NAMC

Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

July 2023

National Agricultural Marketing Council

www.namc.co.za

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

ABBREVIATIONS

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

- 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 Market (NFPM) in South Africa during July 2023. This performance is estimated based on a recommendation of the NAMC's Section 7 committee report on fresh produce markets. The recommendation states that starting from the year 2014 "30% of the volume traded in fresh produce markets should be through black commission market agents". The report covers 16 fresh produce markets across eight provinces in South Africa namely; Gauteng, Free State, Western Cape, Eastern Cape, KwaZulu Natal, North West, Northen Cape and Mpumalanga. The analysis is limited to potatoes, onions, tomatoes, bananas and other vegetables & fruits traded in the system. This limitation arises from the fact that these four commodities represent 60% of the total mass traded and 62% of the value. Monthly data for these commodities were obtained from the South African Union of Food Markets (SAUFM).

2. OVERVIEW OF THE MONTH – JULY 23

Table 1 presents a summary of the revenue and mass for selected fruit and vegetable markets in South Africa. In July 2023 the total mass traded from the NFPMs was 257 043 MT, generating a total revenue of R2 billion. This indicates a decline of 4.9% (13 445 MT) in mass and a 26 % (R424 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: Total Mass and Revenue of selected fruits and vegetables July 2023

Commodity	Revenue (Rands)	Mass (MT)
Total	R2 011 153 204	257 043
Potatoes	R600 942 747	80 227
Onions	R273 186 275	31 949
Tomatoes	R177 482 705	19 946
Bananas	R160 822 097	22 880
Other vegetables	R397 542 462	55 443
Other fruits	R364 873 500	46 598

Source: SAUFM (2023)

The total mass of potatoes amounted to 80 227 MT, signifying a 9% decrease when compared to the same month in the previous year. Additionally, the revenue was recorded at R637 million, indicating a substantial 60% increase compared to the same period last year. While the total mass for onions increased by 2% (724 MT) to 31 949 MT in July 2023. However, the revenue increased by 53.8 % (R150 million) reaching R 273 million. On the other hand, tomatoes had a total mass of 19 946 MT, indicating an increase of 11% (2 012 MT). This traded mass was matched by a total revenue of R177 million, indicating a 2% increase. Bananas reported a decrease of 6% (1 529 MT) in mass traded at 22 880 MT, matched by increase of R26 million in revenue to reach R160 million in July 2023. While other vegetables traded in the system recorded an increase of 2% (1 284 MT) in mass at 55 443 MT, matched by an increase of 6% (R22.5 million) in revenue. The other fruits recorded a decrease of 15% (8 151 MT) compared to traded mass of 46 598 MT in July 2023. The revenue of these fruits increased by 11% (R36.6 million) to reach R365 million over the reported period.

3. ESTIMATED SHARE OF SMALLHOLDER FARMERS

Figure 1 represents a summary of the estimated revenue and mass generated by smallholder farmers from various provinces. For the month of July 2023, the ideal share of smallholder farmers in terms of mass and revenue was estimated at 77 113 MT and R603 million, respectively. Further analysis at the provincial level shows that GP was leading at 52 623 MT (68%) matched by a revenue of R407 million (68 %). This was followed by KZN at 9 046 MT (R69 million), WC at 7 006 MT (R63 million), Free State at 3 285 MT (R23.5 million), EC at 3 070 MT (R25 million), NW at 1 451 MT (R10 million) and MP at 455 MT (R3.5 million). The NC had the lowest mass from smallholder farmers at 177 MT (R1 million).

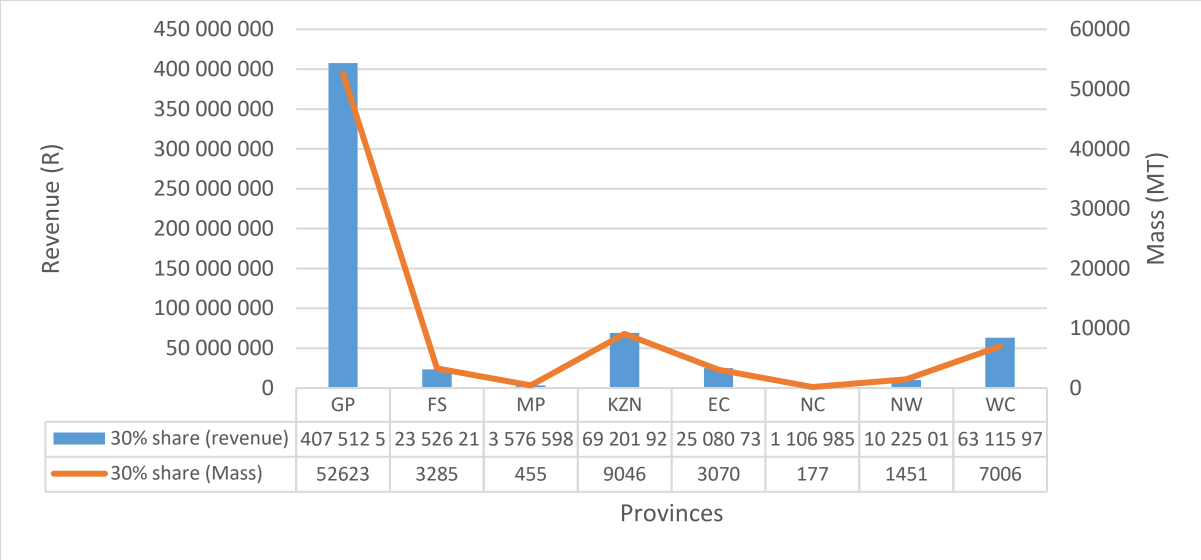


Figure 1: Summary of estimated revenue and mass of smallholder farmers in different provinces, July 2023

Source: SAUFM (2023)

Table 2 presents the estimated distribution of smallholder producer's deliveries to markets based on revenue and mass for July 2023. The Johannesburg market led with a volume of 34 456 MT (revenue of R277 million), followed by Tshwane with 15 122 MT (R109 million), Cape Town with 7 006 MT (R63 million), eThekwini with 7 547 MT (R58 million), Ekurhuleni with 2 816 MT (R19 million), Buffalo City with 1 906 MT (R15.5 million), Mangaung with 2 008 MT (R14.5 million), Msunduzi with 1 499 MT (R10.7 million), Matlosana with 1 451 MT (R10 million), and Gqeberha with 1 164 MT (R10 million). No sales were reported for the Kei Market during July 2023.

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

Market	Revenue (Rand)	Mass (MT)
Johannesburg	R277 348 618	34 456
Tshwane	R109 043 744	15 122
Cape Town	R631 159 76	7006
eThekwini	R58 451 365	7 547
Ekurhuleni	R19 571 162	2 816
Buffalo City	R15 558 065	1906
Mangaung	R14 539 414	2008
Msunduzi	R10 750 555	1 499
Matlosana	R10 225 013	1 451
Gqeberha	R9 522 672	1 164

Market	Revenue (Rand)	Mass (MT)
Matjhabeng	R8 986 797	1 277
Vereeniging	R1 548 999	230
Emalahleni	R1 897 900	267
Mbombela	R1 678 697	188
Sol Plaatjie	R1 106 985	177
Kei	0	0

Source: SAUFM (2023)

3.1 POTATOES

Figure 2 provides an overview of the estimated revenue and mass for smallholder farmers cultivating potatoes, categorized by province. The highest estimated market revenue and mass for smallholder farmers in potatoes was observed in GP at R127 million derived from 15 834 MT. This was followed by KZN at R23 million (2 893 MT), WC at R16 million (2 132 MT), EC at R10 million (1 290 MT), FS at R8 million (1 074 MT), NW at R4 million (543 MT), and MP at R2 million (266 MT). The least was NC at R273 198 (36 MT). The overall revenue generated in potatoes was at R191 million (24 068 MT).

