SMALLHOLDER MARKET ACCESS ESTIMATES

August 2023

National Agricultural Marketing Council

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ABBREVIATIONS

For this report the following acronyms are used:

- Buf Buffalo City
- Cap Cape Town
- DALRRD Department of Agriculture, Land Reform and Rural Development
- 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
- SAWS South African Weather Service
- 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 August 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 spread across eight provinces in South Africa namely; Gauteng, Free State, Western Cape, Eastern Cape, KwaZulu Natal, North West, Northern Cape, and Mpumalanga. The analysis is limited to potatoes, onions, tomatoes, bananas and other vegetables and 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 generated. Monthly data for these commodities were obtained from the South African Union of Food Markets (SAUFM) and Department of Agriculture, Land Reform and Rural Development (DALRRD).

2. OVERVIEW OF THE MONTH – AUGUST 23

Based on **Table 1,** a summary of the revenue and mass for selected fruit and vegetable markets in South Africa is presented. In August 2023, the total mass traded from the NFPM as 269 197 MT, generating a total revenue of R2.1 billion. This indicates a decline of 7 % (21 563 MT) in mass and a 23.8 % (R411 million) growth in revenue compared to the same month during the previous year. The increase in revenue can be attributed to substantial rise in the inflation rate of vegetables over the last year. Other factors attributing to this include elevated production costs for vegetables, exacerbated by drought incidents that make it challenging for farmers to produce during dry conditions. As per the South African Weather Service (SAWS) report of 2023, multiple regions across South Africa encountered significant drought conditions from March to August 2023. These affected regions encompassed locations such as Limpopo, North-west and the Northern Cape. Concurrently, areas like KwaZulu Natal, Mpumalanga, Eastern Cape, Western Cape, and the Free State received below-average rainfall during the same period.

Table 1: Summary of fresh produce market statistics for revenue and mass by top commodities in August 2023

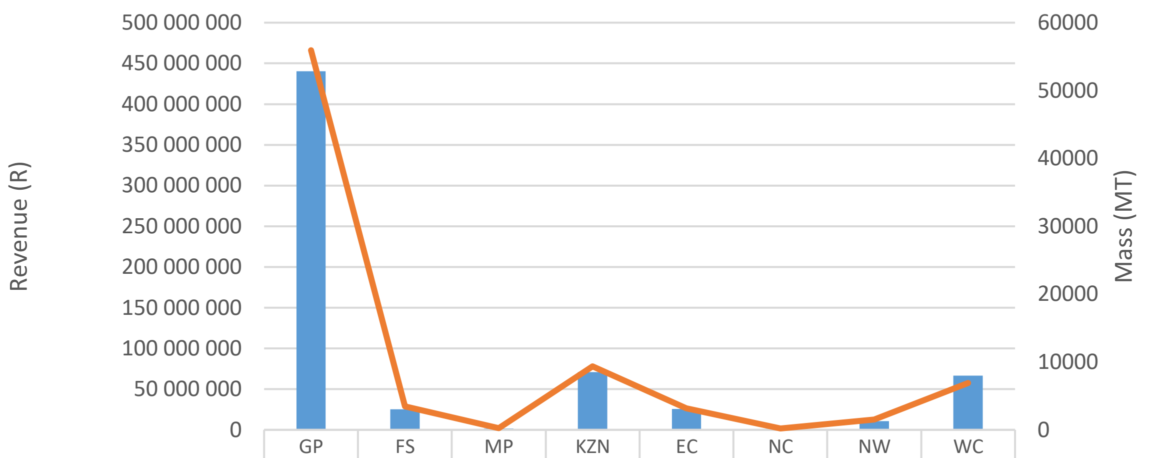
Commodity	Revenue (Rands)	Mass (MT)
Total	R2 142 046 121	269 197
Potatoes	R646 697 599	86 192
Onions	R261 661 640	30 760
Tomatoes	R159 420 050	26 185
Bananas	R181 151 413	19 670
Other vegetables	R469 723 628	56 738
Other fruits	R423 391 791	49 652

Source: DALRRD, 2023 & SAUFM,2023

The total mass of potatoes amounted to 86 192 MT, indicating a decrease of 11 % compared to the same month in the previous year. In addition, the revenue increased by 61% during the same period to reach R646 million. On the other hand, the total mass for onions decreased by 5% (32 242 MT) to 30 760 MT in August 2023. But the revenue grew by 36 % (R192 million) to reach R 261 million. Tomatoes had a total mass of 26 185 MT, indicating an increase of 54%. This traded mass was matched by a total revenue of R159 million, indicating a 26% decrease. Bananas showed a decrease of 33% (29 551 MT) in mass traded at 19 670 MT, matched by increase of R25.7 million in revenue to reach R181 million in August 2023. While other vegetables traded in the system recorded a decrease of 2% (1 266 MT) in mass at 56 738 MT, matched by an increase of 18% (R74 million) in revenue. In August 2023, there was a 13% decline (57 038 MT) in the traded mass of other fruits compared to the 49 652 MT recorded in August 2022. However, the revenue from these fruits increased by 14.9%, rising from R368 million to reach R423 million during the same reporting period.

3. ESTIMATED SHARE OF SMALLHOLDER FARMERS

Based on **Figure 1,** a summary of the estimated revenue and mass generated by smallholder farmers from various provinces is presented. For the month of August 2023, the ideal share of smallholder farmers in terms of mass and revenue was estimated at 80 759 MT and R642 million, respectively. Further analysis at the provincial level shows that GP was leading at 55 938 MT (69%) matched by a revenue of R440 million (68 %). This was followed by KZN at 9 347 MT (R70 million), WC at 6 901 MT (R66 million), EC at 3 161 MT (R25 million), FS at 3 456 MT (R25 million), NW at 1 519 MT (R 10.8 million) and MP at 240 MT (R1.6 million). The NC had the lowest mass from smallholder farmers at 199 MT (R1.2 million).



	GP	FS	MP	KZN	EC	NC	NW	WC
30% share (revenue)	440 275 7	25 290 01	1 691 612	70 911 05	25 784 72	1 201 116	10 817 15	66 642 41
30% share (Mass)	55938	3456	240	9347	3161	199	1519	6901

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

Source: DALRRD, 2023 & SAUFM,2023

Based on **Table 2,** the estimated distribution of smallholder farmer's deliveries to markets based on revenue and mass for August 2023 is presented. The Johannesburg market led with a volume of 36 426 MT (R297 million), followed by Tshwane at 15 952 MT (R118 million), Cape Town at 6 901 MT (R66 million), eThekwini at 7 798 MT (R59 million), Ekurhuleni at 2 253 MT (R 22 million), Buffalo City at 2 008 MT (R16 million), Mangaung at 2 080 MT (R15.8 million), Msunduzi at 1 548 MT (R10.9 million), Matlosana at 1 519 MT (R10.8 million) and Gqeberha at 1 153 MT (R9 million).

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

Market	Revenue (Rands)	Mass (MT)
Johannesburg	R297 363 152	36426
Tshwane	R118 574 518	15952
Cape Town	R66 642 418	6901
eThekwini	R59 952 178	7798
Mangaung	R15 851 717	2080
Buffalo City	R16 489 319	2008
Msunduzi	R10 958 877	1548
Ekurhuleni	R22 262 967	3253
Gqeberha	R9 29 5409	1153
Matlosana	R10 817 151	1519
Matjhabeng	R9 438 297	1376
Vereeniging	R2 075 109	308
Sol Plaatjie	R1 201 116	199
Emalahleni	R1 621 392	231
Mbombela	R70 220	9

Source: DALRRD, 2023 & SAUFM,2023

3.1 POTATOES

Based on **Figure 2,** an overview of the estimated revenue and mass for smallholder farmers cultivating potatoes, categorized by province is presented. The highest estimated market revenue and mass for smallholder farmers in potatoes was observed in GP at R128 million derived from 17 281 MT. This was followed by KZN at R24 million (3 166 MT), WC at R16 million (2 059 MT), EC at R10 million (1 324 MT), FS at R9 million (1 290 MT), NW at R4 million

(573 MT), and MP at R1 million (128 MT). The least was NC at R260 657 (36 MT). The overall revenue in potatoes was at R194 million (25 858 MT). Potatoes remain the largest traded agricultural product on the fresh produce market system in South Africa.

