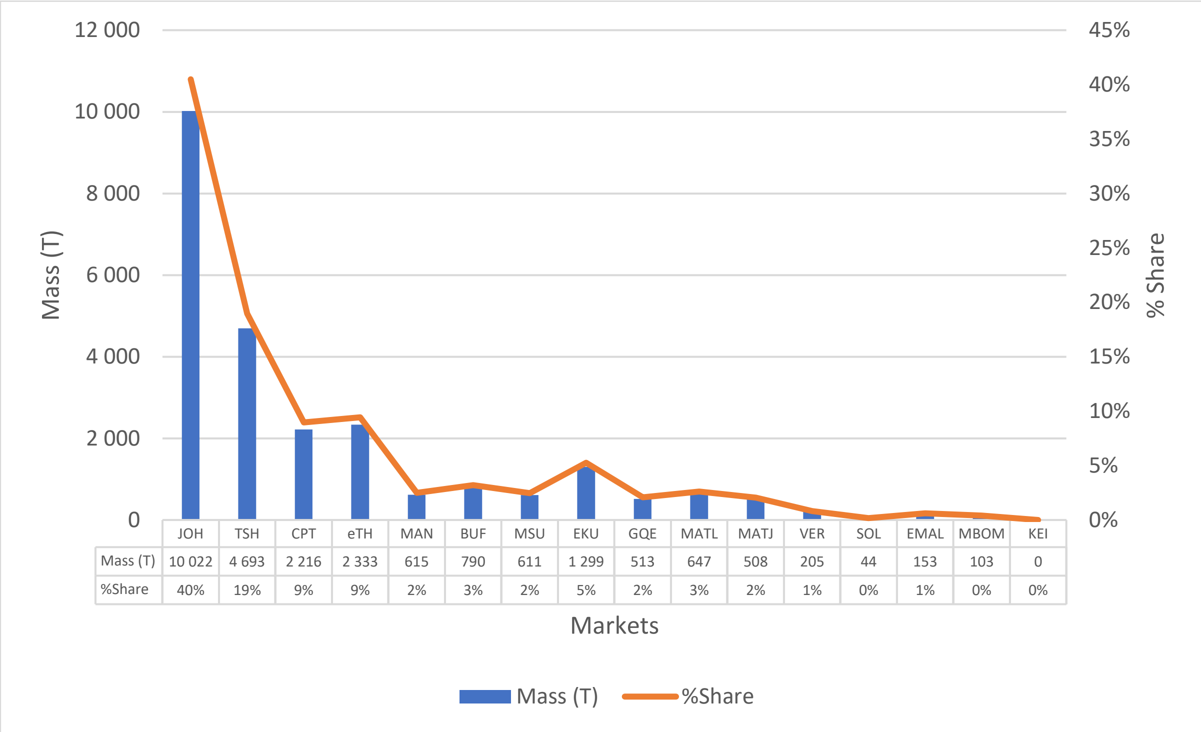


Figure 3: Estimated share in top 10 markets by mass for potatoes, June 2023

Source: SAUFM (2023)

The estimated share by revenue in potatoes for top 10 markets is presented in Figure 4. The Johannesburg led at R73.14 million (41%), followed by Tshwane at R35.63 million (20%), eThekwini at R16.92 million (9%), Cape Town at R16.00 million (9%), Ekurhuleni at R9.12 million (5%) and Buffalo City at R5.72 million (3%). Mangaung at R4.35 million, Msunduzi at R4.20, Gqeberha at R3.67 million, Matlosana at R4.41 million and Matjhabeng at R3.36 million commanded commanded 2% each of share of smallholder farmers in potatoes among the top ten markets.

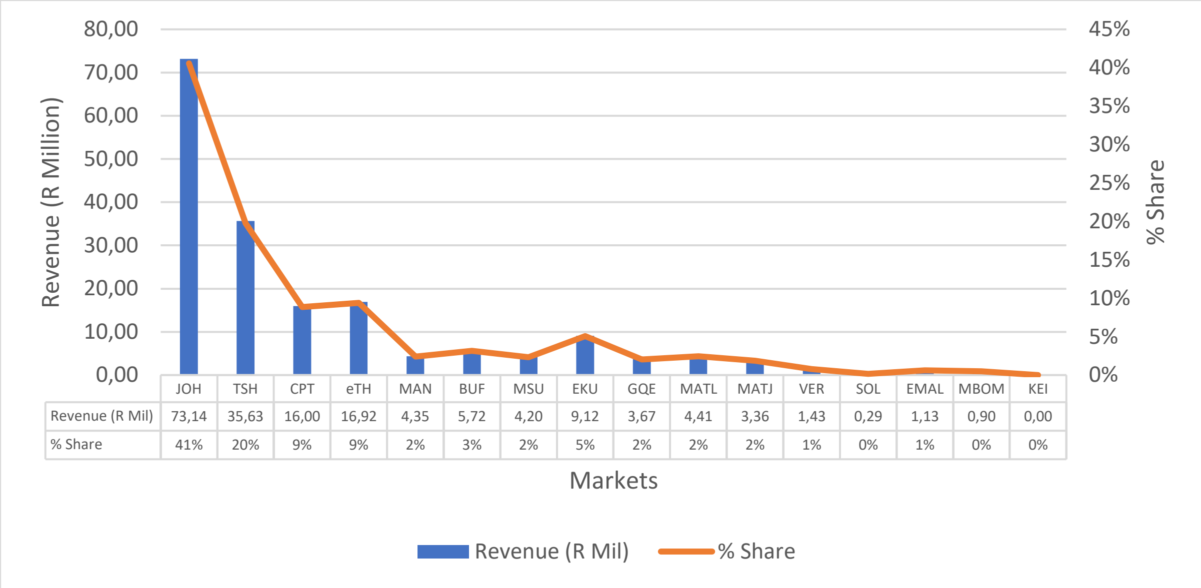


Figure 4: Estimated shares in revenue by top 10 markets for potatoes, June 2023

Source: SAUFM (2023)

3.2 ONIONS

Figure 5 presents onions estimated revenue and mass of smallholder farmers in eight provinces. The GP was the leading province with R65 million in revenue, derived from 6 319 MT in mass, followed by KZN at R15 million (1 203 MT), WC at R8 million (654 MT), EC at R5 million (411 MT), FS at R2.6 million (219 MT), NW at R1 million (101 MT) and MP at R512 119 million (44 MT). The NC at R18 684.00 (2 MT) had the lowest estimated revenue and mass form smallholder farmers in onions. The overall estimated revenue and mass were R97 million and 8 953MT, respectively.

