



SMALLHOLDER MARKET ACCESS ESTIMATES

September 2023

***National Agricultural
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ABBREVIATIONS

- CT Cape Town
- JHB Johannesburg
- TSH Tshwane
- NFPM National Fresh Produce Market

1. BACKGROUND

This report evaluates the estimated performance achieved by smallholder farmers within the National Fresh Produce Markets (NFPM) in South Africa during September 2023. The assessment aligns with the recommendation of the NAMC's Section 7 Committee Report on Fresh Produce Markets, which stipulates that black commission market agents should facilitate 30% of the volume traded in such markets. The analysis focuses on 16 NFPMs. The primary focus of the analysis is on the top 20 performing fruits and vegetables sold across 16 NFPMs. The decision to concentrate on the top 20 fruits and vegetables across 16 NFPMs is that they account for approximately 97% of the total volume traded and 97% of the revenue generated in NFPMs. However, more information is limited to three fruits (apples, avocados, and bananas) and vegetables (onions, tomatoes, and potatoes) since they account for approximately 62% of the total revenue and 60% of the total volume. The data used in this report were obtained from the Department of Agriculture, Land Reform and Rural Development (DALRRD).

2. OVERVIEW OF THE MONTH – SEPTEMBER 2023

This report provides a comprehensive overview of 16 NFPMs, as presented in **Table 1**. The total value of vegetables sold during the period under review amounted to R1.525 billion, representing a marginal decrease of 0.8% compared to August 2023. Furthermore, the total volume of vegetables sold in September 2023 was 182 461 tons, reflecting a decline of 8.7% from the previous month. Regarding fruits, the total value of fruits sold in September was R582.11 million, which translates to a 3.7% decrease from August 2023. Additionally, the total volume of fruits sold in September 2023 was 54 606 tons, which indicates a significant decline of 21% from the previous month. The estimated market share of smallholders for vegetables and fruits in September 2023 constituted revenue of R457.70 million of the total market for vegetables and R174.63 million of the total market for fruits.

Table 1: Distribution of FPMs value and volume of fruits and vegetables

Market	Vegetables (Rands)	Vegetables (Tons)	Fruits (Rands)	Fruits (Tons)
1. Johannesburg	719 446 658	86 658	268 792 644	23 452
2. Tshwane	272 915 912	35 645	117 631 431	11 272
3. Cape Town	154 924 999	14 985	58 409 955	5 208
4. Durban	132 972 785	15 708	54 460 224	5 575
5. Springs	52 385 476	6 536	16 138 939	1 856
6. Bloemfontein	36 549 814	4 597	14 629 343	1 443
7. East London	35 862 310	4 148	16 106 465	1 586
8. Klerksdorp	29 622 604	3 629	79 85 511	9 68
9. Welkom	26 326 255	3 102	7 139 532	905
10. Pietermaritzburg	20 249 156	2 363	11 925 250	1 418
11. Port Elizabeth	19 944 791	2 324	6 235 268	599
12. Vereeniging	6 614 160	677	432 064	86
13. Nelspruit	5 547 279	593	246 560	22
14. Witbank	4 791 185	578	540 395	58
15. George	4 300 532	449	122 474	16
16. Kimberley	3 210 079	467	1 316 851	143
Total September 2023	1 525 663 992	182 461	582 112 906	54 606
Total August 2023	1 537 502 917	199 875	604 543 204	69 322
Smallholder Market	457 699 198	54 738	174 633 872	16 382
% Change from Aug to Sept 2023	-0.8%	-8.7%	-3.7%	-21%

Source: DALRRD (2023)

3. VEGETABLES– SEPTEMBER 2023

Table 2 presents the top 20 performing vegetables in 16 NFPs. Regarding the smallholder market (30% share) estimates for vegetables, potatoes are the top-performing vegetable, with a 48% share of the total market value, amounting to R218 353 117. Potatoes also dominate in volume, contributing 40% of the total volume at 21 854 tons.