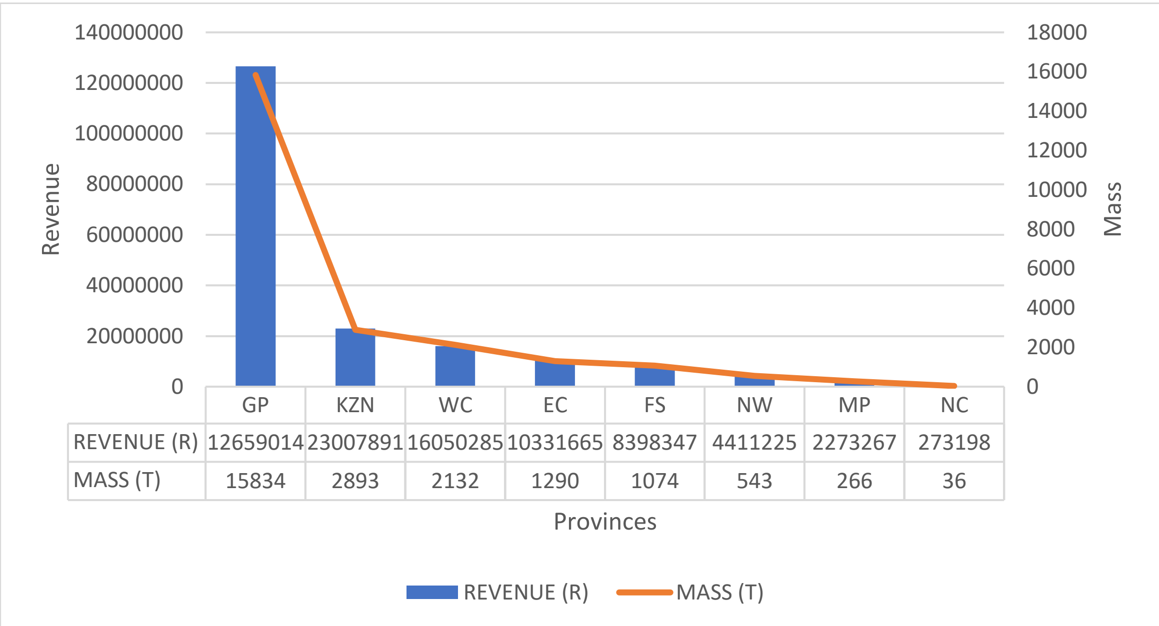
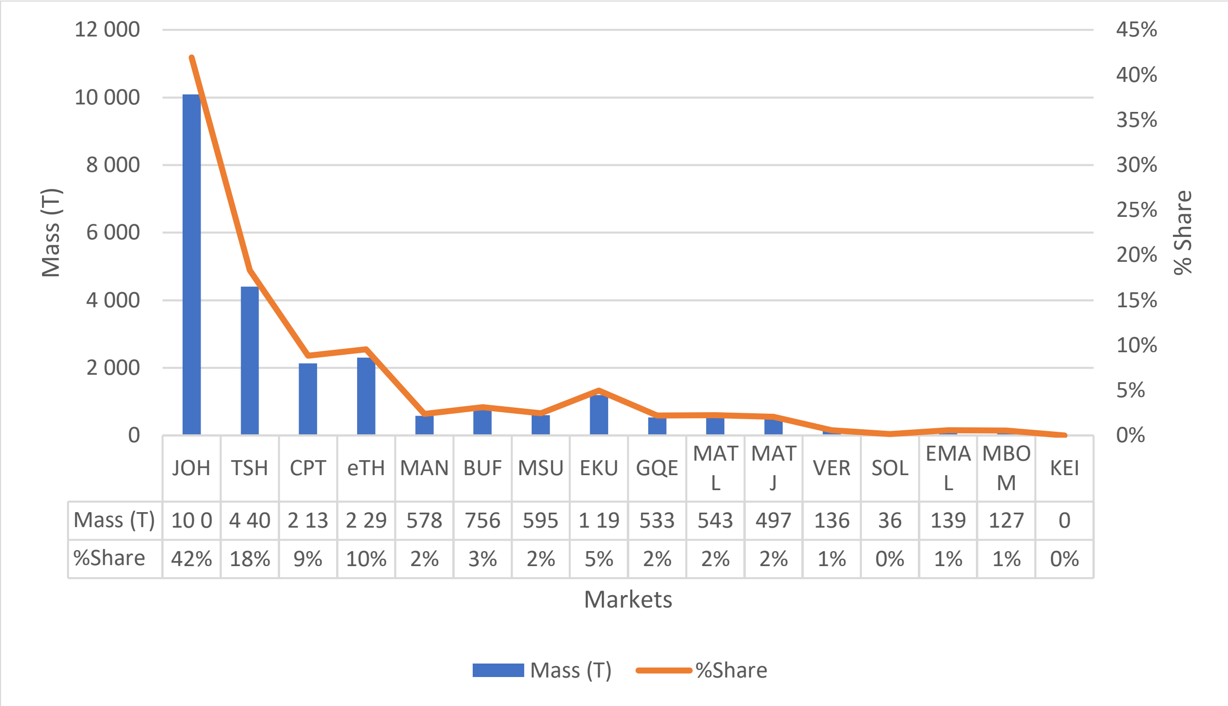


Figure 2: Summary of estimated revenue and mass of smallholder farmers in potatoes at provincial level, July 2023

Source: SAUFM (2023)

Figure 3 shows the potatoes estimated share of smallholder farmers in the top 10 markets. Johannesburg market led at 10 093 MT (42%), followed by Tshwane at 4 407 MT (18%), eThekwini at 2 298 MT (10%) and Cape town at 2 132 MT (9 %). Other markets in the top ten included Ekurhuleni at 1 198 MT (5%), Buffalo City at 756 MT (3%) and Matlosana at 543 MT (2%). Mangaung (578 MT), Msunduzi (595 MT), Gqeberha (533 MT) and Matjhabeng (543 MT) all had 2% market share each. While Sol Plaatjie had no share whatsoever in the potato mass and revenue.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Mass (T)	10 0	4 40	2 13	2 29	578	756	595	1 19	533	543	497	136	36	139	127	0
%Share	42%	18%	9%	10%	2%	3%	2%	5%	2%	2%	2%	1%	0%	1%	1%	0%

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

Source: SAUFM (2023)

Figure 4 presents the estimated percentage share of revenue for top 10 potato markets. The Johannesburg market led at R80.5 million (42%), followed by Tshwane at R35.47 million (19%), eThekwini at R18.4 million (10%), Cape Town at R16 million (8%), Ekurhuleni at R9.5 million (5%) and Buffalo City at R6.29 million (3%). Mangaung at R4.7 million, Msunduzi at R4.59 million, Gqeberha at R4 million, Matlosana at R4.4 million and Matjhabeng at R3.69 million commanded 2% each of share of smallholder farmers in potatoes among the top ten markets.

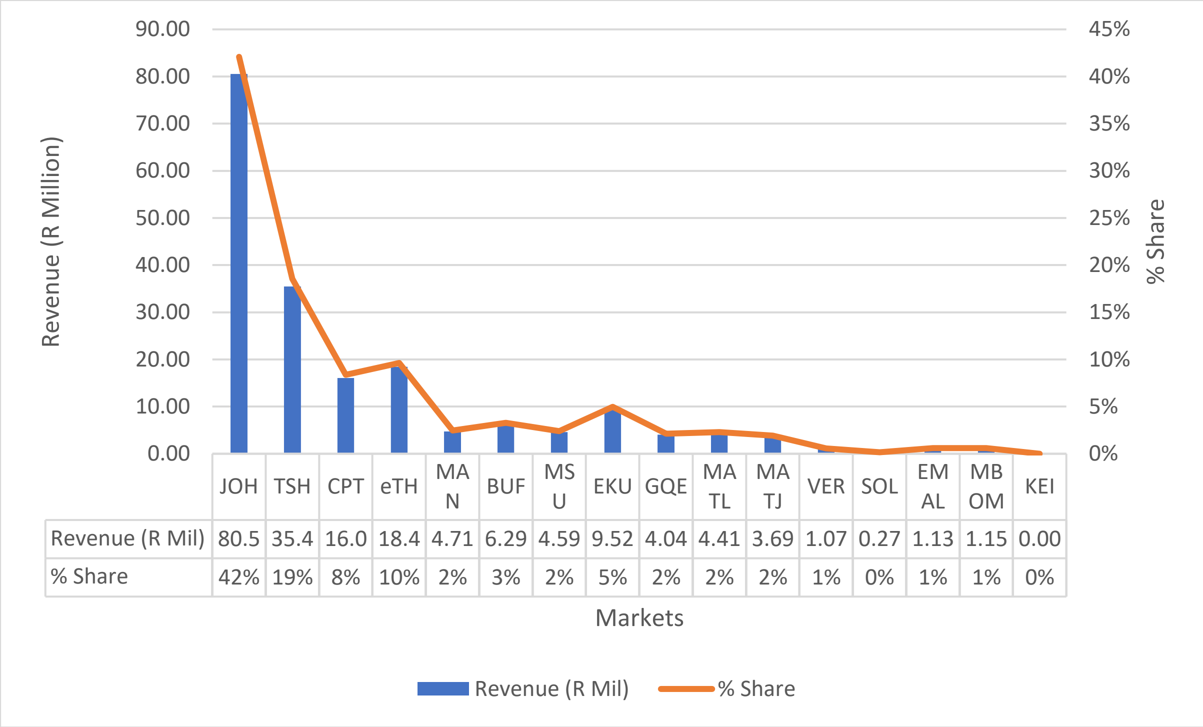


Figure 4: Estimated shares in revenue by top 10 markets for potatoes, July 2023

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 R55 million in revenue, derived from 6 787 MT in mass, followed by KZN at R11 million (1 196 MT), WC at R7.6 million (808 MT), EC at R4 million (385 MT), FS at R2 million (232 MT), NW at R823 314 (109 MT) and MP at R520 615 (62 MT). The NC had the lowest estimated revenue and mass at R71 139 (7 MT). The overall estimated revenue and mass were R81 million and 9 858MT, respectively.