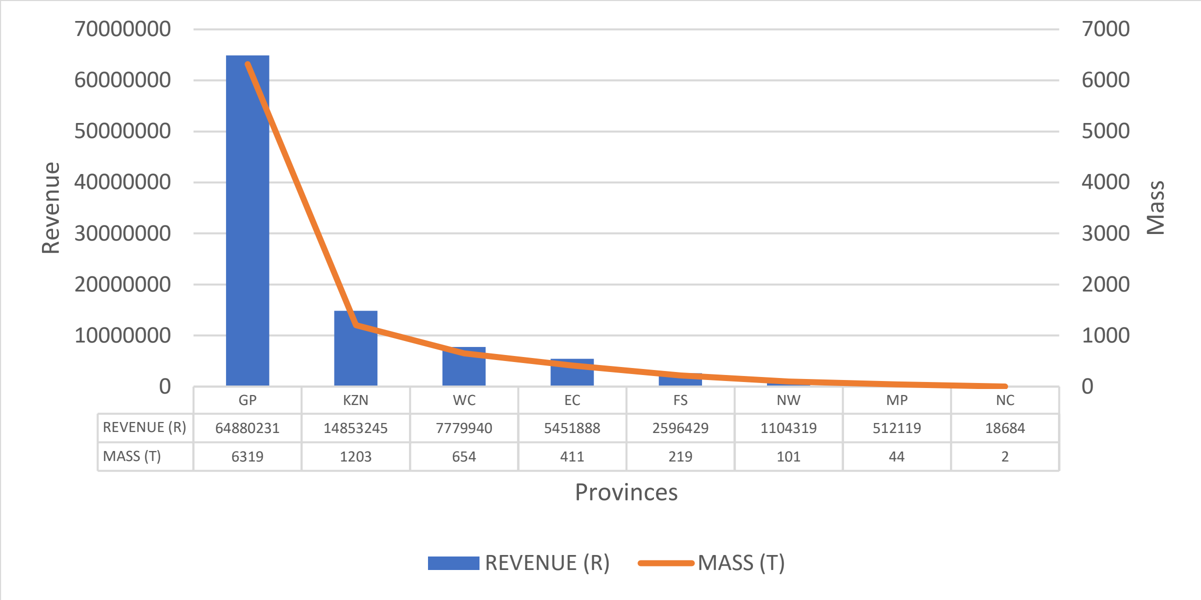
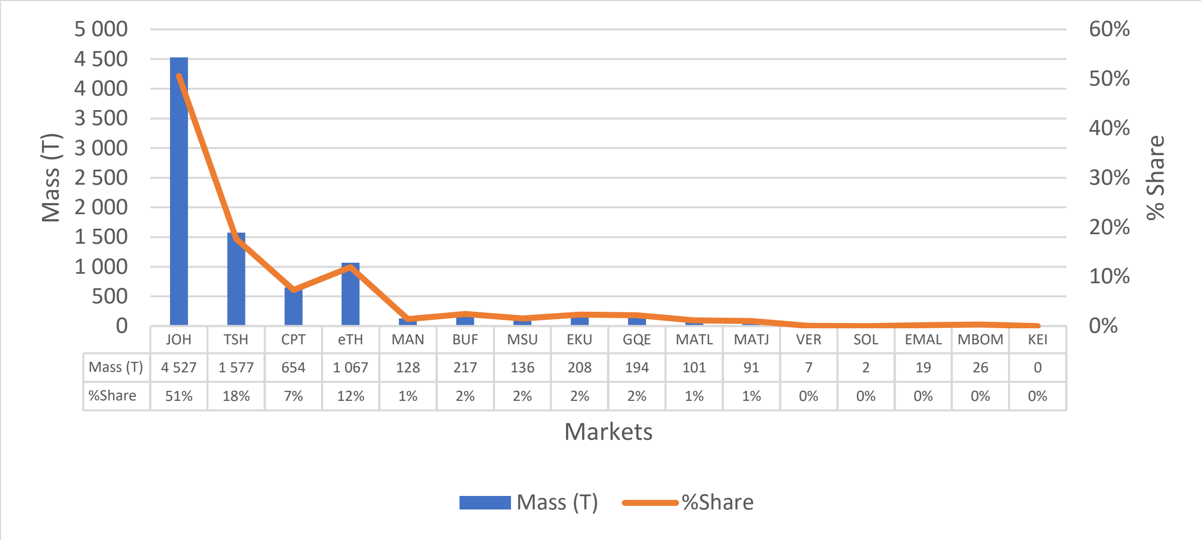


Figure 5: Summary of estimated revenue and mass of smallholder farmers in onions at provincial level, June 2023

Source: SAUFM (2023)

Onions were the second largest traded commodity in fresh produce markets in terms of mass in June 2023. The results presented in Figure 6 show that the Johannesburg market commanded the largest share of smallholder farmers at 4 527 MT (51%). It was followed by Tshwane at 1 755 MT (18%), eThekwini at 1 067 MT (12%), Cape Town at MT 654 (7%). Other markets including Buffalo city (217 MT), Msunduzi (136 MT), Ekurhuleni (208 MT), and Qqeberha (194 MT) were all at 2% each. Mangaung (128 MT), Matlosana (101 MT) and Matjhabeng 91 MT) had the least share of smallholder farmers in onions among the top ten markets at 1% each.

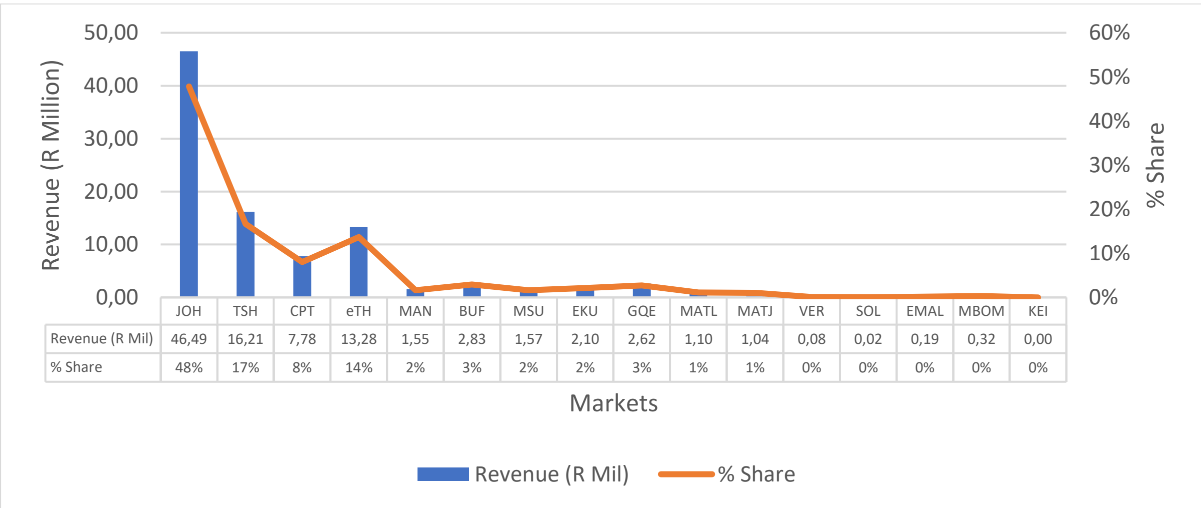


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Mass (T)	4 527	1 577	654	1 067	128	217	136	208	194	101	91	7	2	19	26	0
%Share	51%	18%	7%	12%	1%	2%	2%	2%	2%	1%	1%	0%	0%	0%	0%	0%