Table 2 Top 20 performing vegetables across 16 NFPs.

Vegetables	Value (Rands)	30% Share value	Tons	30% Share Volume
Potatoes	727 843 724	218 353 117	72 848	21 854
Onions	199 142 611	59 742 783	30 788	9 237
Tomatoes	166 754 659	50 026 398	22 234	6 670
Peppers	90 315 097	27 094 529	4 151	1 245
Butternut squashes	48 674 653	14 602 396	4 891	1 467
Carrots	47 756 067	14 326 820	11 414	3 424
Cabbage	31 260 675	9 378 202	15 808	4 742
Pumpkins	24 923 476	7 477 043	2 669	801
English cucumbers	21 817 501	6 545 250	1 531	459
Beetroot	17 061 754	5 118 526	3 957	1 187
Lettuce	14 437 287	4 331 186	2 025	607
Chillies	14 035 195	4 210 559	593	178
Sweet potatoes	13 303 942	3 991 182	1 748	524
Green beans	9 937 068	2 981 120	738	221
Baby marrows	9 310 677	2 793 203	324	97
Broccoli	9 109 155	2 732 747	351	105
Cauliflower	8 435 171	2 530 551	325	97
Hubbard squashes	8 213 054	2 463 916	916	275
Ginger	7 891 844	2 367 553	138	41
Sweetcorn	7 721 420	2 316 426	161	48
Other vegetables	47 718 963	14 315 689	4 850	1 455
TOTAL	1 525 663 992	457 699 198	182 461	54 738

Source: DALRRD (2023)

Onions are second, with a 13% share in market value, amounting to R59 742 783, and a 17% share in volume, amounting to 9 237 tons. Tomatoes take the third position, contributing 11% to the market value, amounting to R50 026 398, and 12% to the volume of 6 670 tons. Peppers hold a 6% market value share, equivalent to R27 094 529 and a 2% volume share, amounting to 1 245 tons. Butternut squashes account for 3% of market value, with R14 602 396 and 3% of the total volume, equal to 1 467 tons. Carrots, cabbage, and beetroots contribute to the market with varying value and volume shares. Other vegetables represent a 3% share in both value and volume, with a value of R14 315 689 and a volume of 1 455 tons.

Table 3 presents the distribution of the top three vegetables (onions, potatoes, and tomatoes) across 16 NFPs. Looking at the smallholder market (30% share) estimates across NFP, Johannesburg has the highest market share for onions in volume (4 866 tons) and value (R29 533 305). Durban, Cape Town, and Tshwane also

play significant roles in the onion market, with significant shares in both volume and value. Conversely, regions such as Bloemfontein, East London, Kimberley, Klerksdorp, Nelspruit, Pietermaritzburg, Port Elizabeth, Springs, Welkom, and Witbank have relatively small market shares for onions.