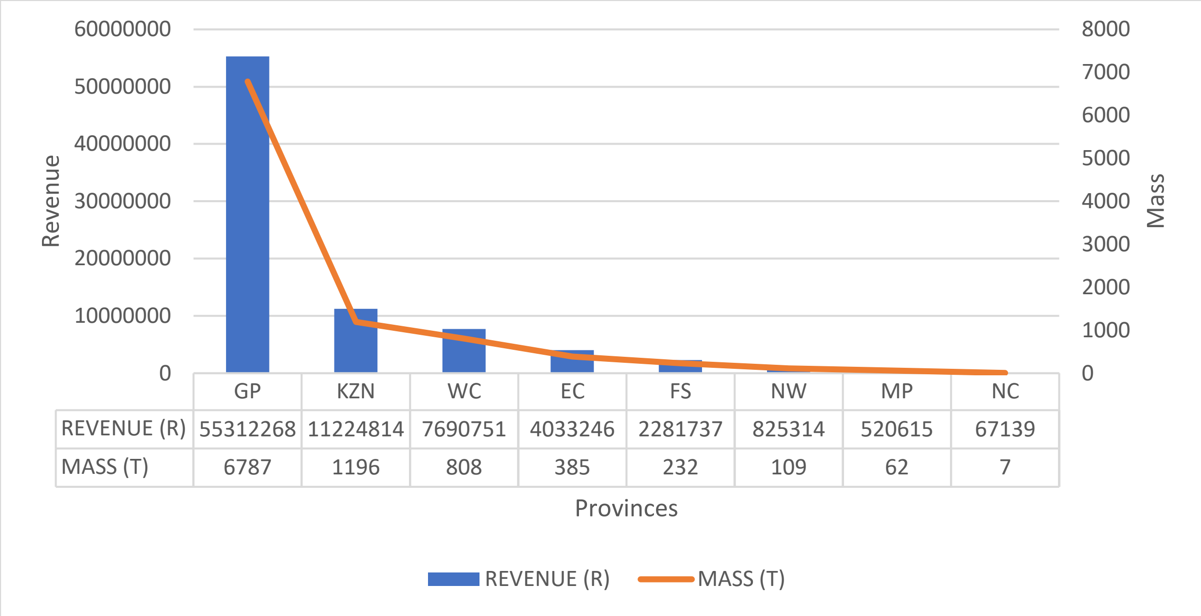


Figure 5: Summary of estimated revenue and mass of smallholder farmers in onions at provincial level, July 2023

Source: SAUFM (2023)

Figure 6 shows the estimated share of top 10 markets by mass for onions during July 2023. The Johannesburg market led at 4 995 MT (52%), followed by Tshwane with 1 557 MT (16%), eThekwini with 1 063 MT (11%) and Cape Town with 808 MT (8%). Other markets including Buffalo city (217 MT), Ekurhuleni (223 MT) and Qqeberha (168 MT) were all at 2% each. Mangaung (128 MT), Msunduzi (133 MT), Matlosana (101 MT) and Matjhabeng (91 MT) had the lowest share of smallholder farmers in onions among the top ten markets at 1% each. On the other hand, it is interesting to note that Vereeniging, Sol Plaatjie, Emalahleni and Mbombela did not make any contribution to the onion mass.

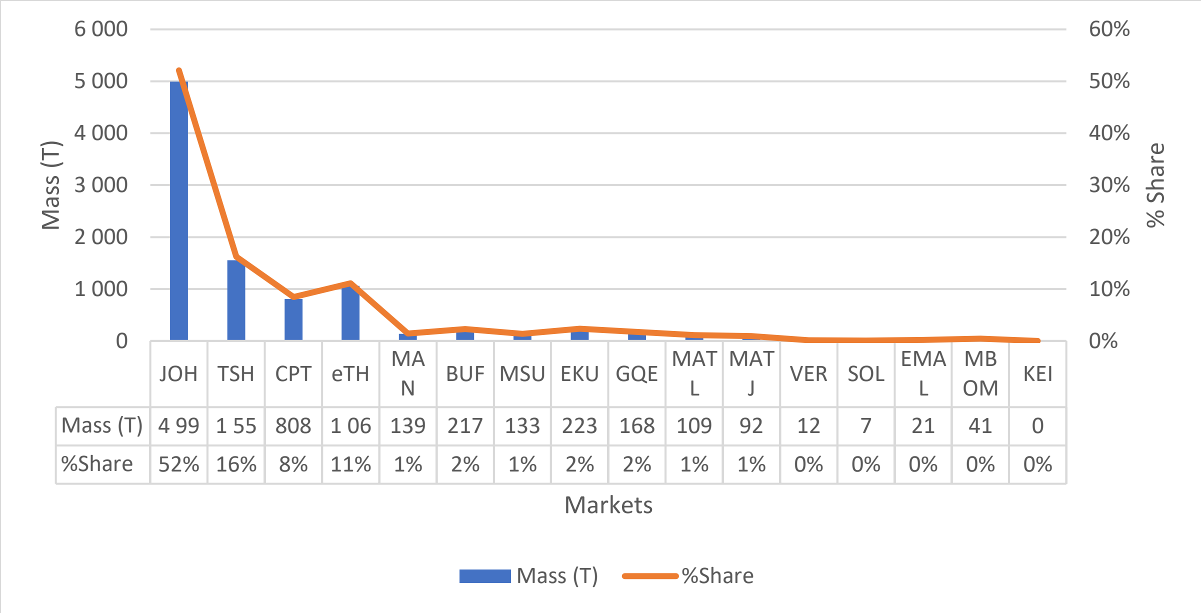
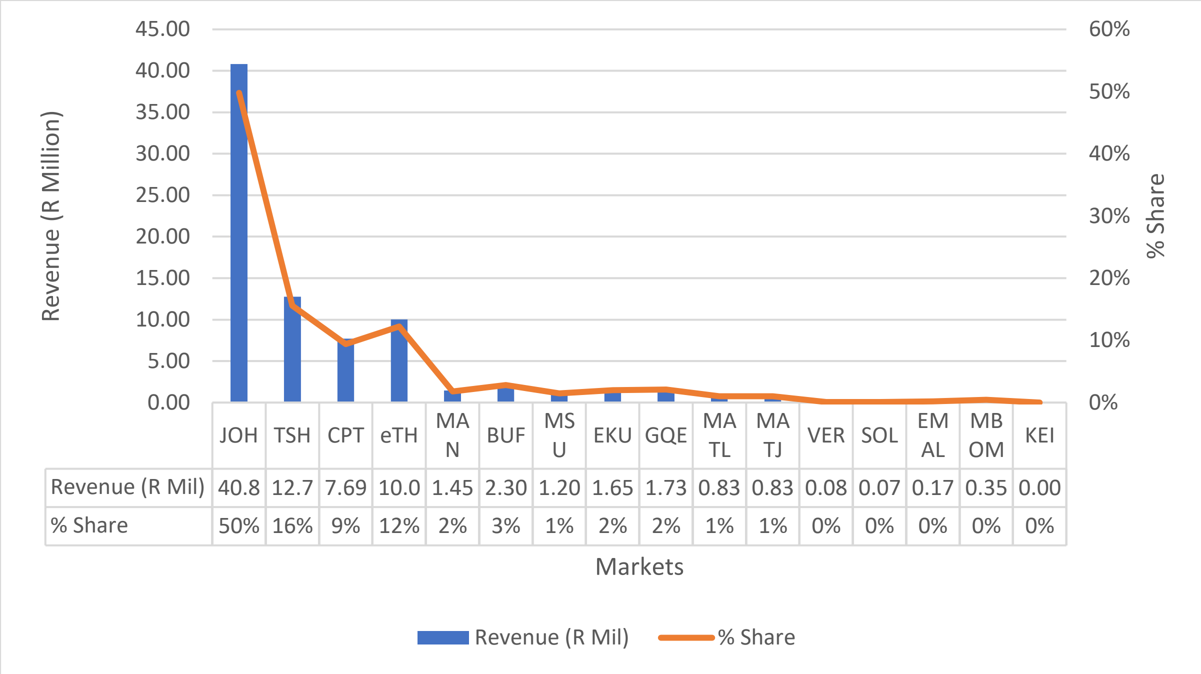