Figure 6: Estimated shares in top 10 markets by mass for onions, June 2023

Source: SAUFM (2023)

The estimated share by revenue in onions for top 10 markets is presented in Figure 7. The Johannesburg led at R46.49 million (48%), followed by Tshwane at R16.21 million (17%), eThekwini at R13.28 million (14%), Cape Town at R7.78 million (8%), and Buffalo City (R2.83 million) and Gqeberha (R2.62) both at 3%. Mangaung (R1.55 million), Msunduzi (R1.57 million), and Ekurhuleni (R2.1 million) had the same share at 2% each. Matlosana (R1.1 million) and Matjhabeng (R1.04 million) commanded the least share of smallholder farmers in onions among the top ten at 1% each.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Revenue (R Mil)	46,49	16,21	7,78	13,28	1,55	2,83	1,57	2,10	2,62	1,10	1,04	0,08	0,02	0,19	0,32	0,00
% Share	48%	17%	8%	14%	2%	3%	2%	2%	3%	1%	1%	0%	0%	0%	0%	0%

Figure 7: Estimated shares in revenue by top 10 markets for onions, June 2023

Source: SAUFM (2023)

3.3 TOMATOES

Figure 8 presents the estimated revenue and mass from smallholder farmers in eight provinces of South Africa for tomatoes. GP was the leading province at R32 million in revenue derived from a total mass of 4 484 MT, followed by WC at R6 million (725 MT), KZN at R4 million (563 MT), FS at R2.5 million (296 MT), EC at R1.6 million (170 MT), NW at R1 million (134 MT) and NC at R259 989 (30 MT). MP province was at R82 765 (12 MT), thus making it the lowest contributor to smallholder farmers' share in tomatoes among the top ten markets. Nonetheless, the overall estimated revenue and mass from smallholder farmers in tomatoes was R48 million and 6 413 MT, respectively.

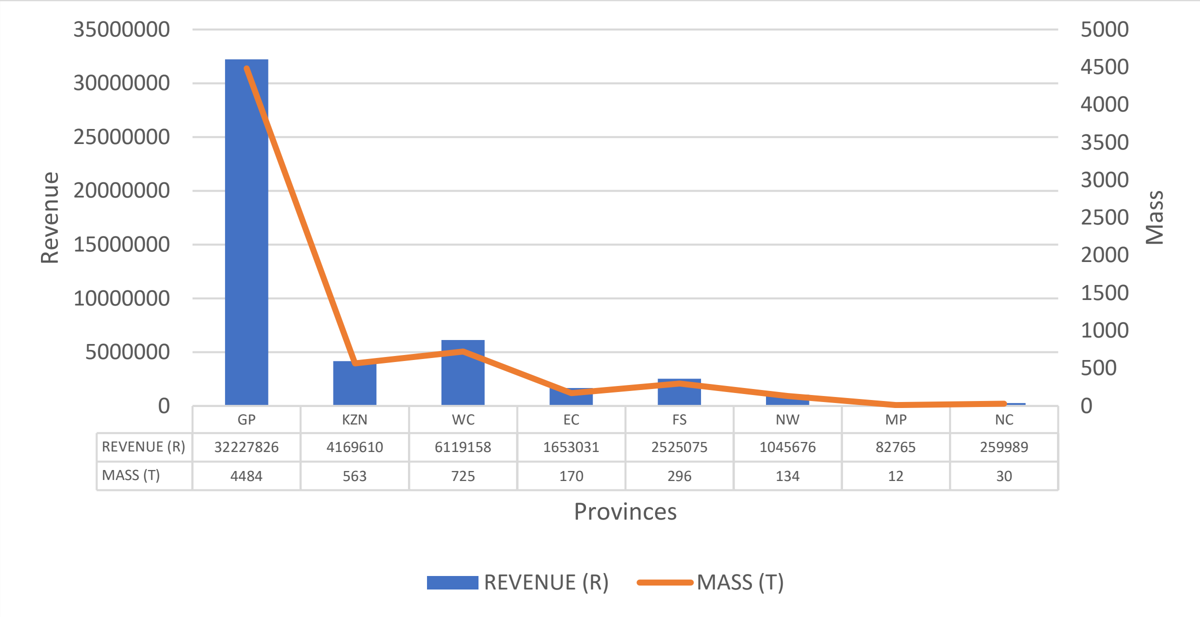


Figure 8: Summary of estimated revenue and mass of smallholder farmers in tomatoes at provincial level, June 2023

Source: SAUFM (2023)

Tomatoes were the second largest traded commodity in terms of mass at fresh produce markets in June 2023. The Johannesburg Market commanded the largest share of smallholder farmers at 49 %, translated as 3 157 MT (see Figure 9). This market was followed by Tshwane at 1 024 MT (16%), Cape Town at 725 MT (11%), eThekwini at 519 MT (8%), Ekurhuleni at 4% (277 MT), Mangaung at 3% (167 MT), and Matlosana (134 MT) and Matjhabeng (129 MT) at

2% each. Other markets among the top ten included Buffalo City (93 MT) and Gqeberha (77 MT) at 1 % each.