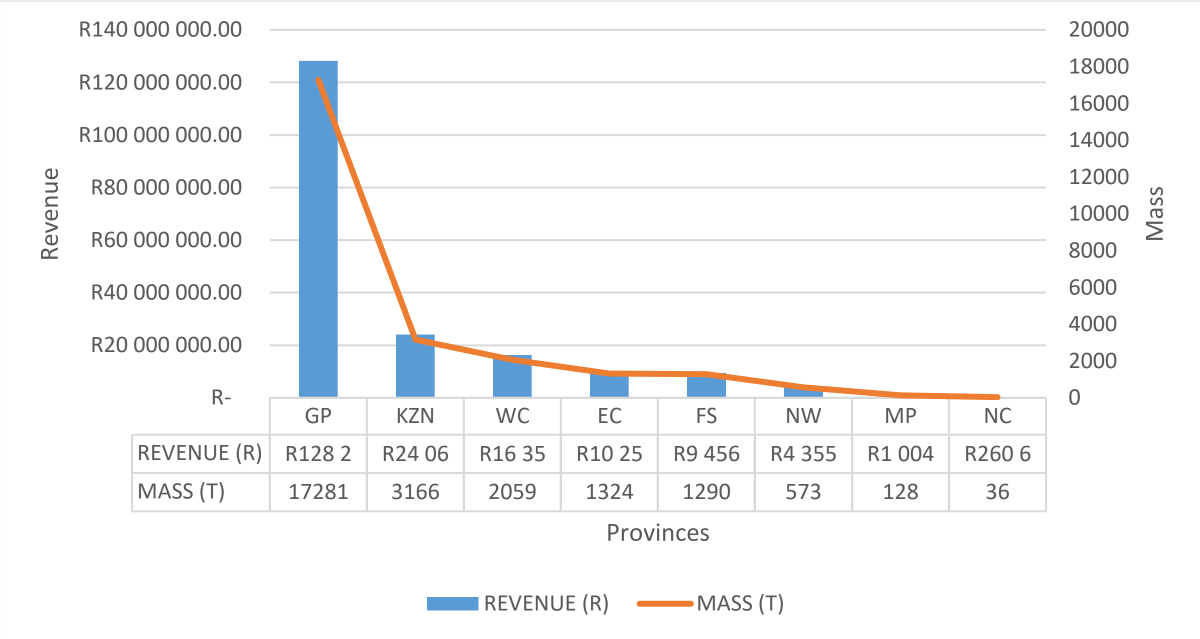
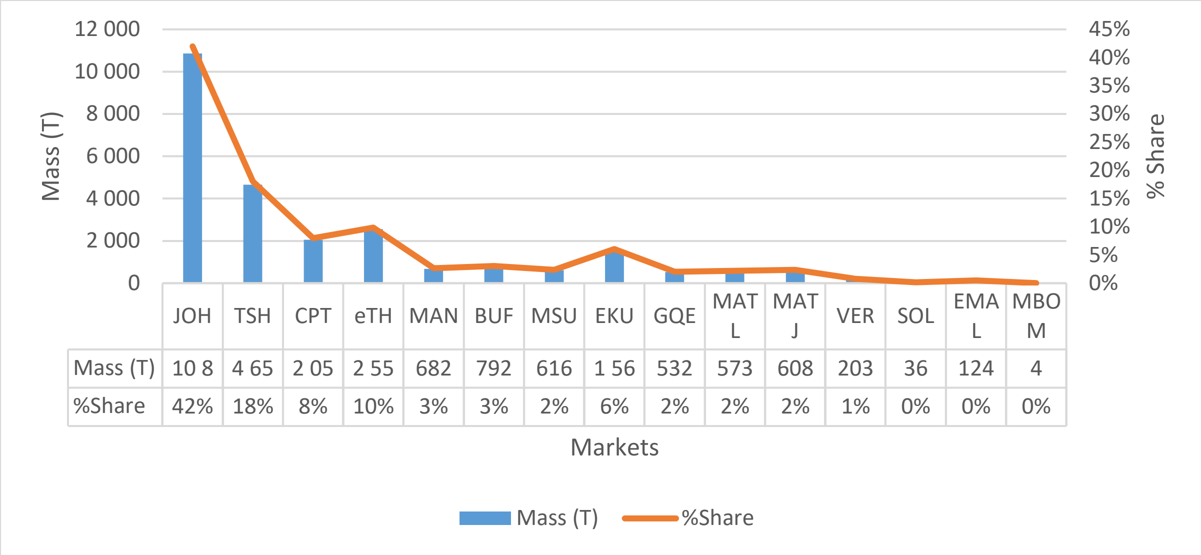


Figure 2: Summary of estimated revenue and mass of smallholder farmers in potatoes at provincial level, August 2023

Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 3,** the potatoes estimated share of smallholder farmers in the top 10 markets is presented. Johannesburg led at 10 856 MT (42%), followed by Tshwane at 4 658 MT (18%), eThekwini at 2 550 MT (10%) and Cape town at 2 059 MT (8%). Other markets in the top ten included Ekurhuleni at 1 565 MT (6%), Buffalo City at 792 MT (3%) and Mangaung at 682 MT (3%). On the other hand, Matjhabeng (608 MT), Msunduzi (616 MT), Matlosana at 573 MT, Gqeberha (532 MT) all had 2% market share each.

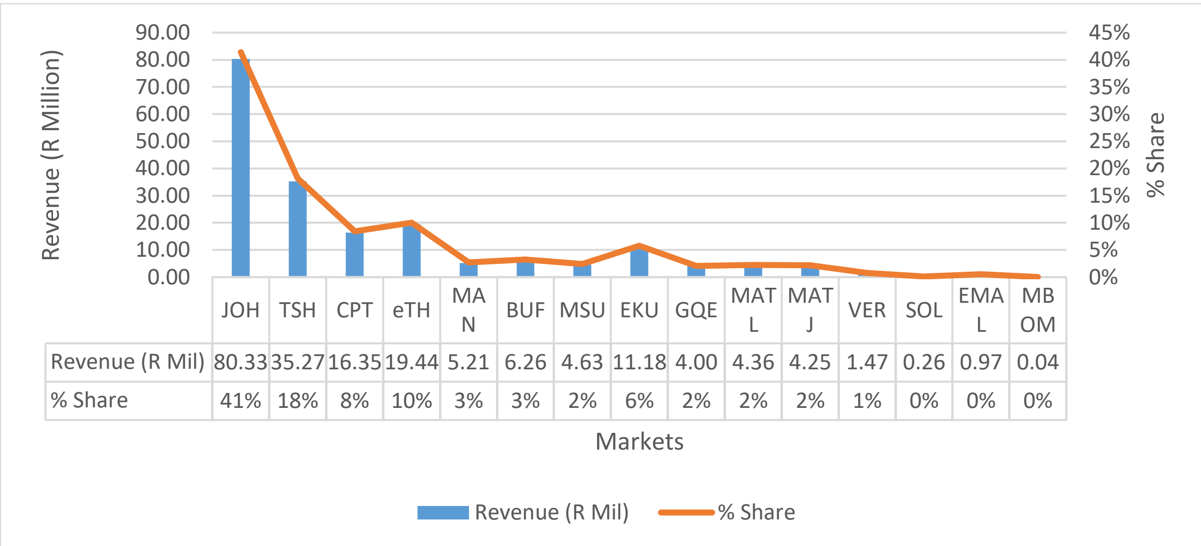


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MAT L	MAT J	VER	SOL	EMA L	MBO M
Mass (T)	10 8	4 65	2 05	2 55	682	792	616	1 56	532	573	608	203	36	124	4
%Share	42%	18%	8%	10%	3%	3%	2%	6%	2%	2%	2%	1%	0%	0%	0%

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

Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 4,** the estimated percentage share in revenue for top 10 potato markets for smallholder farmers is presented. The Johannesburg market led at R80.33 million (41%), followed by Tshwane at R35.27 million (18%), eThekwini at R19.44 million (10%), Cape Town at R16.35 million (10%), Ekurhuleni at R11.18 million (6%) and Buffalo City at R6.26 million (3%). Mangaung at R5.21 million, Msunduzi at R4.63, Matlosana at R4.36 million, Matjhabeng at R4.25 million and Gqeberha at R4.00 million commanded 2% each of share of smallholder farmers in potatoes among the top ten markets.