Figure 6: Estimated shares in top 10 markets by mass for onions, July 2023

Source: SAUFM (2023)

The estimated share by revenue in onions for top 10 markets is presented in **Figure 7**. The Johannesburg led at R40.81 million (50%), followed by Tshwane at R12.77 million (16%), eThekwini at R10.03 million (12%), Cape Town at R7.69 million (9%), and Buffalo City (R2.30 million) at 3%. Mangaung (R1.45 million), Msunduzi (R1.20 million), Gqeberha (R1.73) and Ekurhuleni (R1.65 million) had the same share at 2% each. Matlosana (R0.83 million) and Matjhabeng (R0.83 million) commanded the lowest share of smallholder farmers in onions among the top ten at 1% each. Vereeniging, Sol Plaatjie, Emalahleni and Mbombela did not make any contribution to the onion revenue.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Revenue (R Mil)	40.8	12.7	7.69	10.0	1.45	2.30	1.20	1.65	1.73	0.83	0.83	0.08	0.07	0.17	0.35	0.00
% Share	50%	16%	9%	12%	2%	3%	1%	2%	2%	1%	1%	0%	0%	0%	0%	0%

Figure 7: Estimated shares in revenue by top 10 markets for onions, July 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 led at R35.5 million in revenue derived from a total mass of 4 185 MT, followed by WC at R7.3 million (717 MT), KZN at R4.1 million (470 MT), FS at R2.8 million (294 MT), EC at R1.8 million (150 MT), NW at R1 million (121 MT) and NC at R278 812 (33 MT). MP province was at R120 661 (14 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 R53 million and 5 984 MT, respectively.

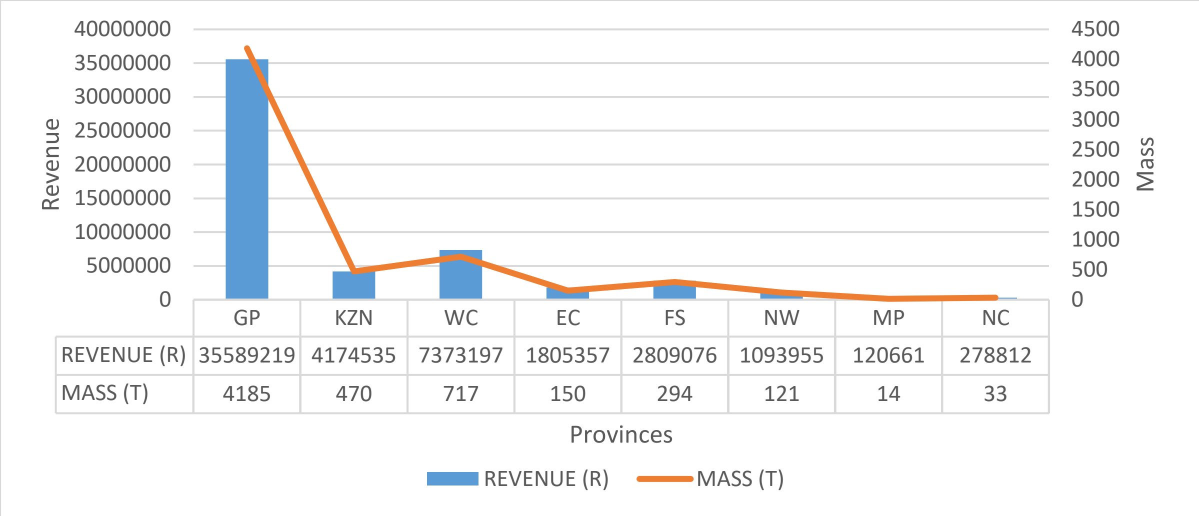


Figure 8: Summary of estimated revenue and mass of smallholder farmers in tomatoes at provincial level, July 2023

Source: SAUFM (2023)

Figure 9 shows the estimated share of top 10 markets by mass for tomatoes during July 2023. Tomatoes were the second largest traded commodity in terms of mass at fresh produce markets in July 2023. The Johannesburg market commanded the largest share of smallholder farmers at 51 %, translated as 3 036 MT (see Figure 9). This market was followed by Tshwane at 869 MT (15%), Cape Town at 717 MT (12%), eThekwini at 427 MT (7%), Ekurhuleni at 5% (270 MT), Mangaung at 3% (164 MT), and Matjhabeng (129 MT) and Matlosana (121 MT) at 2% each. Other markets among the top ten included Buffalo City (83 MT) and Gqeberha (67 MT) at 1 % each.

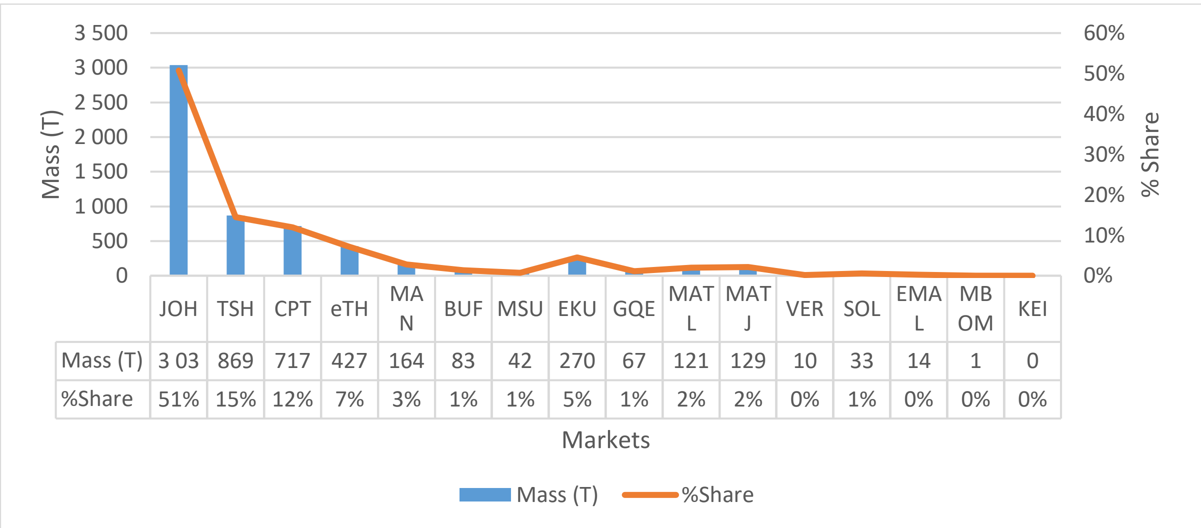
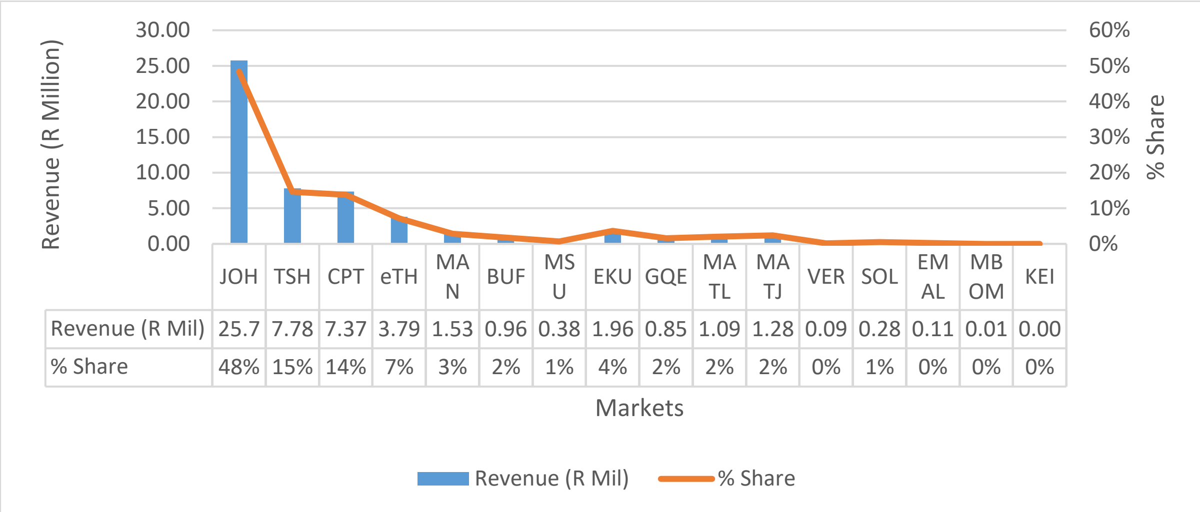