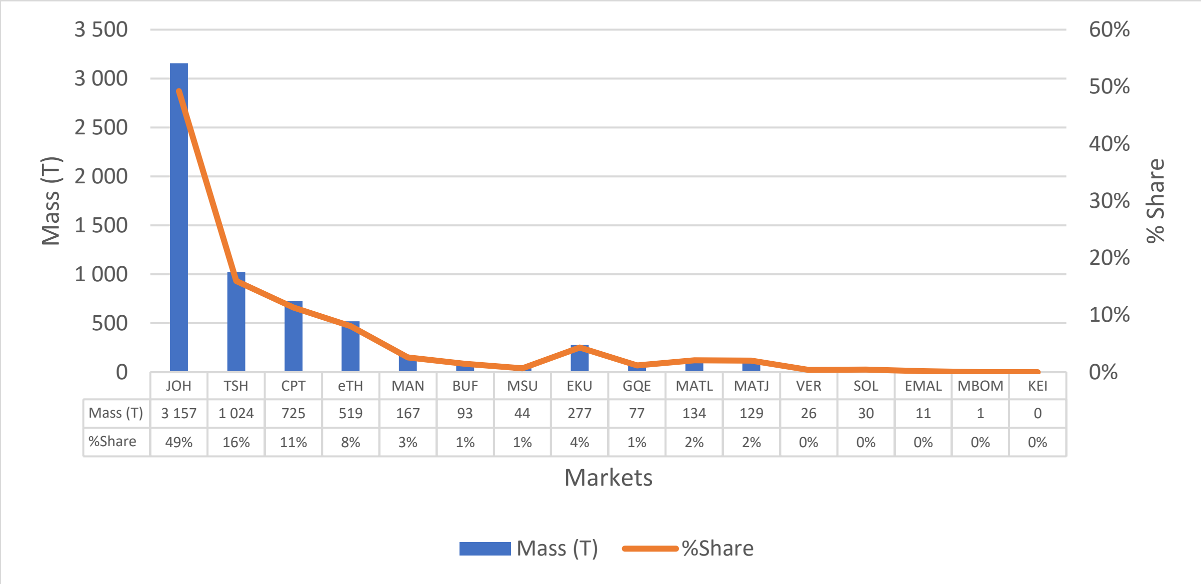
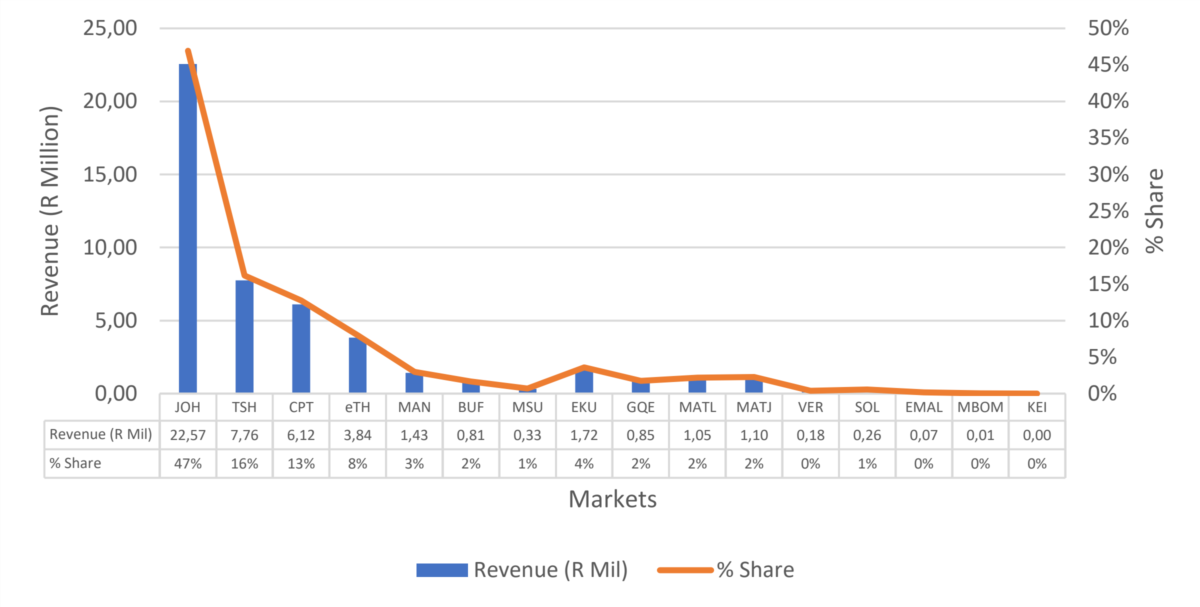


Figure 9: Estimated share in top 10 markets by mass for tomatoes, June 2023

Source: SAUFM (2023)

The estimated share of smallholder farmers by revenue generated from tomatoes for top 10 markets, measured in percentages is presented in Figure 10. Leading the list of the top 10 markets was Johannesburg at 47% (R22.57 million), followed by Tshwane at 16% (R7.76 million), Cape Town at 13% (R6.12 million), eThekwini at 8% (R3.84 million), Ekurhuleni at R1.72 million (4%) and Mangaung at 3% (R1.43 million). Buffalo City (R0.81 million), Gqeberha (R0.85 million), Matlosana (R1.05 million), and Matjhabeng (R1.10 million) all had 2% market share each.



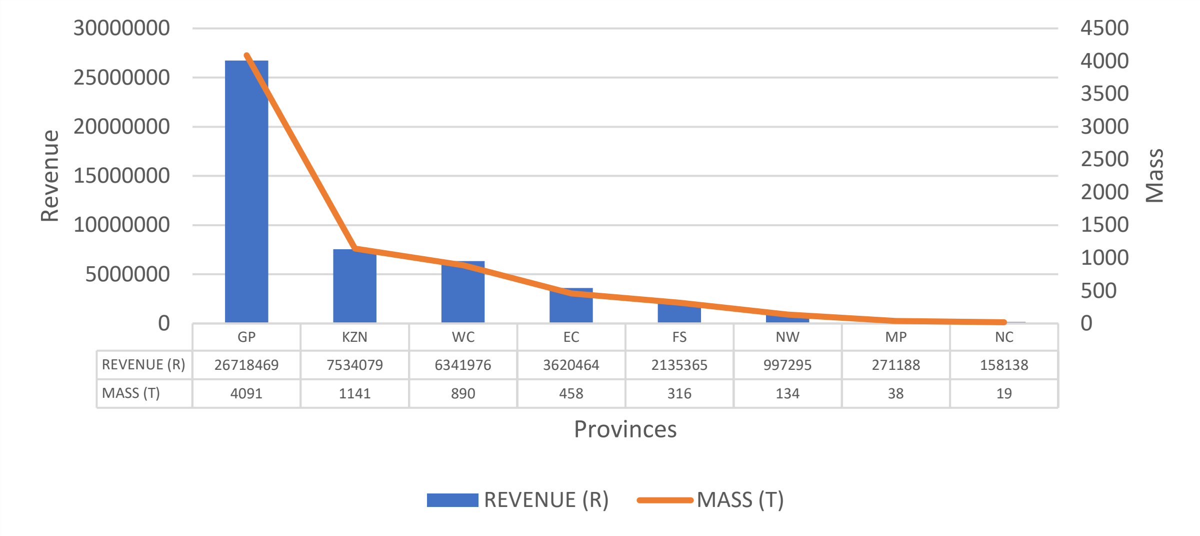
	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Revenue (R Mil)	22,57	7,76	6,12	3,84	1,43	0,81	0,33	1,72	0,85	1,05	1,10	0,18	0,26	0,07	0,01	0,00
% Share	47%	16%	13%	8%	3%	2%	1%	4%	2%	2%	2%	0%	1%	0%	0%	0%

Figure 10: Estimated share in revenue by top 10 markets for tomatoes, June 2023

Source: SAUFM (2023)

3.4 BANANAS

Figure 11 presents the estimated revenue and mass of smallholder farmers in eight provinces of South Africa for bananas. GP was the leading province with R27 million derived from a total mass of 4 091 MT, followed by KZN at R7 million (1 141 MT), WC at R6 million (890 MT), EC at R3.6 million (458 MT), FS at R2 million (316 MT) and NW at R0.99 million (134 MT). The revenue of smallholder farmers for bananas in MP was estimated at R271 188 (38 MT) while NC had the lowest estimated revenue of smallholder farmers in banana at R158 138 (19 MT) over the reported month. The estimated overall smallholder revenue and mass for bananas were R47.77 million and 7 085 MT, respectively.