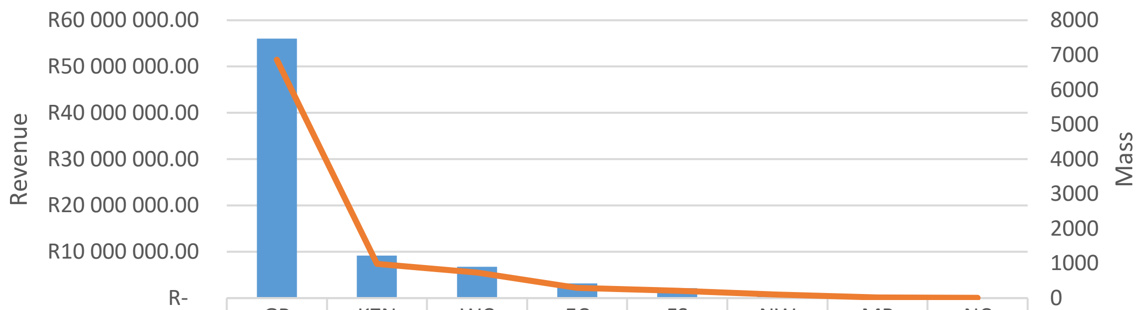
	JOH	TSH	CPT	eTH	MA N	BUF	MSU	EKU	GQE	MAT L	MAT J	VER	SOL	EMA L	MB OM
Revenue (R Mil)	80.33	35.27	16.35	19.44	5.21	6.26	4.63	11.18	4.00	4.36	4.25	1.47	0.26	0.97	0.04
% Share	41%	18%	8%	10%	3%	3%	2%	6%	2%	2%	2%	1%	0%	0%	0%

Figure 4: Estimated shares of smallholder farmers in revenue by top 10 markets for potatoes, August 2023

Source: DALRRD, 2023 & SAUFM,2023

3.2 ONIONS

Based on **Figure 5,** onions estimated revenue and mass of smallholder farmers in eight provinces is presented. The GP was the leading province with R56 million in revenue, derived from 6 863 MT in mass, followed by KZN at R9 million (988 MT), WC at R6.8 million (734 MT), EC at R3 million (296 MT), FS at R2 million (215 MT), NW at R920 739 million (106 MT) and MP at R 137 336 million (17 MT). The NC at R75 189 (8 MT) had the lowest estimated revenue and mass form smallholder farmers in onions. The overall estimated revenue and mass were R78 million and 9 228 MT, respectively.

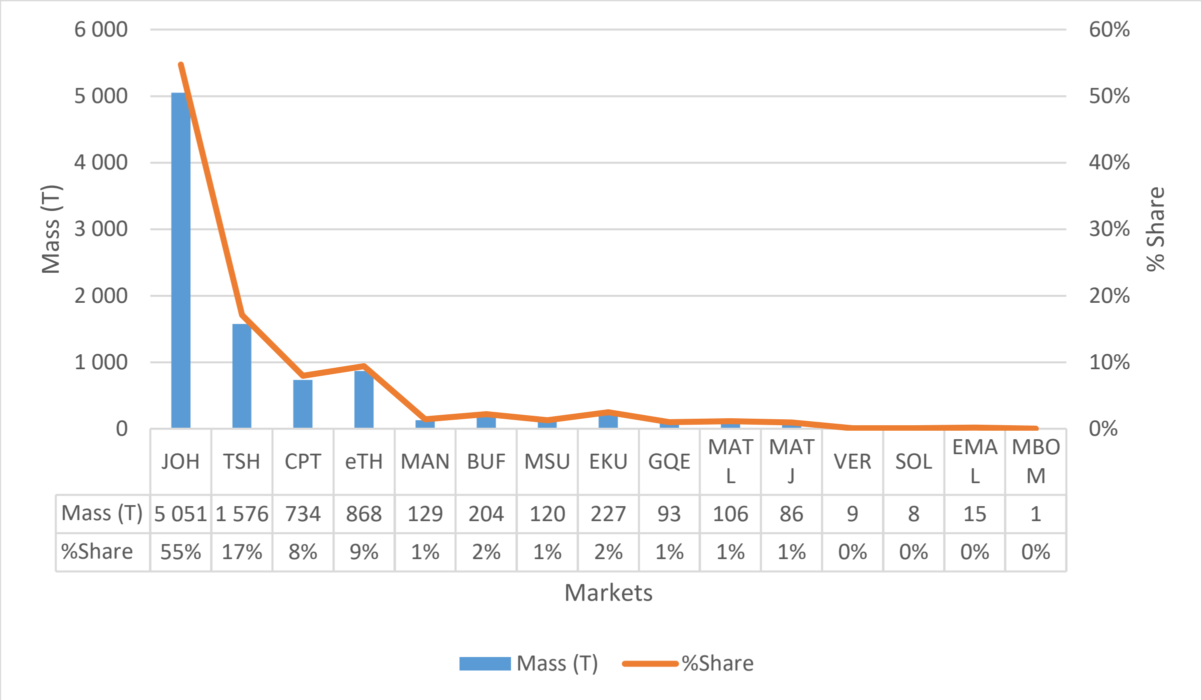


	GP	KZN	WC	EC	FS	NW	MP	NC
REVENUE (R)	R56 035	R9 189	R6 797	R3 190	R2 151	R920 73	R137 33	R75 189
MASS (T)	6863	988	734	296	215	106	17	8

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

Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 6,** the estimated share of smallholder farmers'top 10 markets by mass for onions during August 2023 is presented. The results indicate that the Johannesburg market commanded the largest share of smallholder farmers at 5 051 MT (55%). This was followed by Tshwane at 1 576 MT (17%), eThekwini at 868 MT (9%), Cape Town at MT 734 (8%). While other markets including Ekurhuleni (227 MT) and Buffalo city (204 MT), were at 2% each. On the other hand, Mangaung (129 MT), Msunduzi (120 MT), Matlosana (106 MT), Qqeberha (93 MT) and Matjhabeng (86 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	MAT L	MAT J	VER	SOL	EMA L	MBO M
Mass (T)	5 051	1 576	734	868	129	204	120	227	93	106	86	9	8	15	1
%Share	55%	17%	8%	9%	1%	2%	1%	2%	1%	1%	1%	0%	0%	0%	0%

Figure 6: Estimated shares in top 10 markets by mass for onions, August 2023
Source: DALRRD, 2023 & SAUFM,2023

Based on Figure 7, the estimated share of smallholder farmers by revenue in onions for top 10 markets is presented. The Johannesburg led at R41.30 million (53%), followed by Tshwane at R12.84 million (16%), eThekwini at R8.11 million (10%), Cape Town at R6.80 million (9%), and Buffalo City R2.16 million (3%). Mangaung (R1.36 million) and Ekurhuleni (R1.83 million) had the same share at 2% each. While, Msunduzi (R1.08 million), Gqeberha (R1.03), Matlosana (R0.92 million) and Matjhabeng (R0.79 million) commanded the least revenue share of smallholder farmers in onions among the top ten at 1% each.

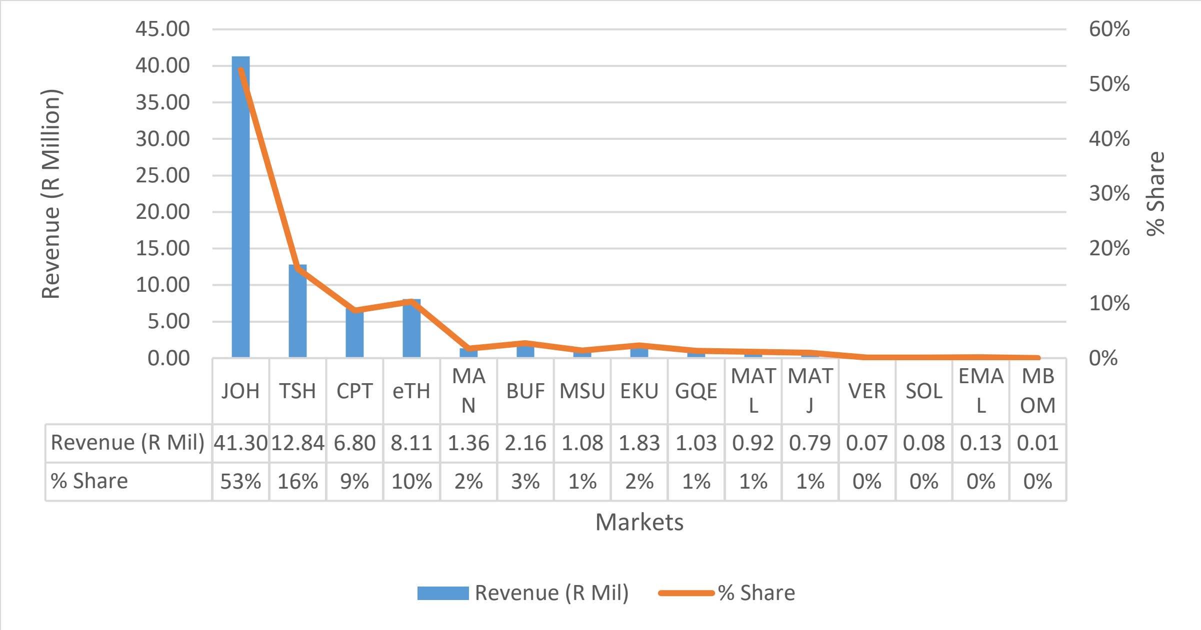


Figure 7: Estimated shares in revenue by top 10 markets for onions, August 2023
Source: DALRRD, 2023 & SAUFM,2023

3.3 TOMATOES

Based on **Figure 8,** the estimated revenue and mass for smallholder farmers in eight provinces of South Africa for tomatoes is presented. GP was the leading province at R31.8 million in revenue derived from a total mass of 5 400 MT, followed by WC at R6.1 million (959 MT), KZN at R4.1 million (641 MT), FS at R2.6 million (384 MT), EC at R1.7 million (241 MT), NW at R1 million (160 MT) and NC at R 248 861 (48 MT). MP province was at R 122 335 (21 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 R47.8 million and 7 856 MT, respectively.