Figure 9: Estimated share in top 10 markets by mass for tomatoes, July 2023

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 in the top 10 markets was Johannesburg at 48% (R22.76 million), followed by Tshwane at 15% (R7.78 million), Cape Town at 14% (R7.37 million), eThekwini at 7% (R3.79 million), Ekurhuleni at R1.96 million (4%) and Mangaung at 3% (R1.53 million). Matjhabeng (R1.28 million), Matlosana (R1.09 million), Buffalo City (R0.96 million) and Gqeberha (R0.85 million) all had 2% market share each.

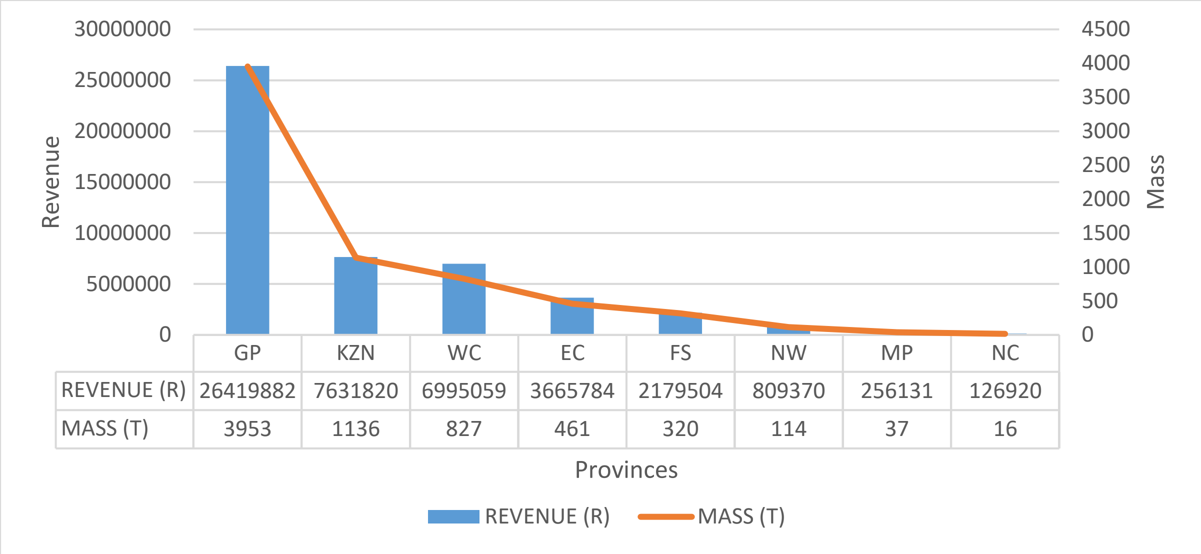


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Revenue (R Mil)	25.7	7.78	7.37	3.79	1.53	0.96	0.38	1.96	0.85	1.09	1.28	0.09	0.28	0.11	0.01	0.00
% Share	48%	15%	14%	7%	3%	2%	1%	4%	2%	2%	2%	0%	1%	0%	0%	0%

Figure 10: Estimated share in revenue by top 10 markets for tomatoes, July 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 R26.4 million derived from a total mass of 3 953 MT, followed by KZN at R7.6 million (1 136 MT), WC at R6.9 million (827 MT), EC at R3.6 million (461 MT), FS at R2.1 million (320 MT) and NW at R809 370 (114 MT). The revenue of smallholder farmers for bananas in MP was estimated at R256 131 (37 MT) while NC had the lowest estimated revenue of smallholder farmers in banana at R126 920 (16 MT) over the reported month. The estimated overall smallholder revenue and mass for bananas were R48 million and 6 864 MT, respectively.

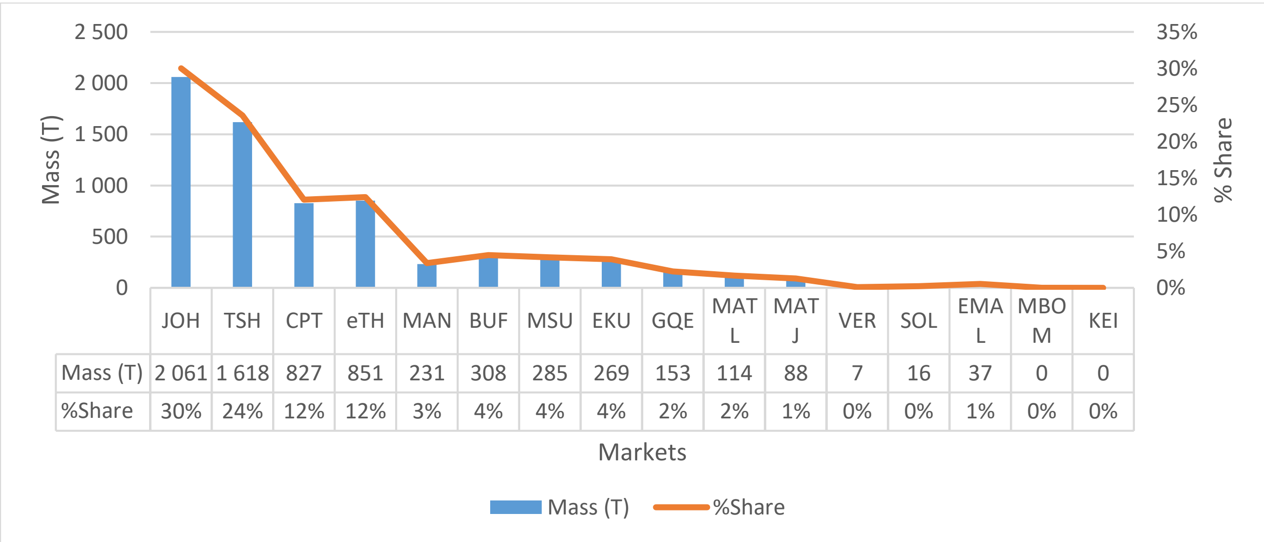


	GP	KZN	WC	EC	FS	NW	MP	NC
REVENUE (R)	26419882	7631820	6995059	3665784	2179504	809370	256131	126920
MASS (T)	3953	1136	827	461	320	114	37	16

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

Source: SAUFM (2023)

Bananas constituted the most traded fruit in the fresh produce market system in July 2023. By mass, the Johannesburg Market commanded the largest share of smallholder farmers at 30 % (2 061 MT) (see **Figure 12**). It was followed by Tshwane at 24% (1 618 MT), eThekwini and (851 MT) and Cape Town both at 12% (827 MT). Buffalo City (308 MT), Msunduzi (285 MT), and Ekurhuleni (269 MT) were all at 4% each. The Mangaung Market stood at 3% (231 MT) while Gqeberha (153 MT) and Matlosana (114 MT) both stood at 2%.