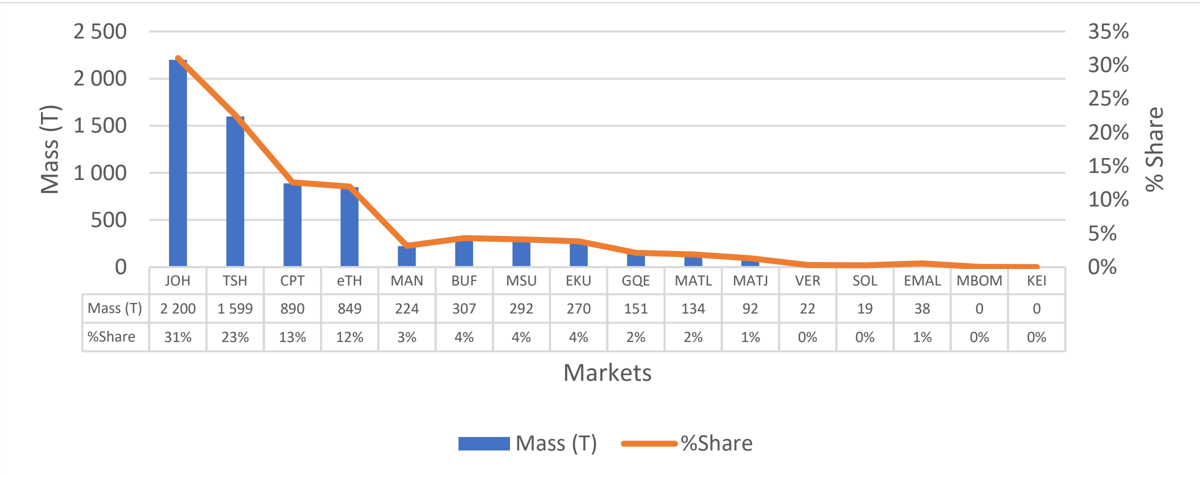


	GP	KZN	WC	EC	FS	NW	MP	NC
REVENUE (R)	26718469	7534079	6341976	3620464	2135365	997295	271188	158138
MASS (T)	4091	1141	890	458	316	134	38	19

Figure 11: Summary of estimated revenue and mass of smallholder farmers in bananas at provincial level, June 2023

Source: SAUFM (2023)

Bananas constituted the most traded fruit on the fresh produce market system in June 2023. By mass, the Johannesburg Market commanded the largest share of smallholder farmers at 31 % (2 200 MT) (see Figure 12). It was followed by Tshwane at 23% (1 599 MT), Cape Town at 13% (890 MT), eThekwini at 12% (849 MT), and Buffalo City (307 MT), Msunduzi (292 MT), and Ekurhuleni (270 MT) were all at 4% each. The Mangaung Market stood at 3% (224 MT) while Gqeberha (151 MT) and Matlosana (134 MT) both stood at 2%.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Mass (T)	2 200	1 599	890	849	224	307	292	270	151	134	92	22	19	38	0	0
%Share	31%	23%	13%	12%	3%	4%	4%	4%	2%	2%	1%	0%	0%	1%	0%	0%

Figure 12: Estimated shares in top 10 markets by mass for bananas, June 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 13. Leading the list of the top 10 markets was Johannesburg at 32% (R15.11 million), followed by Tshwane at 21% (R9.87 million), Cape Town at 13% (R6.34 million), eThekwini at 12% (R5.73 million), Buffalo City at 5% (R2.29 million) and Msunduzi at 4% (R1.80 million). The Ekurhuleni (R1.66 million), Mangaung (R1.49 million) and Gqeberha (R1.33 million) markets were all at 3% each. The Emalahleni Market had the least share of 1% (R0.27 million).

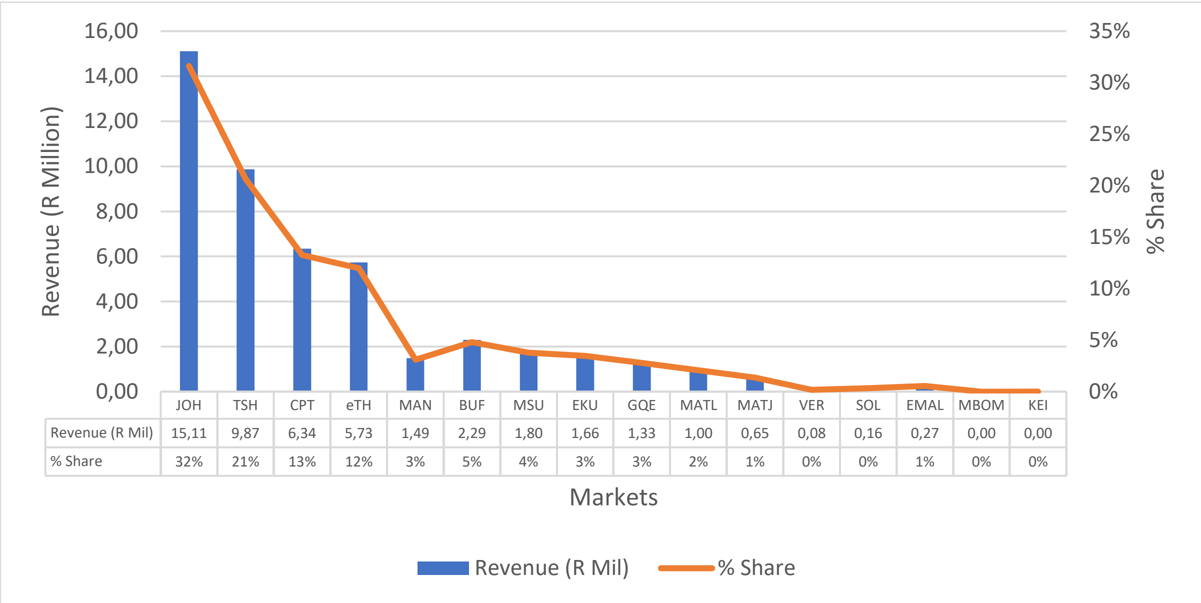


Figure 13: Estimated shares revenue by in top 10 markets for bananas, June 2023

Source: SAUFM (2023)

3.5 OTHER VEGETABLES

Figure 14 presents the other vegetables estimated revenue and mass from smallholder farmers in eight provinces in South Africa. GP was the leading province with revenue of R77 million derived from a total mass of 13 090 MT. This market was followed by WC at R 14 million (1 644 MT), KZN at R8.5million (1 212 MT), FS at R3.4 million (704 MT), EC at R3.3 million (496 MT), and NW at R1.4 million (303 MT). The MP had an estimated revenue of other vegetables at R0.3 million (59 MT) while NC stood at R0.2 million (44 MT). The overall revenue and mass of smallholder farmers in other vegetables in June 2023 was R108 million and 17 552 MT, respectively.