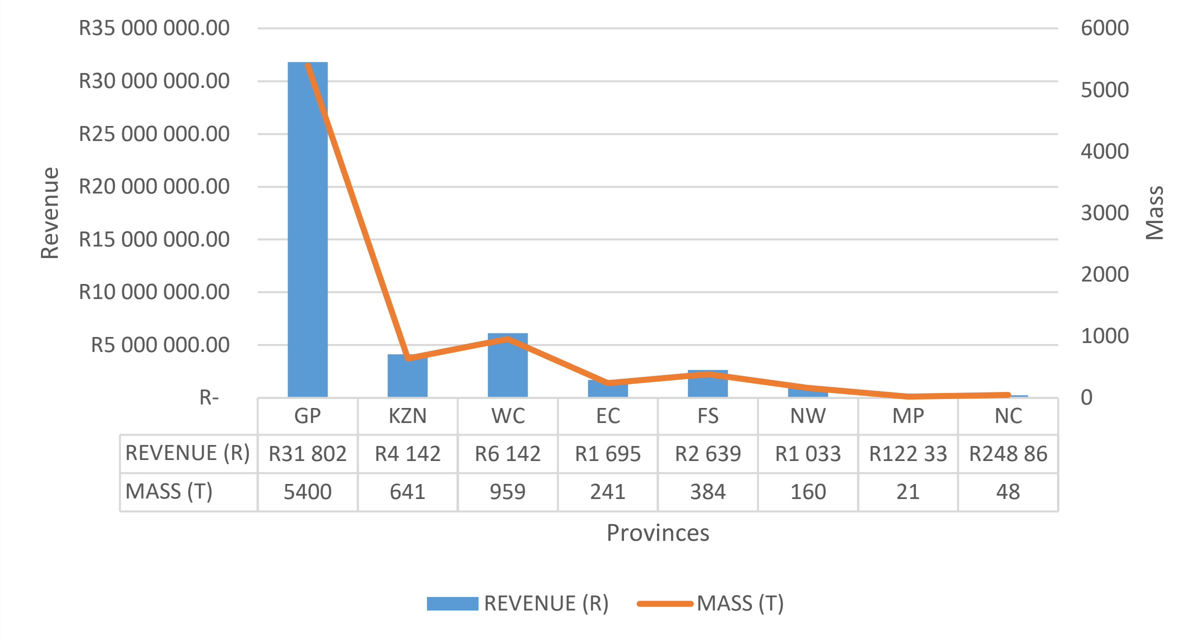
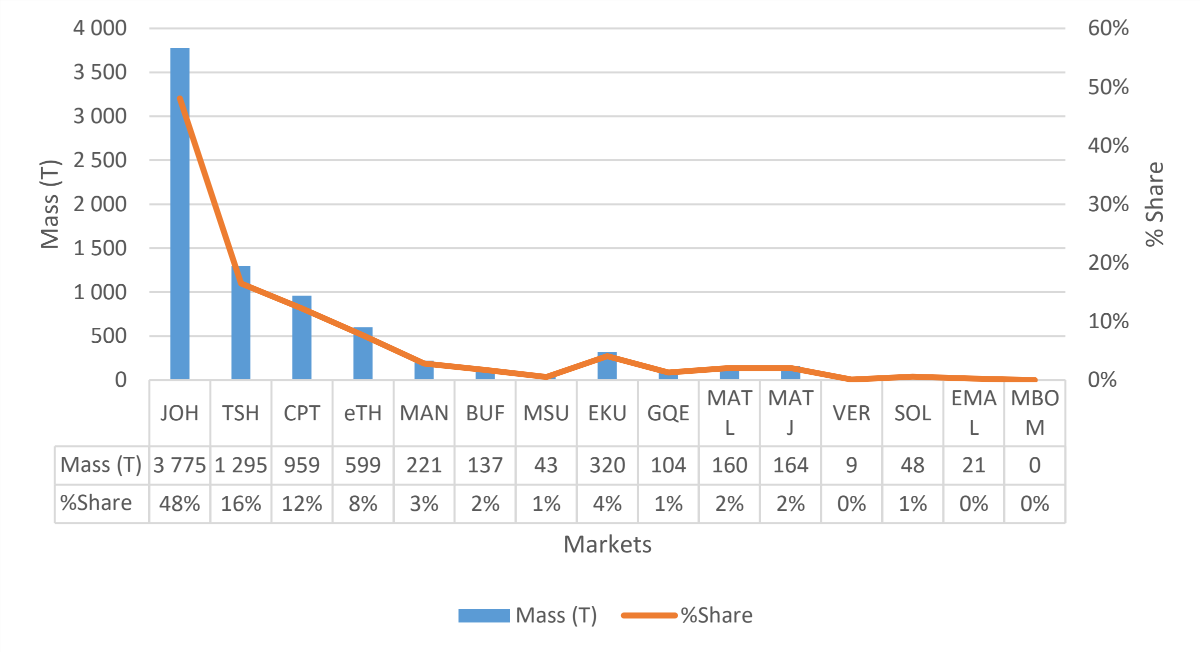


Figure 8: Summary of estimated revenue and mass of smallholder farmers in tomatoes at provincial level, August 2023

Source: DALRRD, 2023 & SAUFM,2023

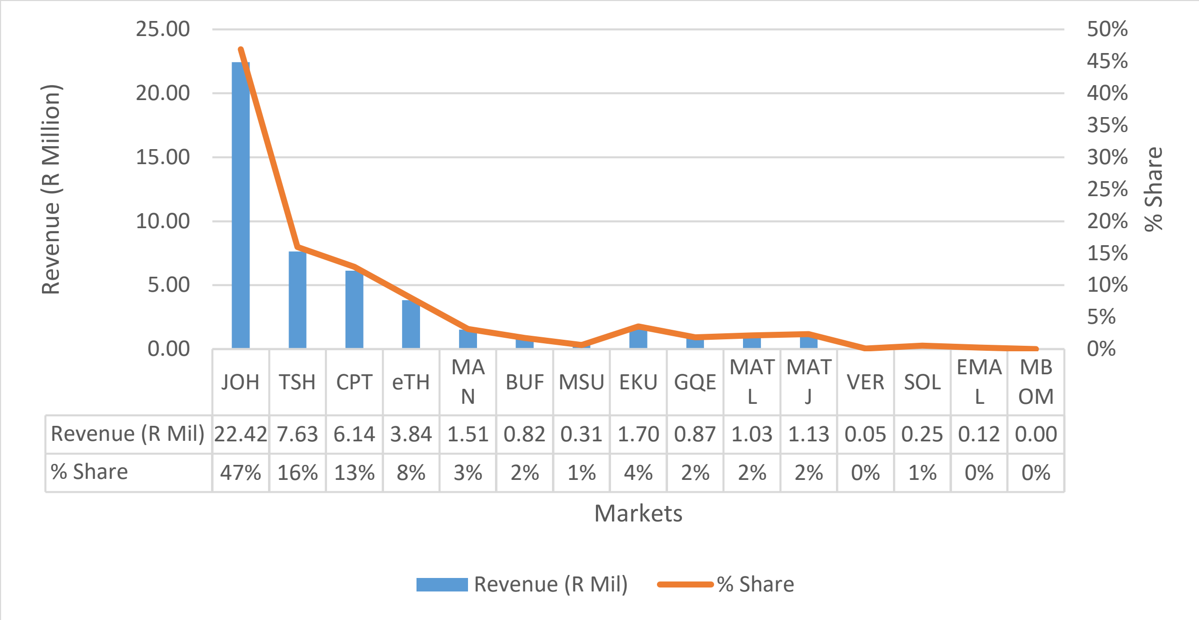
Based on **Figure 9,** the estimated share of top 10 markets by mass for tomatoes during August 2023 is presented. Tomatoes were the second largest traded commodity in terms of mass at fresh produce markets in August 2023. The Johannesburg Market commanded the largest share of smallholder farmers at 48% (3 775 MT). This market was followed by Tshwane at 1 295 MT (16%), Cape Town at 959 MT (12%), eThekwini at 599 MT (8%), Ekurhuleni at 4% (320 MT), Mangaung at 3% (221 MT), while Matjhabeng (164 MT) and Matlosana (160 MT) presented a percentage share of 2% each. In addition, other markets among the top ten including Buffalo City (137 MT), Gqeberha (104 MT) Sol Plaatjie (48 MT), Msunduzi (43 MT) presented a 1 % share each.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MAT L	MAT J	VER	SOL	EMA L	MBO M
Mass (T)	3 775	1 295	959	599	221	137	43	320	104	160	164	9	48	21	0
%Share	48%	16%	12%	8%	3%	2%	1%	4%	1%	2%	2%	0%	1%	0%	0%

Figure 9: Estimated share in top 10 markets by mass for tomatoes, August 2023
Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 10**, the estimated share of smallholder farmers by revenue generated from tomatoes for top 10 markets, measured in percentages is presented. Leading the list of the top 10 markets was Johannesburg at 47% (R22.42 million), followed by Tshwane at 16% (R7.63 million), Cape Town at 13% (R6.14 million), eThekwini at 8% (R3.84 million), Ekurhuleni at R1.70 million (4%), and Mangaung at 3% (R1.51 million). On the other hand, Matjhabeng (R1.13 million), Matlosana (R1.03 million), Gqeberha (R0.87 million) and Buffalo City (R0.82 million) all had 2% market share each. While Msunduzi (0.31 million) and Sol Plaatjie (0.25) indicated were sitting at 1% each.