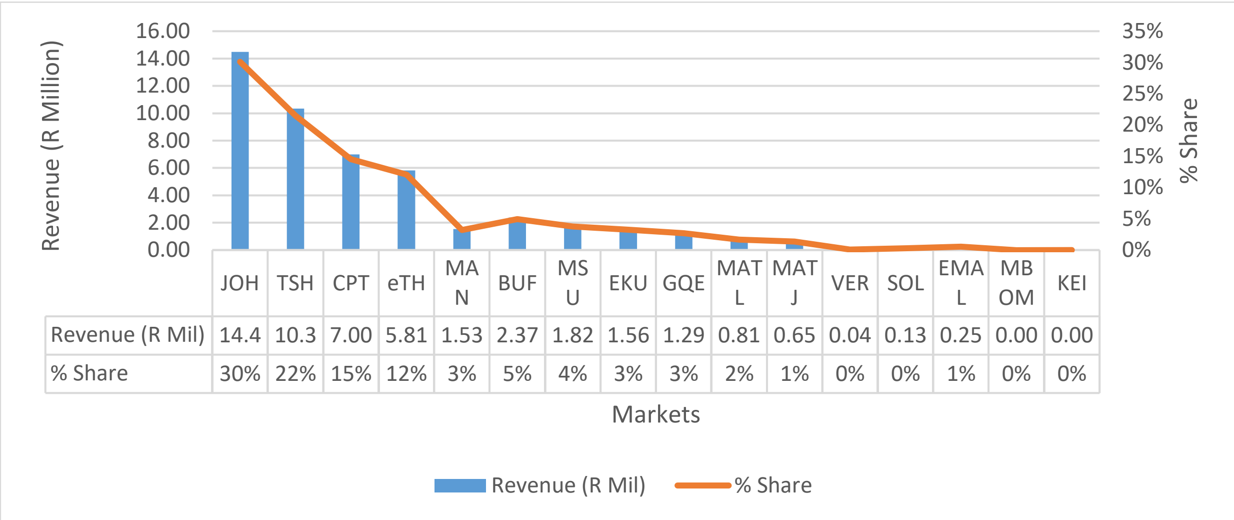


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Mass (T)	2 061	1 618	827	851	231	308	285	269	153	114	88	7	16	37	0	0
%Share	30%	24%	12%	12%	3%	4%	4%	4%	2%	2%	1%	0%	0%	1%	0%	0%

Figure 12: Estimated shares in top 10 markets by mass for bananas, July 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 30% (R14.48 million), followed by Tshwane at 22% (R10.34 million), Cape Town at 15% (R7 million), eThekwini at 12% (R5.81 million), Buffalo City at 5% (R2.37 million) and Msunduzi at 4% (R1.82 million). The Ekurhuleni (R1.56 million), Mangaung (R1.53 million) and Gqeberha (R1.29 million) markets were all at 3% each. The Emalahleni Market had the least share of 1% (R0.25 million).



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Revenue (R Mil)	14.4	10.3	7.00	5.81	1.53	2.37	1.82	1.56	1.29	0.81	0.65	0.04	0.13	0.25	0.00	0.00
% Share	30%	22%	15%	12%	3%	5%	4%	3%	3%	2%	1%	0%	0%	1%	0%	0%

Figure 13: Estimated shares revenue by in top 10 markets for bananas, July 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 R86 million derived from a total mass of 12 369 MT. This market was followed by WC at R 15 million (1 495 MT), KZN at R8.8million (1 188 MT), FS at R3.7 million (683 MT), EC at R3.2 million (456 MT), and NW at R1.5 million (323 MT). The MP had an estimated revenue of other vegetables at R0.3 million (65 MT) while NC stood at R0.1 million (44 MT). The overall revenue and mass of smallholder farmers in other vegetables in July 2023 was R119 million and 16 633 MT, respectively.

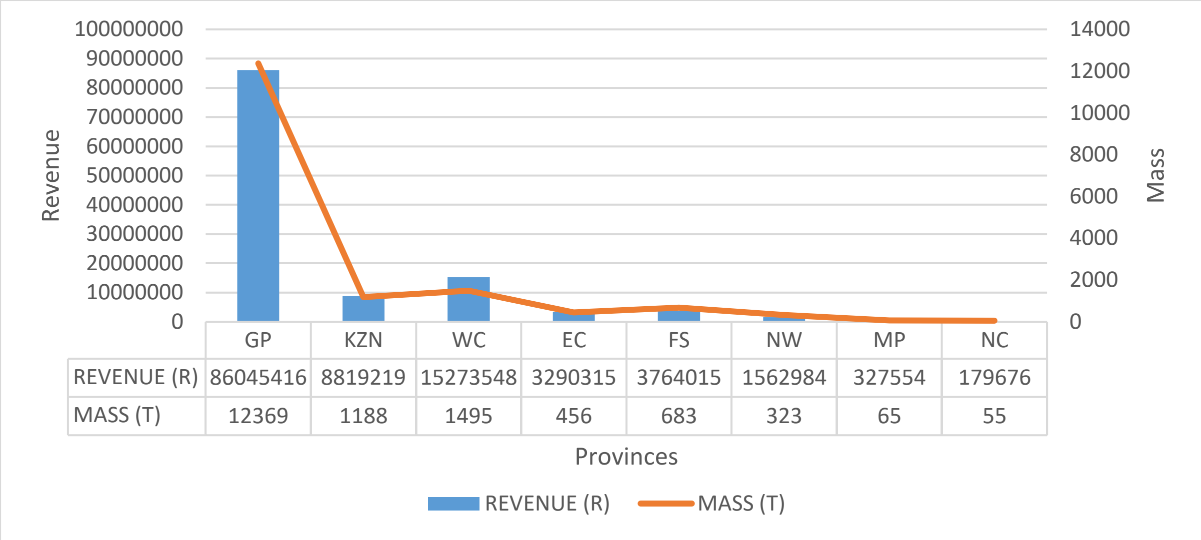


Figure 14: Summary of estimated revenue and mass of smallholder farmers in other vegetables at provincial level, July 2023

Source: SAUFM (2023)

Market shares for smallholder farmers by mass in other vegetables traded in the various fresh produce markets in July 2023 are illustrated in **Figure 15**. The Johannesburg Market commanded the largest share at 50% (8 302 MT) (see Figure 15), followed by Tshwane at 22% (3 700 MT), Cape Town at 9% (1 495 MT), eThekwini at 7% (1 087 MT) and Mangaung at 3% (491 MT). The Ekurhuleni (353 MT), Matlosana (323 MT) and Buffalo City (258 MT) markets were all at 2% each, while Gqeberha (198 MT) and Msunduzi (101 MT), stood at 1% each.

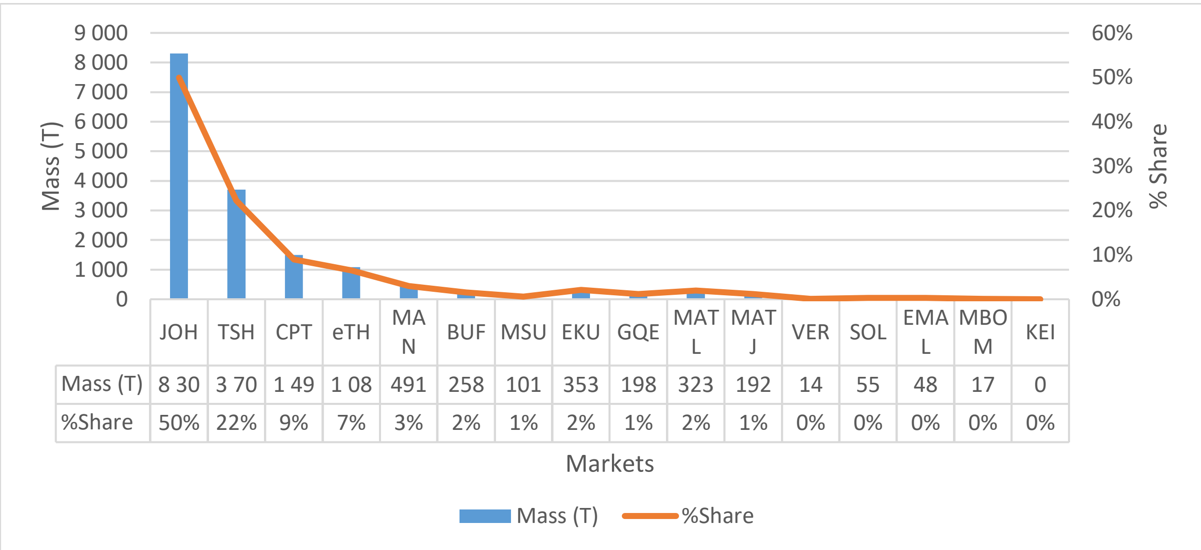
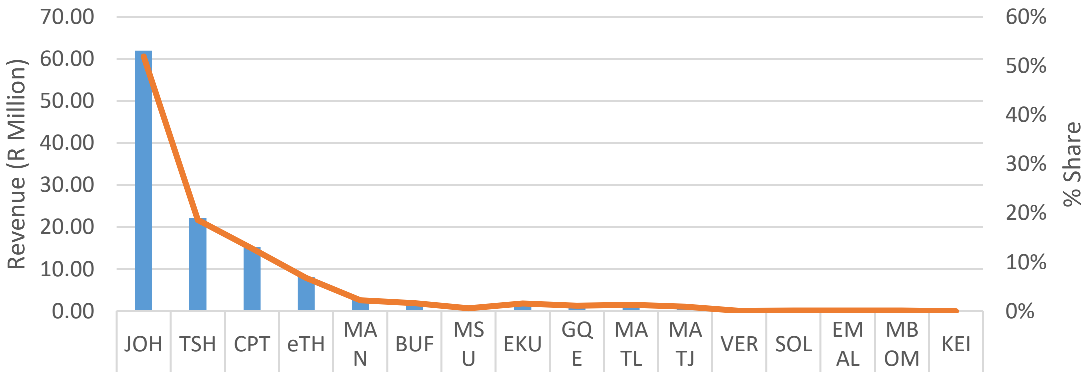