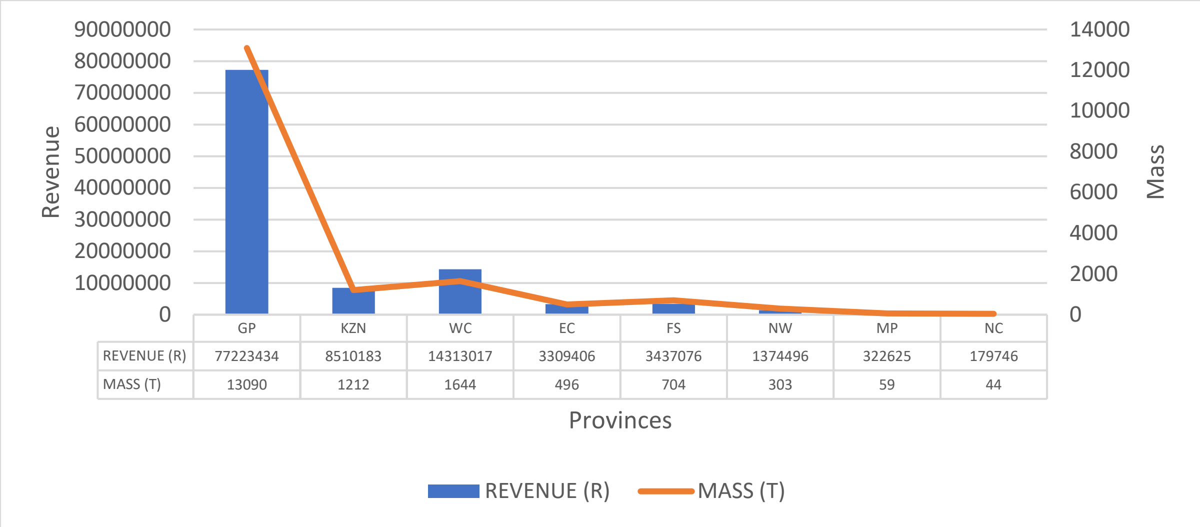


Figure 14: Summary of estimated revenue and mass of smallholder farmers in other vegetables at provincial level, June 2023

Source: SAUFM (2023)

Market shares for smallholder farmers by mass in other vegetables traded in the various fresh produce markets in June 2023 are illustrated in Figure 15. The Johannesburg Market commanded the largest share at 50% (8 692 MT) (see Figure 15), followed by Tshwane at 23% (3 970 MT), Cape Town at 9% (1 644 MT), eThekwini at 6% (1 106 MT) and Mangaung at 3% (484 MT). The Ekurhuleni (419 MT), Matlosana (303 MT) and Buffalo City (281 MT) markets were all at 2% each, while Matjhabeng (220 MT) and Msunduzi stood at 1% each.

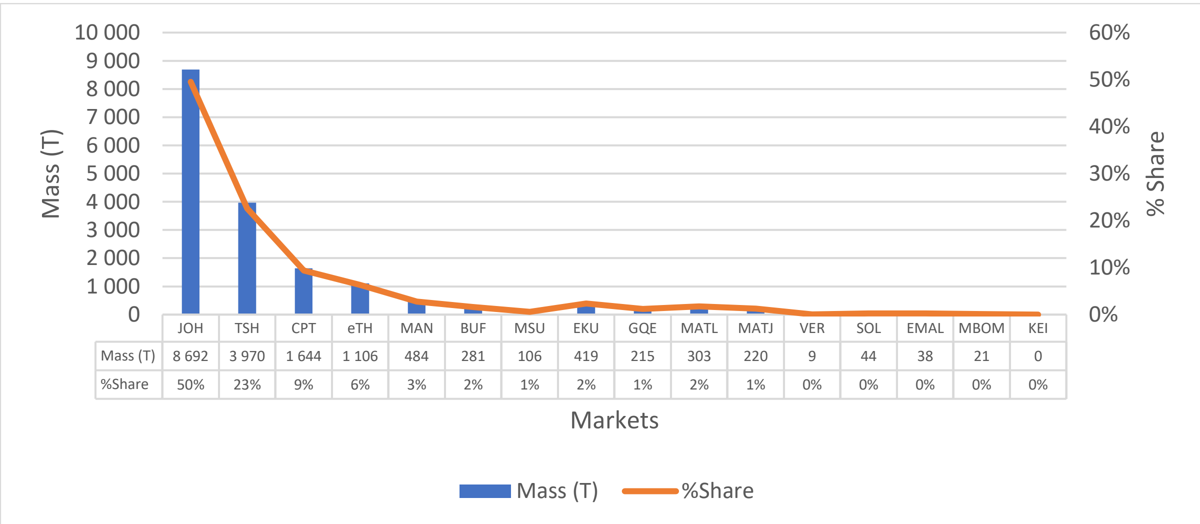
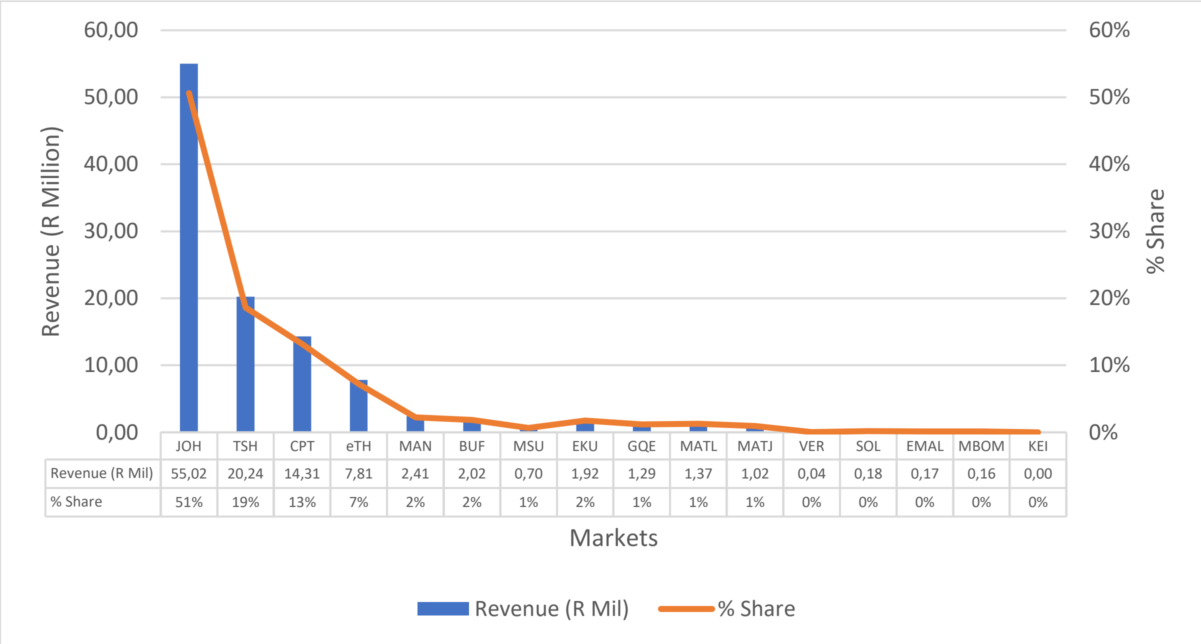


Figure 15: Estimated shares in top 10 markets by mass for other vegetables, June 2023

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 16. Leading the list of the top 10 markets was Johannesburg at 51% (R55 million), followed by Tshwane at 19% (R20 million), Cape Town 13% (R14 million), eThekwini at 7% (R8 million), Mangaung at 2% (R2.4 million), Buffalo City at 2% (R2.02 million), and Ekurhuleni also at 2% (R1.92 million). The Msunduzi (R0.7 million), Gqebegha (R1.29 million), Matlosana (R1.37 million), and Matjhabeng (R1.02 million) markets all stood at 1% each.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Revenue (R Mil)	55,02	20,24	14,31	7,81	2,41	2,02	0,70	1,92	1,29	1,37	1,02	0,04	0,18	0,17	0,16	0,00
% Share	51%	19%	13%	7%	2%	2%	1%	2%	1%	1%	1%	0%	0%	0%	0%	0%

Figure 16: Estimated shares in revenue by markets for other vegetables, June 2023

Source: SAUFM (2023)

3.6 OTHER FRUITS

Figure17 presents the other fruits estimated revenue and mass from smallholder farmers in eight provinces of South Africa during June 2023. GP province was leading with a revenue of R81 million derived from a total mass of 10 757 MT, followed by KZN at R13 million (2 183 MT), WC at R9 million (1 020 MT), FS at R3.8 million (741 MT), EC at R1.9 million (365MT) and NW at R1.5 million (272 MT). The NC province had R0.2 million (39 MT) while MP had the lowest estimated revenue from smallholder farmers in other fruits at R0.1 million (28 MT).