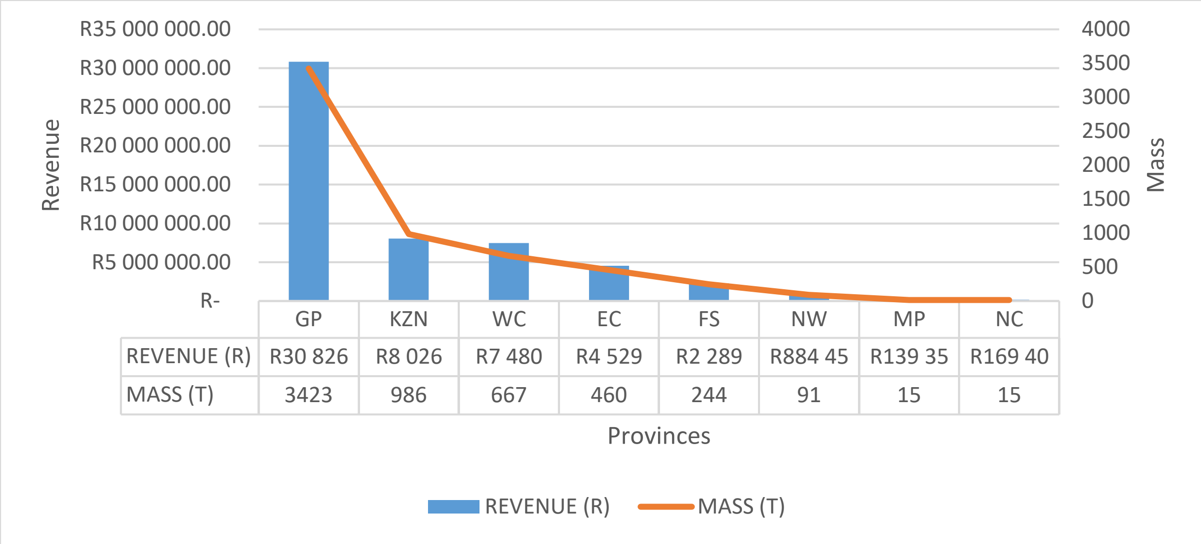


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM
Revenue (R Mil)	22.42	7.63	6.14	3.84	1.51	0.82	0.31	1.70	0.87	1.03	1.13	0.05	0.25	0.12	0.00
% Share	47%	16%	13%	8%	3%	2%	1%	4%	2%	2%	2%	0%	1%	0%	0%

Figure 10: Estimated share in revenue by top 10 markets for tomatoes, August 2023
Source: DALRRD, 2023 & SAUFM,2023

3.4 BANANAS

Based on **Figure 11,** the estimated revenue and mass of smallholder farmers for bananas in eight provinces of South Africa is presented. GP was the leading province with R30.8 million derived from a total mass of 3 423 MT, followed by KZN at R8 million (986 MT), WC at R7 million (667 MT), EC at R4.5 million (460 MT), FS at R2.2 million (244 MT) and NW at R884 458 (91 MT). The revenue of smallholder farmers for bananas in NC was estimated at R169 402 (15 MT) while MP had the lowest estimated revenue of smallholder farmers in banana at R139 355 (15 MT) over the reported month. The estimated overall share of smallholder farmers in revenue and mass for bananas were R54 million and 5 901 MT, respectively.

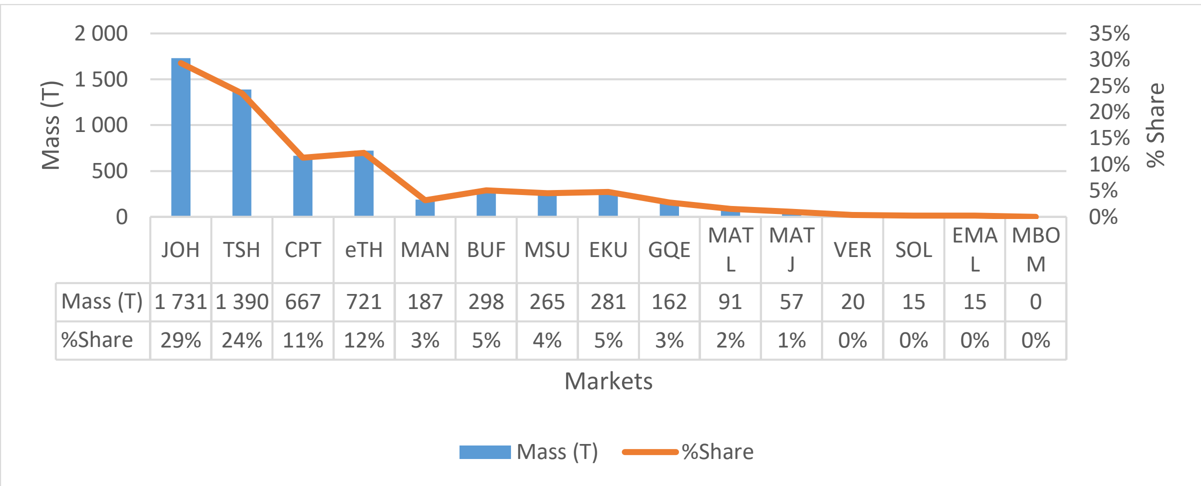


	GP	KZN	WC	EC	FS	NW	MP	NC
REVENUE (R)	R30 826	R8 026	R7 480	R4 529	R2 289	R884 45	R139 35	R169 40
MASS (T)	3423	986	667	460	244	91	15	15

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

Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 12**, the estimated share of top 10 markets by mass for bananas during August 2023 is presented. Bananas constituted the most traded fruit in the fresh produce market system during the period. By mass, the Johannesburg Market commanded the largest share of smallholder farmers at 29 % (1 731 MT). This was followed by Tshwane at 24% (1 390 MT), eThekwini at 12% (721 MT) and Cape Town at 11% (667 MT). On the other side, Buffalo City (298 MT) and Ekurhuleni (281 MT) were both standing at 5% each. The Msunduzi Market stood at 4% (265 MT), while Gqeberha (162 MT) and Mangaung (187 MT) both stood at 3%.

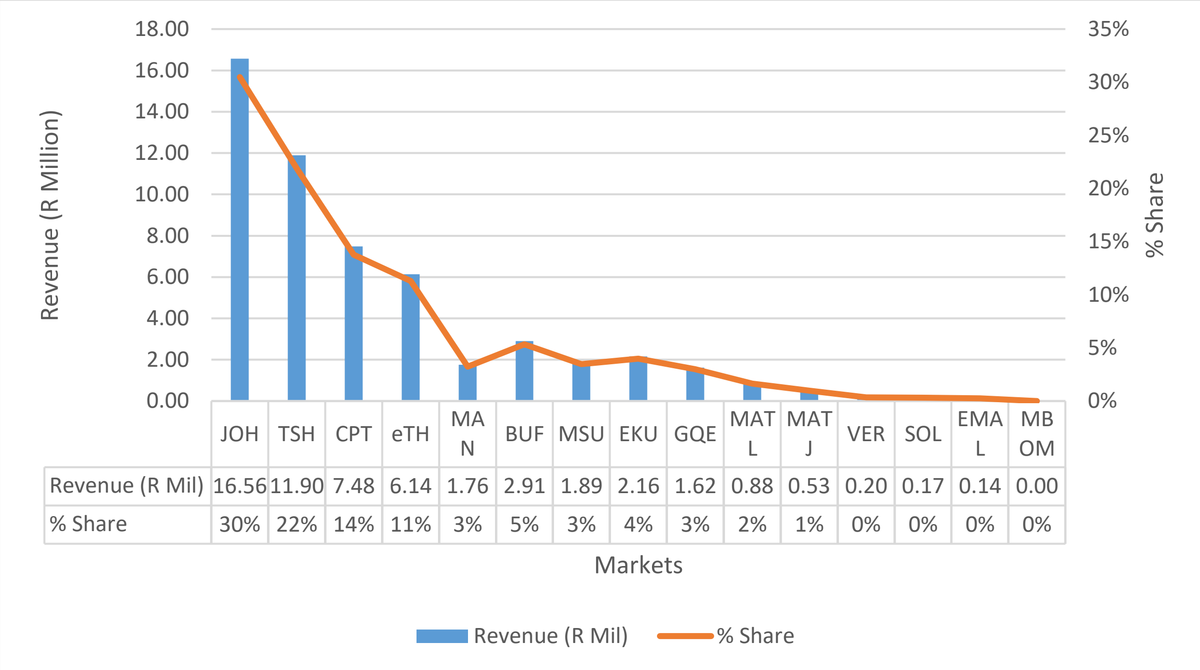


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM
Mass (T)	1 731	1 390	667	721	187	298	265	281	162	91	57	20	15	15	0
%Share	29%	24%	11%	12%	3%	5%	4%	5%	3%	2%	1%	0%	0%	0%	0%