Figure 15: Estimated shares in top 10 markets by mass for other vegetables, July 2023

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 52% (R61 million), followed by Tshwane at 19% (R22 million), Cape Town 13% (R15 million), eThekwini at 7% (R7 million), Mangaung at 2% (R2.6 million), Buffalo City at 2% (R1.3 million), and Ekurhuleni also at 2% (R1.8 million). The Matlosana (R1.56 million), Gqeberha (R1.36 million), Matjhabeng (R1 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)	61.9	22.2	15.2	8.09	2.67	1.93	0.73	1.86	1.36	1.56	1.10	0.07	0.18	0.19	0.14	0.00
% Share	52%	19%	13%	7%	2%	2%	1%	2%	1%	1%	1%	0%	0%	0%	0%	0%

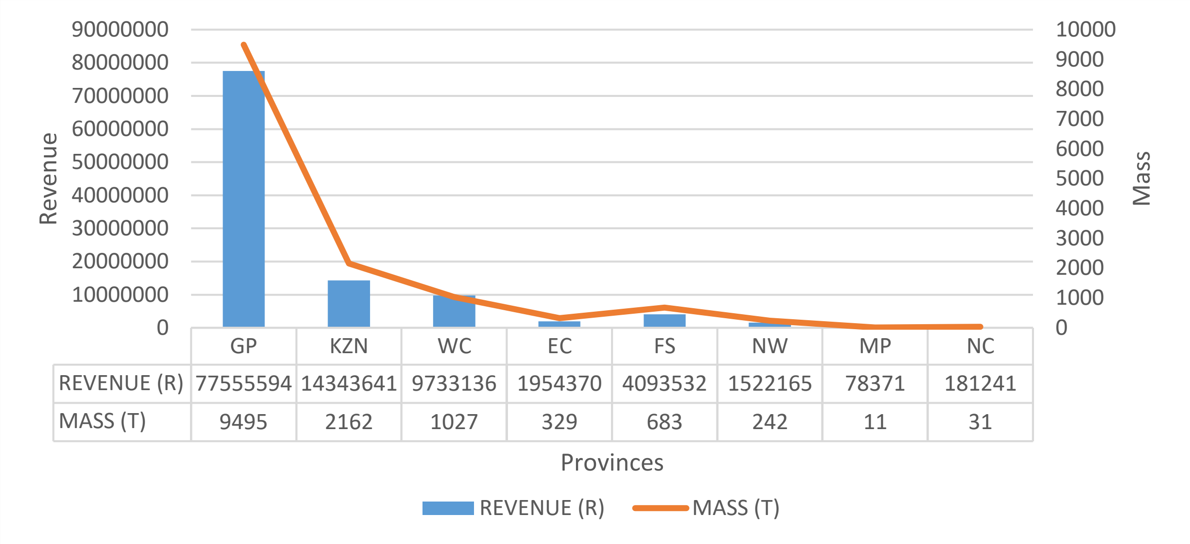
Markets

Revenue (R Mil)   % Share

Figure 16: Estimated shares in revenue by markets for other vegetables, July 2023
Source: SAUFM (2023)

3.6 OTHER FRUITS

Figure 17 presents the other fruits estimated revenue and mass from smallholder farmers in eight provinces of South Africa during July 2023. GP province was leading with a revenue of R77.5 million derived from a total mass of 9 495 MT, followed by KZN at R14.3 million (2 162 MT), WC at R9.7 million (1 027 MT), FS at R4 million (683 MT), EC at R1.9 million (329MT) and NW at R1.5 million (242 MT). The NC province had R0.1 million (31 MT) while MP had the lowest estimated revenue from smallholder farmers in other fruits at R0.07 million (11 MT). The estimated overall revenue from the sale of other fruits on the fresh produce markets by smallholder farmers was R109 million matched by a volume of 13 979 MT.

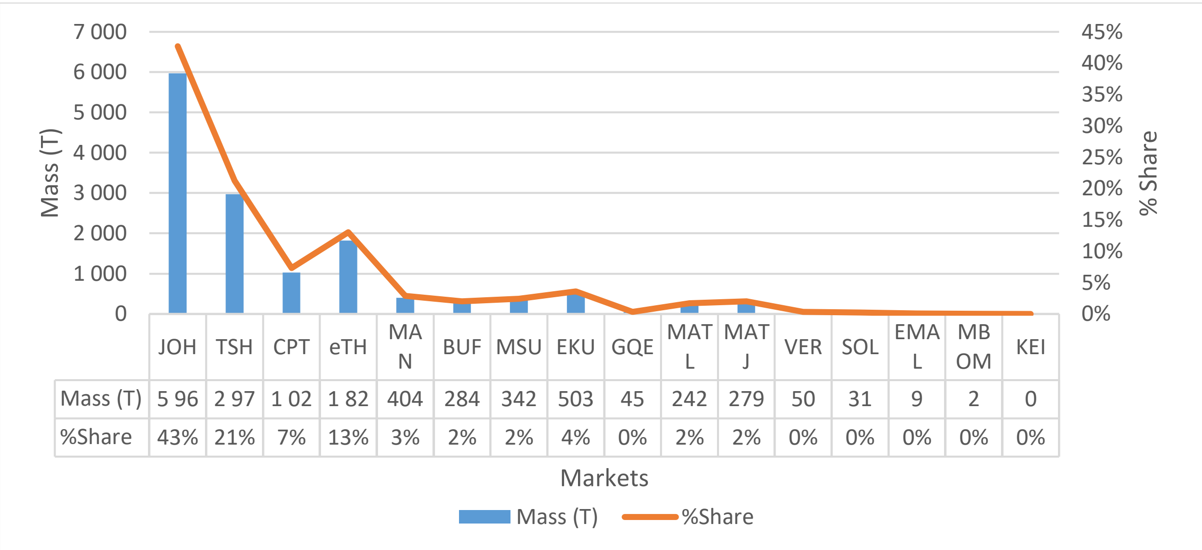


	GP	KZN	WC	EC	FS	NW	MP	NC
REVENUE (R)	77555594	14343641	9733136	1954370	4093532	1522165	78371	181241
MASS (T)	9495	2162	1027	329	683	242	11	31

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

Source: SAUFM (2023)

Market shares by mass for other fruits traded in the various fresh produce markets are illustrated in **Figure 18**. The Johannesburg Market commanded the largest share of smallholder farmers at 43% (5 969 MT) (see Figure 18), followed by Tshwane at 21% (2 973 MT), eThekwini at 13% (1 820 MT), Cape Town at 7% (1 027 MT), Ekurhuleni at 4% (503 MT) and Mangaung (438 MT) at 3%. Msunduzi (342 MT), Buffalo City (284 MT), Matjhabeng (279 MT) and matlosana (242 MT) markets all commanded 2% market share each.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM	KEI
Mass (T)	5 96	2 97	1 02	1 82	404	284	342	503	45	242	279	50	31	9	2	0
%Share	43%	21%	7%	13%	3%	2%	2%	4%	0%	2%	2%	0%	0%	0%	0%	0%

Figure 18: Estimated shares in top 10 markets by mass for other fruits, July 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 49% (R53.85 million), Tshwane at 19% (R20.48 million), eThekwini at 11% (R12.3 million), Cape Town at 9% (R9.7 million), and Ekurhuleni at 3% (R3 million). Mangaung (R2.64 million), Msunduzi (R2 million) and Buffalo City (R1.7 million) markets were all at 2% each, while Matlosana (R1.52 million) and Matjhabeng (R1.45 million) stood at 1% each.