The estimated overall revenue from the sale of other fruits on the fresh produce markets by smallholder farmers was R112 million matched by a volume of 15 405 MT.

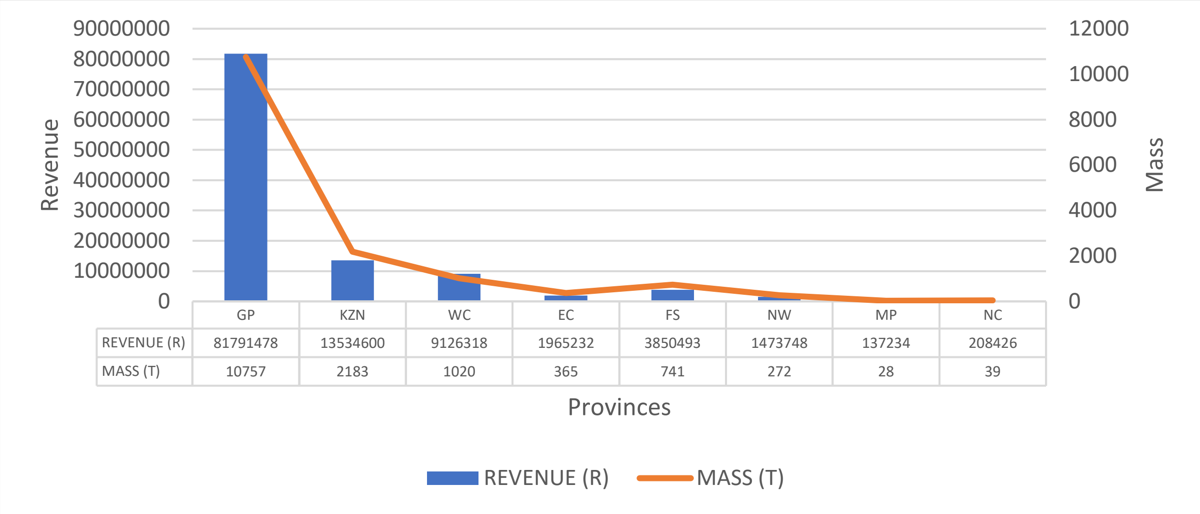


Figure 17: Summary of estimated revenue and mass of smallholder farmers in other fruits at provincial level, June 2023

Source: SAUFM (2023)

Market shares by mass for other fruits traded in the various fresh produce markets in are illustrated in Figure 18. The Johannesburg Market commanded the largest share of smallholder farmers at 46% (7 100 MT) (see Figure 18), followed by Tshwane at 19% (2 981 MT), eThekwini at 12% (1 792 MT), Cape Town at 7% (1 020 MT), Ekurhuleni at 4% (661 MT) and Mangaung (438 MT) and Msunduzi (391 MT) both at 3%. Buffalo City (305 MT), Matlosana (272 MT), and Matjhabeng (303 MT) markets commanded all commanded 2% market share each.

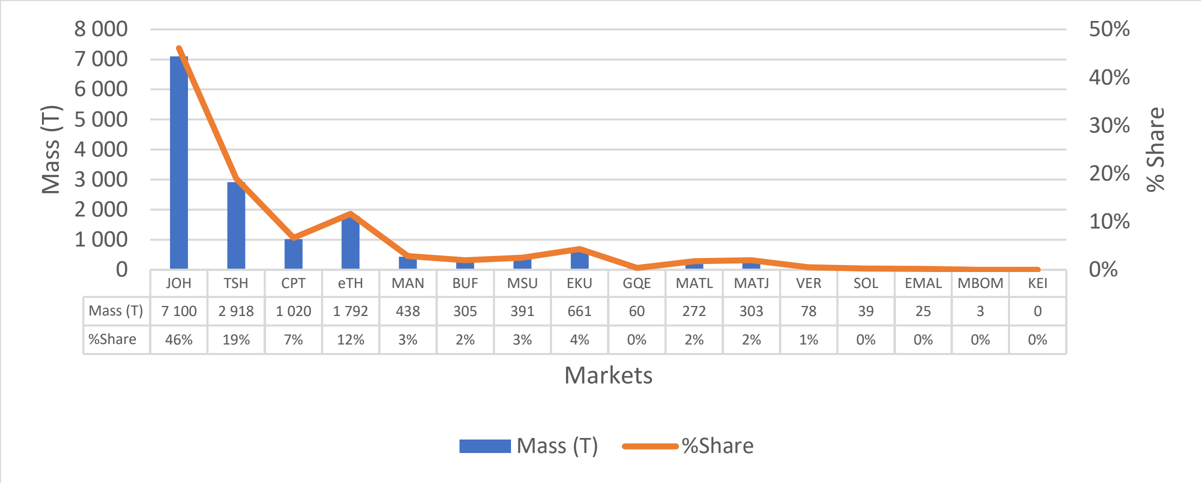


Figure 18: Estimated shares in top 10 markets by mass for other fruits, June 2023

Source: SAUFM (2023)

The estimated share by revenue in other vegetables for top 10 markets, measured in percentages is presented in Figure 19. Leading the list of the top 10 markets was Johannesburg at 51% (R56.73 million), Tshwane at 19% (R21.34 million), eThekwini at 10% (R11.48 million), Cape Town at 8% (R9.13 million), and Ekurhuleni at 3% (R3.44 million). Mangaung (R2.49 million), Buffalo City (R1.72 million), and Msunduzi (R2.05 million) markets were all at 2% each, while Matlosana (R1.47 million) and Matjhabeng (R1.37 million) stood at 1% each.