Figure 12: Estimated shares in top 10 markets by mass for bananas, August 2023

Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 13,** the estimated share of smallholder farmers by revenue in bananas for top 10 markets, measured in percentages is presented. Leading the list of the top 10 markets was Johannesburg at 30% (R16.5 million), followed by Tshwane at 22% (R11.9 million), Cape Town at 14% (R7.4 million), eThekwini at 11% (R6 million), Buffalo City at 5% (R2.9 million) and Ekurhuleni at 4% (R2 million). The Matjabeng Market had the least share of 1% (R0.53 million).

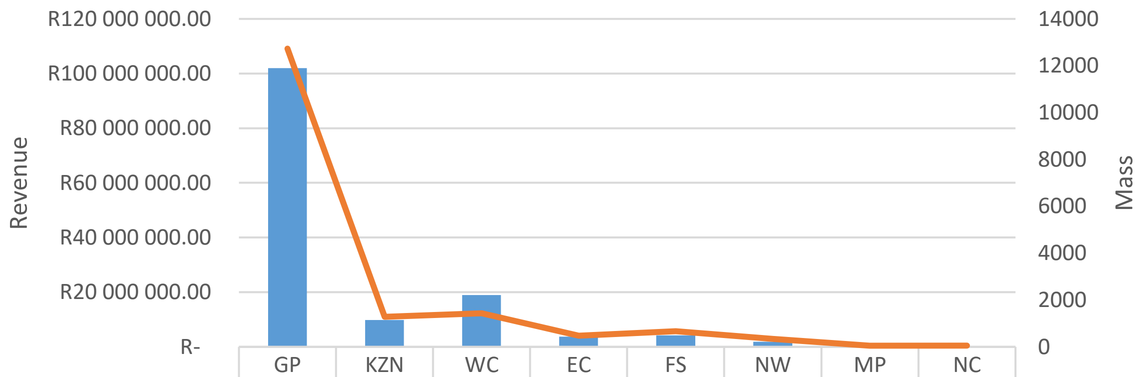


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM
Revenue (R Mil)	16.56	11.90	7.48	6.14	1.76	2.91	1.89	2.16	1.62	0.88	0.53	0.20	0.17	0.14	0.00
% Share	30%	22%	14%	11%	3%	5%	3%	4%	3%	2%	1%	0%	0%	0%	0%

Figure 13: Estimated shares revenue by in top 10 markets for bananas, August 2023
Source: DALRRD, 2023 & SAUFM,2023

3.5 OTHER VEGETABLES

Based on **Figure 14**, other vegetables estimated revenue and mass from smallholder farmers in eight provinces in South Africa is presented. GP was the leading province with revenue of R101 million derived from a total mass of 12 731 MT. This market was followed by WC at R19 million (1 430 MT), KZN at R9.7 million (1 283 MT), FS at R4 million (662 MT), EC at R3.7 million (476 MT), and NW at R1.8 million (337 MT). The MP had a lowest estimated revenue of other vegetables at R0.2 million (49 MT). The overall revenue and mass of smallholder farmers in other vegetables in August 2023 was R140 million and 17 021 MT, respectively.

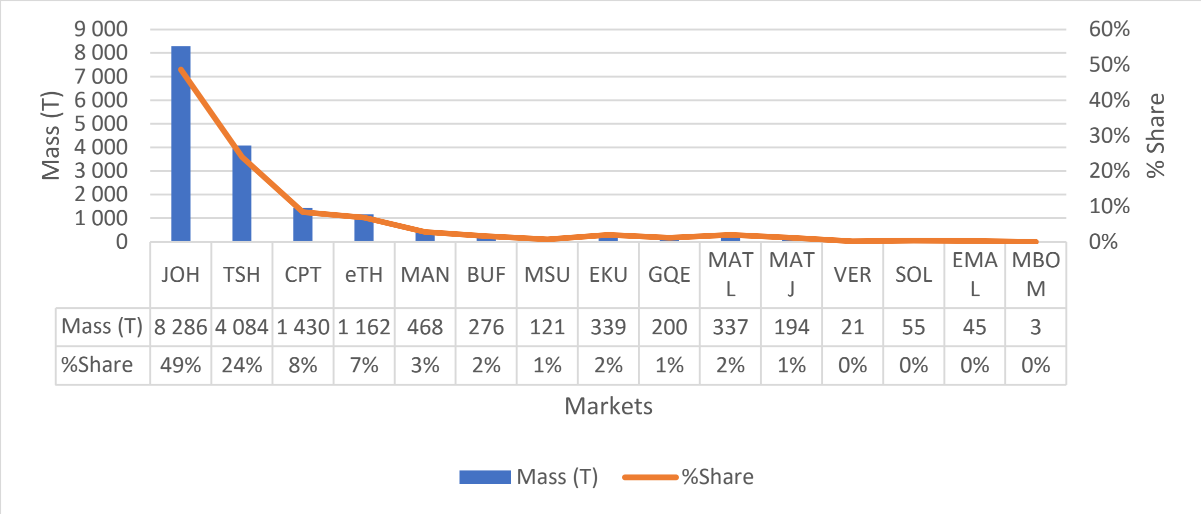


	GP	KZN	WC	EC	FS	NW	MP	NC
REVENUE (R)	R101 9	R9 765	R18 89	R3 771	R4 231	R1 837	R213 9	R235 8
MASS (T)	12731	1283	1430	476	662	337	49	55

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

Source: DALRRD, 2023 & SAUFM,2023

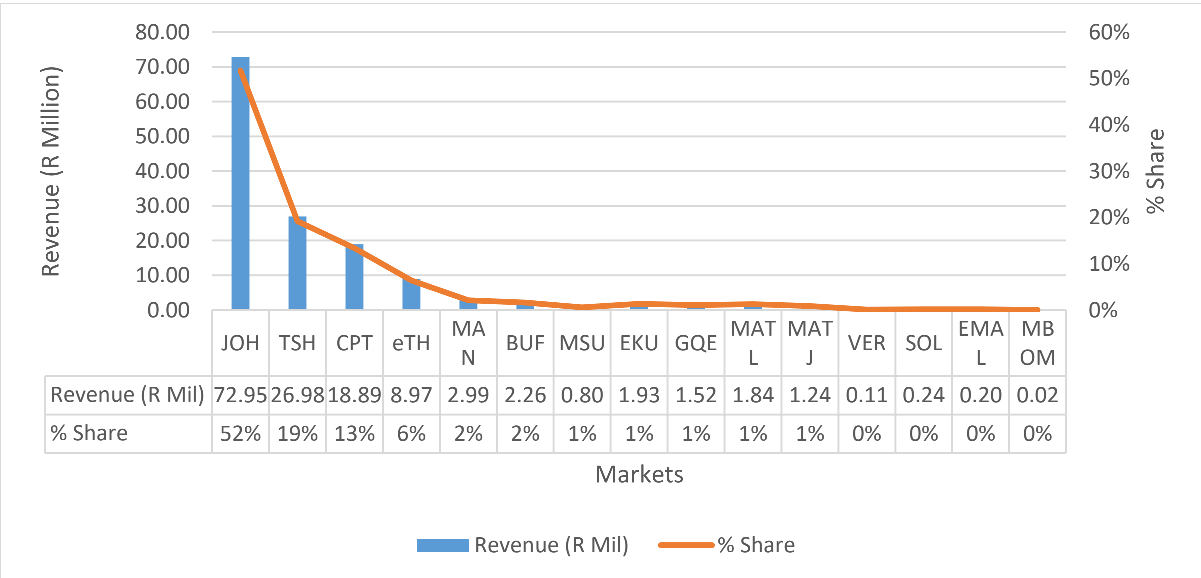
Based on **Figure 14**, market shares for smallholder farmers by mass in other vegetables traded in the various fresh produce markets in August 2023 is presented. The Johannesburg Market commanded the largest share at 49% (8 286 MT), followed by Tshwane at 24 % (4 084 MT), Cape Town at 8% (1 430 MT), eThekwini at 7% (1 162 MT), Mangaung at 3% (468 MT), Ekurhuleni (339 MT) and Matlosana (337 MT) both at 2%. While, Gqeberha (200 MT), Matjabeng (194 MT) and Msunduzi (121 MT), stood at 1% each.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM
Mass (T)	8 286	4 084	1 430	1 162	468	276	121	339	200	337	194	21	55	45	3
%Share	49%	24%	8%	7%	3%	2%	1%	2%	1%	2%	1%	0%	0%	0%	0%