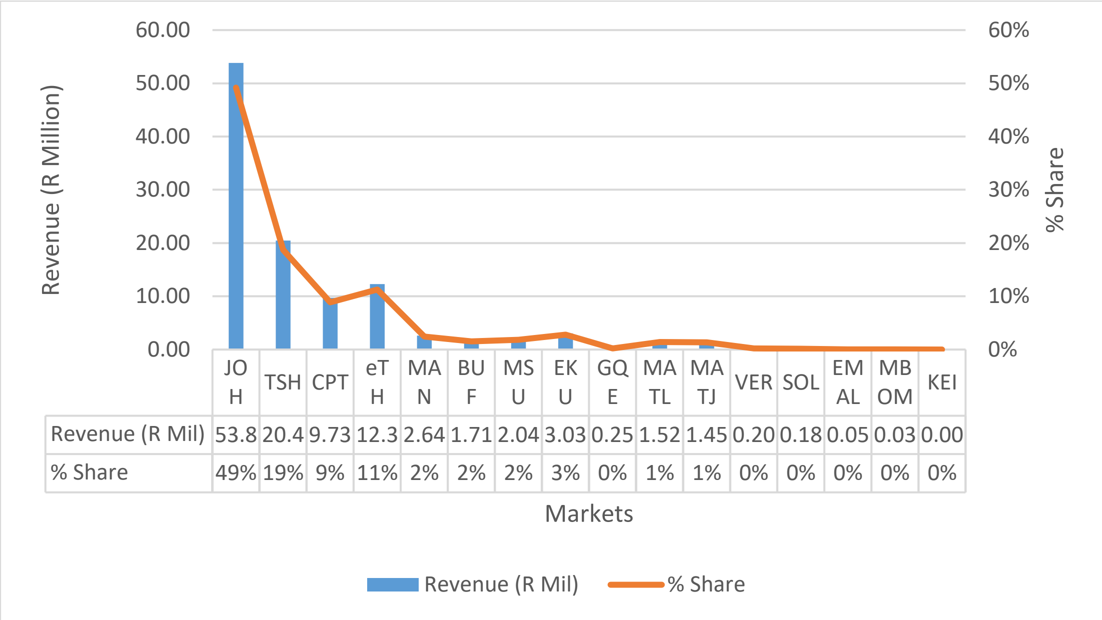
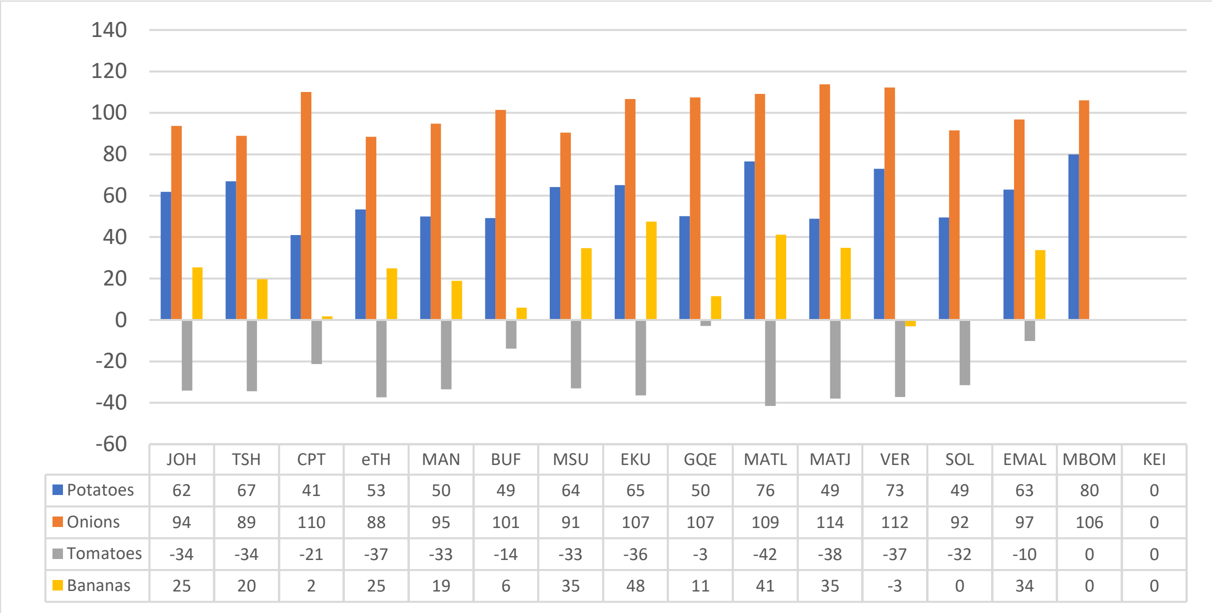


Figure 19: Estimated shares in revenue by top 10 markets for other fruits, July 2023

Source: SAUFM (2023)

3.7 PRICES

Figure 20 illustrates price changes measured in percentages for the top four agricultural commodities in the fresh produce markets, comparing July 2022 and July 2023. Over the study period, potatoes showed significant growth in prices especially in Msunduzi, Mbombela, Emalahleni, Matlosana, Ekurhuleni and eThekwini markets. Prices for onions displayed the upward growth during the period under review and averaged at 50% increase in all the markets. Prices for tomatoes decreased in all the markets except for Buffalo City during the period under review and the decreases averaged 8%. Finally, prices for bananas in all markets 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 especially for 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 a decrease of 8% in the total tomatoes traded at the NFPMs 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 July 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 a 30% share of each traded agricultural product as recommended in the NAMC Section 7 committee report published in 2006. In July 2023, the total mass traded from the NFPMs was 257 043 MT, generating a total revenue of R2 billion. This indicates a decline of 5% (13 455 MT) in mass traded and a 27% (R 424 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 77 113 MT and R603 million, respectively. A further analysis of this at the provincial level shows that GP was leading at 52 623 MT (68%), matched by a revenue of R407 million (68 %). This was followed by KZN at 9 046 MT (R69 million), WC at 7 006 MT (R63 million), Free State at 3 285 MT (R23.5 million), EC at 3 070 MT (R25 million), NW at 1 451MT (R 10 million) and MP at 455 MT (R3.5 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 34 456 MT (R277 million), followed by Tshwane at 15 122 MT (R109 million), Cape Town at 7 006 MT (R63 million), eThekwini at 7 547 MT (R58 million), Ekurhuleni at 2 816 MT (R19.5 million), Buffalo City at 1 906 MT (R15.5 million), Mangaung at 2 008 MT (R14.5 million), Msunduzi at 1 499 MT (R10.7 million), Matlosana at 1 451 MT (R10.2 million) and Gqeberha at 1 164 MT (R9.5 million). No sales were reported for the Kei Market during July 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 Rand 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 Msunduzi, Mbombela, Emalahleni, Matlosana, Ekurhuleni and eThekwini markets. Prices for onions displayed an increase during the period under review with an average increase of 50% in all markets. Finally, prices for bananas by market presented an increasing trend during the period under review.

WHAT DO YOU LOVE ABOUT SOUTH AFRICAN AGRICULTURE?

JOIN THE MOVEMENT ON SOCIAL MEDIA AND SHARE WHAT YOU LOVE ABOUT SOUTH AFRICAN AGRICULTURE USING #LoveRSAAgriculture

Dr Ndiadivha Tempia
Enquiries: +27 12 341 1115
ntempia@namc.co.za

Compiled by Mr Khathutshelo Rambau through the assistance of Mr Elvis Nakana, Mr Kayalethu Sotsha and Mr Phelelani Sibiya
Sandra Wolfaardt is acknowledged for assistance provided to the NAMC in terms of NFPM data.

GET IN TOUCH

536 Francis Baard Street,
Meintjiesplein Building,
Block A, 4th Floor, Arcadia,
0007

Private Bag X935, Pretoria, 0001

012 341 1115

info@namc.co.za

www.namc.co.za