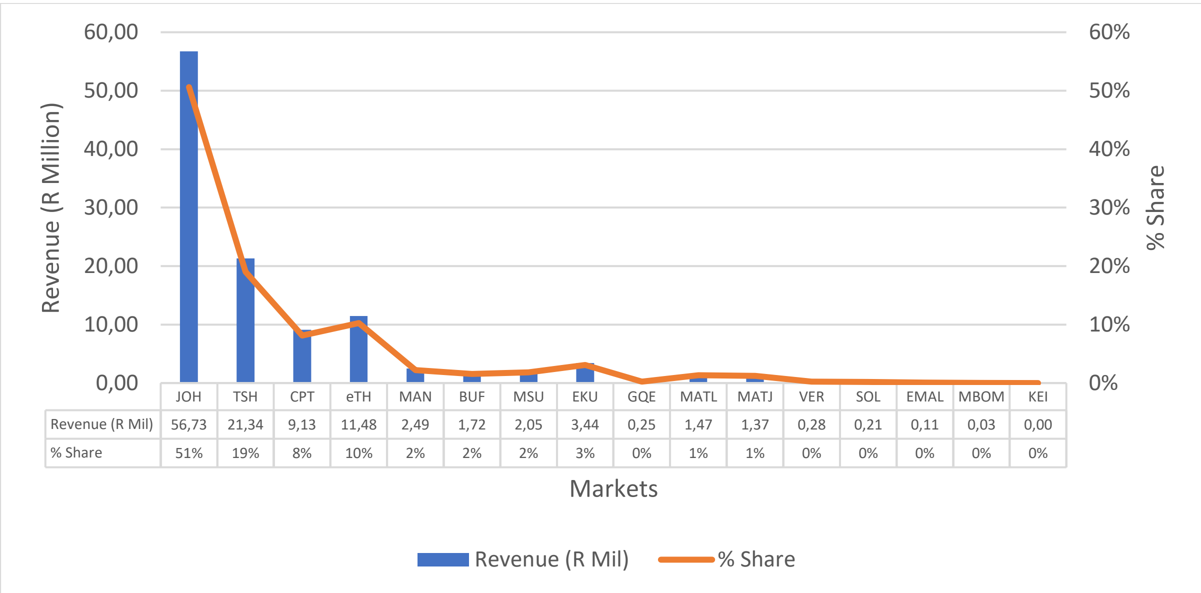
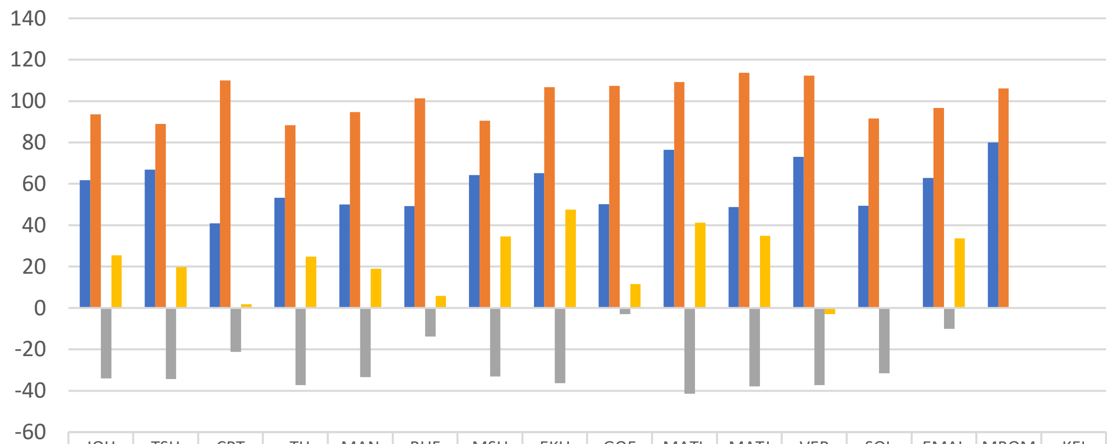


Figure 19: Estimated shares in revenue by top 10 markets for other fruits, June 2023

Source: SAUFM (2023)

3.7 PRICES

Figure 20 illustrates price changes measured in percentages for the top four agricultural commodities by fresh produce market, comparing June 2022 and June 2023. Over the study period, potatoes showed significant growth in prices especially in Mbombela, Matlosana, Vereeniging, Tshwane, Ekurhuleni, Msunduzi, Emalahleni and Johannesburg markets. Prices for onions displayed the greatest upward growth during the period under review and averaged at 95% increase in all the markets. Prices for tomatoes decreased in all the markets during the period under review and the decreases averaged 32%. Finally, prices for bananas by market exhibited a moderate upward trend during the period under review, with a decline of 3% observed in the Vereeniging Market. The increases in the prices for especially potatoes, onions and bananas 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. The declines in the prices for tomatoes across all the markets during the period under review followed an increase of 32% in the total tomatoes traded at the national fresh produce markets during the same period.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Potatoes	62	67	41	53	50	49	64	65	50	76	49	73	49	63	80	0
Onions	94	89	110	88	95	101	91	107	107	109	114	112	92	97	106	0
Tomatoes	-34	-34	-21	-37	-33	-14	-33	-36	-3	-42	-38	-37	-32	-10	0	0
Bananas	25	20	2	25	19	6	35	48	11	41	35	-3	0	34	0	0

Figure 20: Price trends for top four traded agricultural products in June 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. In June 2023 the total mass traded from the NFPMs was 267 195 MT, generating a total revenue of R1.9 billion. This indicates a decline of 1% (3 272 MT) in mass traded and a 27% (R415 million) growth in revenue compared to the same month during the previous year. the ideal share (30%) of smallholder farmers in terms of mass and revenue was estimated at 80 158 MT and R594 million, respectively. A further analysis of this at the provincial level shows that GP was leading at 54 959 MT (translated as 69%) matched by a revenue of R402 million (interpreted as 68 %) . This was followed by KZN at 9 247 MT (R70 million), WC at 7 148 MT (R60 million), Free State at 3 399 MT (R22 million), EC at 3 203 MT (R25 million), NW at 1 590 MT (R 10 million) and MP at 437 MT (R3 million). The NC had the lowest share from smallholder farmers at 177 MT (R1 million).

In terms of market analysis, the Johannesburg Market commanded the list of the top ten fresh produce markets at 35 698 MT (R269 million), followed by Tshwane at 15 781 MT (R111 million), Cape Town at 7 148 MT (R59 million), eThekwini at 7 667 MT (R59 million), Ekurhuleni at 3 134 MT (R19 million), Buffalo City at 1 994 MT (R15 million), Mangaung at 2 056 MT (R13 million), Msunduzi at 1 581 MT (R10 million), Matlosana at 1 590 MT (R10 million) and Gqeberha at 1 209 MT (R10 million). No sales were reported for the Kei Markt during June 2023.

By type of agricultural product, potatoes commanded the largest share of produce sold, followed by onions, tomatoes and bananas. The price of potatoes and onions measured by R per ton increased across all fresh produce markets over the period of study. Prices for tomatoes declined sharply during the period under review. Prices for potatoes showed significant growth especially in Mbombela, Matlosana, Vereeniging, Tshwane, Ekurhuleni, Msunduzi, Emalahleni and Johannesburg markets. Prices for onions displayed the greatest upward growth during the period under review and averaged at 95% increase in all the markets. Prices for tomatoes decreased in all the markets during the period under review and the decreases averaged 32%. Finally, prices for bananas by market exhibited a moderate upward trend during the period under review, with a decline of 3% observed in the Vereeniging Market.

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