Figure 15: Estimated shares in top 10 markets by mass for other vegetables, August 2023
Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 16**, the estimated share of smallholder farmers by revenue in other vegetables for top 10 markets, measured in percentages is presented. 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) and eThekwini at 7% (R7 million). On the other hand, Mangaung (R2.6 million), Buffalo City (R1.3 million) and Ekurhuleni (R1.8 million) all stood at 2% share each. While, the Matlosana (R1.56 million), Gqeberha (R1.36 million), Matjhabeng (R1 million) markets all stood at 1% share each.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM
Revenue (R Mil)	72.95	26.98	18.89	8.97	2.99	2.26	0.80	1.93	1.52	1.84	1.24	0.11	0.24	0.20	0.02
% Share	52%	19%	13%	6%	2%	2%	1%	1%	1%	1%	1%	0%	0%	0%	0%

Figure 16: Estimated shares in revenue by markets for other vegetables, August 2023
Source: DALRRD, 2023 & SAUFM,2023

3.6 OTHER FRUITS

Based on **Figure 17**, the estimated revenue and mass from smallholder farmers for other fruits in eight provinces of South Africa during August 2023 is presented. 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.

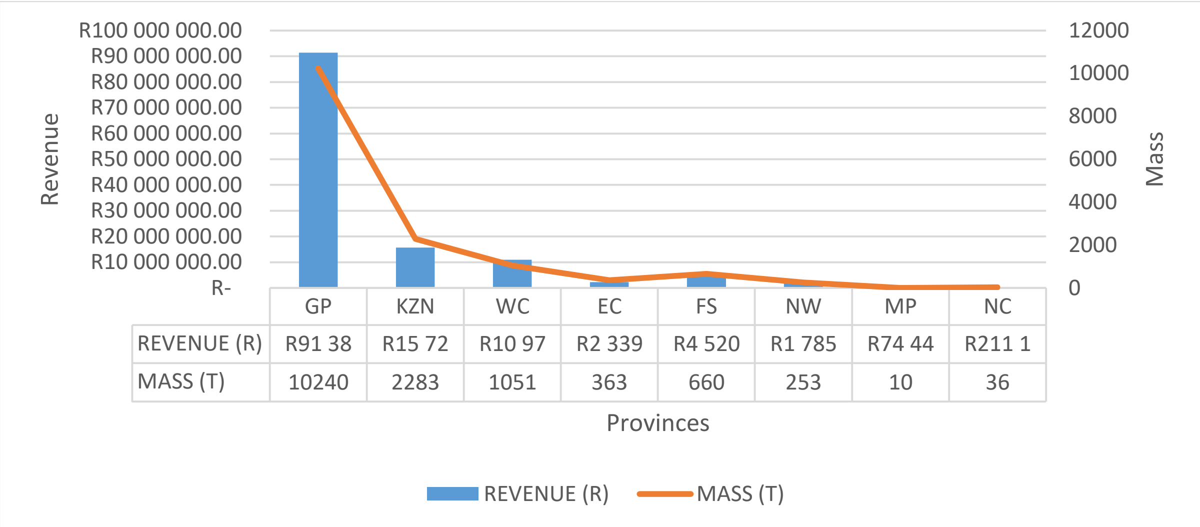
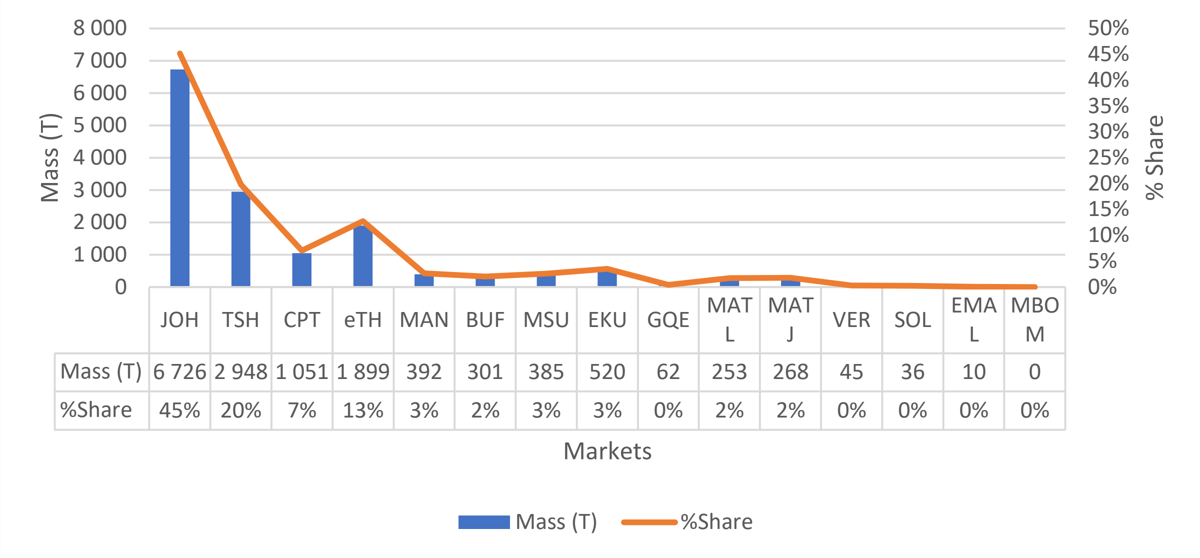


Figure 17: Summary of estimated revenue and mass of smallholder farmers in other fruits at provincial level, August 2023
Source: DALRRD, 2023 & SAUFM,2023

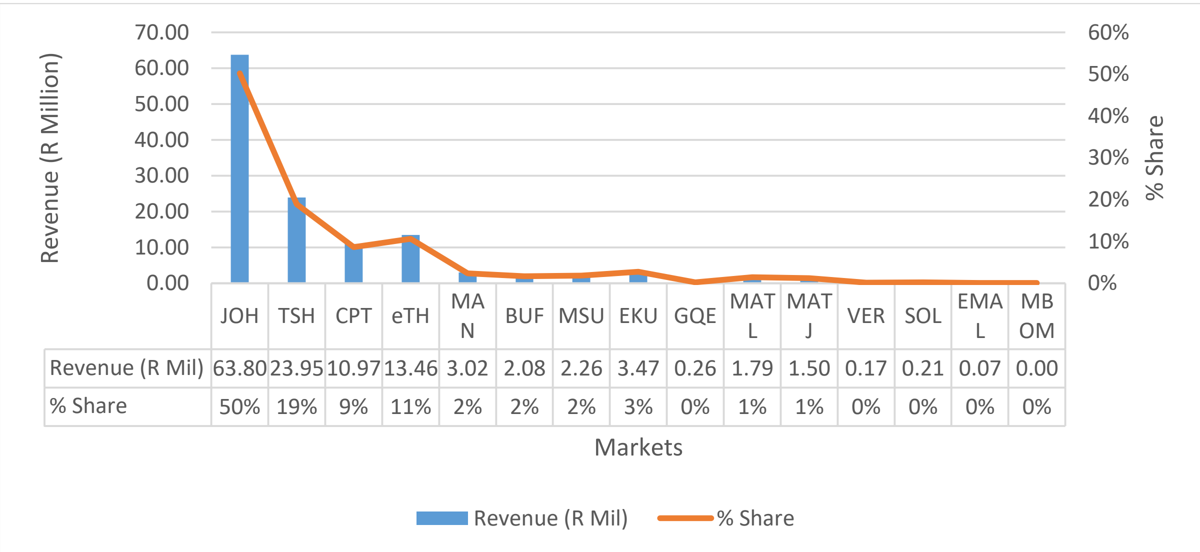
Based on Figure 18, market shares by mass for other fruits traded in the various fresh produce markets is presented. The Johannesburg Market commanded the largest share of smallholder farmers at 43% (5 969 MT), followed by Tshwane at 21% (2 973 MT), eThekwini at 13% (1 820 MT), Cape Town at 7% (1 027 MT), Ekurhuleni at 4% (503 MT) and Mangaung (438 MT) at 3%. Msunduzi (342 MT). Furthermore, 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
Mass (T)	6 726	2 948	1 051	1 899	392	301	385	520	62	253	268	45	36	10	0
%Share	45%	20%	7%	13%	3%	2%	3%	3%	0%	2%	2%	0%	0%	0%	0%

Figure 18: Estimated shares in top 10 markets by mass for other fruits, August 2023
Source: DALRRD, 2023 & SAUFM,2023

Based on **Figure 19**, the estimated share by revenue in other vegetables for top 10 markets, measured in percentages are presented. 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). On the other hand, 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.

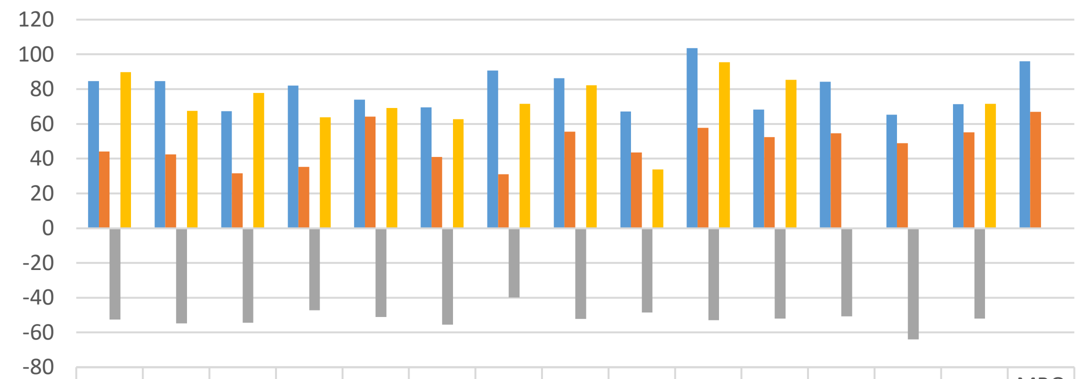


	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM
Revenue (R Mil)	63.80	23.95	10.97	13.46	3.02	2.08	2.26	3.47	0.26	1.79	1.50	0.17	0.21	0.07	0.00
% Share	50%	19%	9%	11%	2%	2%	2%	3%	0%	1%	1%	0%	0%	0%	0%

Figure 19: Estimated shares in revenue by top 10 markets for other fruits, August 2023
Source: DALRRD, 2023 & SAUFM,2023

3.7 PRICES

Based on **Figure 20,** price changes measured in percentages for the top four agricultural commodities by fresh produce market, comparing August 2022 and August 2023 is presented. Over the study period, potatoes showed significant growth in prices especially in Matlosana, Mbombela, Msunduzi, Ekurhuleni, Johannesburg, and eThekwini markets and an average increase of 75% was reported. On the other hand, prices for onions displayed the upward growth during the period under review and averaged at 45% increase in all the markets. Prices for tomatoes decreased in all the markets during the period under review and the decrease averaged at 45%. Finally, prices for bananas by market exhibited a moderate upward trend during the period under review with an average of 54%. The observed increases in the prices for potatoes, onions and bananas support the earlier observation 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 of 53% in the prices for tomatoes across all the markets during the period under review followed by an increase of 54 % in the total tomatoes mass traded at the NFPM during the same period.



	JOH	TSH	CPT	eTH	MAN	BUF	MSU	EKU	GQE	MATL	MATJ	VER	SOL	EMAL	MBOM
Potatoes	85	85	67	82	74	70	91	86	67	104	68	84	65	71	96
Onions	44	42	32	35	64	41	31	56	44	58	52	55	49	55	67
Tomatoes	-53	-55	-54	-47	-51	-56	-40	-52	-48	-53	-52	-51	-64	-52	0
Bananas	90	67	78	64	69	63	72	82	34	95	85	0	0	72	0

Figure 20: Price trends for top four traded agricultural products in August 2023
Source: DALRRD, 2023 & SAUFM,2023

4. CONCLUSION

The purpose of this report was to track market access for smallholder farmers in NFPM 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 August 2023 the total mass traded from the NFPM 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 (translated as 68%) matched by a revenue of R407 million (interpreted as 68 %). This was followed by KZN at 9 046 MT (R69 million), WC at 7 006 MT (R63 million), Free State at 3285 MT (R23.5 million), EC at 3 070 MT (R25 million), NW at 1 451MT (R10 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 122MT (R109 million), Cape Town at 7 006 MT (R63 million), eThekwini at 7 547 MT (R58 million), Ekurhuleni at 2 816MT (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).

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 Msunduzi, Mbombela, Emalahleni, Matlosana, Ekurhuleni and eThekwini markets. Prices for onions displayed the upward growth during the period under review and averaged at 43 % increase in all the markets. Finally, prices for bananas by market displayed a moderate upward trend during the period under review.

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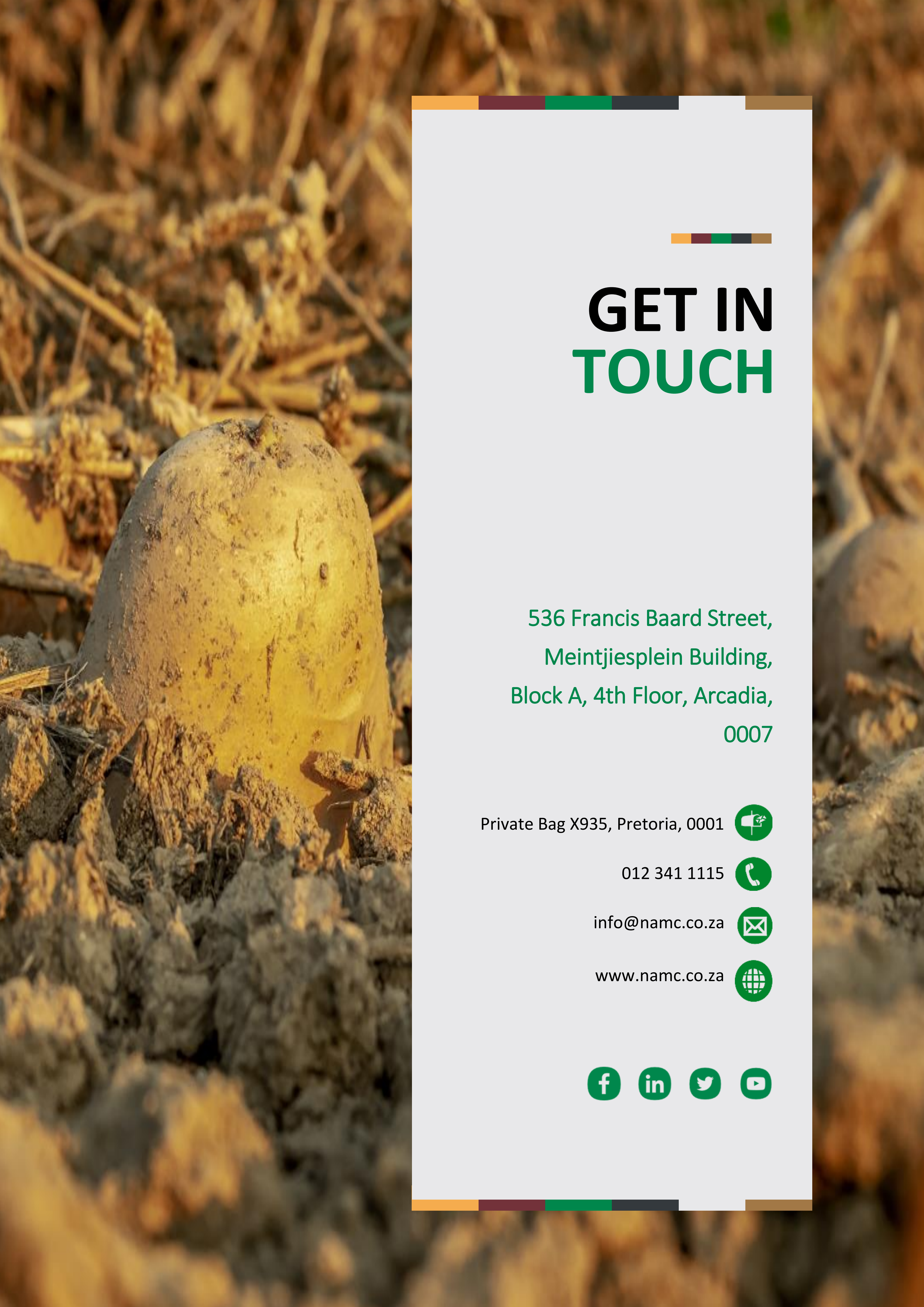

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