Table 3: Distribution of top three vegetables across 16 NFPMs

Vegetables	NFPM	Value(Rand)	30% Share Value	Volume(Tons)	30% Share Volume
ONIONS	Johannesburg	98 444 349	29 533 305	16 219	4 866
	Tshwane	31 640 479	9 492 144	5 469	1 641
	Durban	22 856 354	6 856 906	3 117	935
	Cape Town	18 054 224	5 416 267	2 234	670
	Springs	4 204 653	1 261 396	712	214
	East London	6 099 007	1 829 702	674	202
	Bloemfontein	3 503 660	1 051 098	492	148
	Port Elizabeth	3 908 090	1 172 427	427	128
	Pietermaritzburg	3 004 323	901 297	386	116
	Klerksdorp	2 423 058	726 917	345	103
	Welkom	2 341 134	702 340	331	99
	Nelspruit	997 477	299 243	153	46
	Witbank	534 936	160 481	76	23
	Kimberly	403 012	120 904	60	18
	George	465 479	139 644	53	16
	Vereeniging	262 378	78 713	40	12
POTATOES	Johannesburg	315 028 216	94 508 465	31 705	9 512
	Tshwane	128 669 964	38 600 989	12 890	3 867
	Durban	67 643 961	20 293 188	6 585	1 976
	Cape Town	62 489 553	18 746 866	5 986	1 796
	Springs	37 339 143	11 201 743	3 800	1 140
	East London	21 334 540	6 400 362	2 259	678
	Bloemfontein	19 375 458	5 812 637	1 940	582
	Klerksdorp	18 460 446	5 538 134	1 807	542
	Welkom	16 791 007	5 037 302	1 735	520
	Pietermaritzburg	14 024 249	4 207 275	1 482	445
	Port Elizabeth	9 541 272	2 862 382	978	293
	Vereeniging	5 987 032	1 796 110	577	173
	Nelspruit	4 173 507	1 252 052	396	119
	Witbank	3 399 553	1 019 866	339	102
	George	2 720 210	816 063	268	80
	Kimberly	865 613	259 684	101	30
TOMATOES	Johannesburg	80 860 978	24 258 293	10 639	3 192
	Tshwane	27 967 174	8 390 152	3 688	1 106
	Cape Town	19 711 799	5 913 540	2 522	756
	Durban	12 962 349	3 888 705	1 761	528
	Springs	5 103 292	1 530 988	913	274
	Bloemfontein	5 029 431	1 508 829	667	200
	Welkom	3 587 206	1 076 162	473	142
	Klerksdorp	3 302 502	990 751	466	140
	East London	2 544 122	763 236	351	105
	Port Elizabeth	2 778 252	833 476	339	102
	Kimberly	958 532	287 560	148	44
	Pietermaritzburg	995 927	298 778	127	38
	George	566 302	169 891	83	25
	Witbank	251 220	75 366	37	11
	Vereeniging	81 949	24 585	17	5
	Nelspruit	53 625	16 088	5	2

Source: DALRRD (2023)

In terms of potatoes, Johannesburg FPM maintains its dominance with the highest volume market share (9 512 tons) and value (R 94 508 465), followed by Tshwane FPM. Durban and Cape Town FPMs have significant shares in both volume and value, while FPMs such as George, Kimberly, Klerksdorp, and Vereeniging have comparatively lower market shares for potatoes. Concerning tomatoes, Johannesburg emerges as the dominant NFPM, contributing significantly to the volume and value of tomatoes with 3 192 tons and R24 258 293, respectively. Tshwane follows, indicating a substantial market presence with 1 106 tons and a R8 390 152 value. Cape Town and Durban also play vital roles, contributing 756 tons (R5 913 540) and 528 tons (R3 888 705), respectively. These coastal cities demonstrate a significant demand for tomatoes, likely influenced by culinary culture and population density. Springs and Bloemfontein contribute 274 tons (R1 530 988) and 200 tons (R1 508 829), respectively.

4. FRUITS– SEPTEMBER 23

Table 4 illustrates the distribution of 20 performing fruits across 16 NFPMs. Regarding the smallholder market (30% share) estimates for fruits, the market for fruit on NFPMs was led by bananas, accounting for a 31% share in value, amounting to R53 317 755. Apples followed with a 21% share, worth R37 480 091. Avocados, pears, nartjies (mandarins), and oranges also held significant shares, contributing 6-7% in value to the fruit market. Strawberries, pineapples, grapes, and exotic citrus rounded out the top ten, contributing 3% to the market value.

On the other hand, several fruits have relatively low market shares in value and volume. These include a variety of fruits such as guavas, peaches, limes, plums, granadillas, mangoes, coconuts, gooseberries, pomegranates, pecan nuts, raspberries, custard apples, figs, peanuts, kumquats, litchis, almonds, apricots, cherries, macadamia nuts, prickly pears, starfruit, dragon fruit, jackfruit, and olives. These commodities have a limited presence in the market.

Table 4: Top 20 performing fruits across 16 NFPMs

Fruit	Value (Rand)	30% share value	Volume(Tons))	30% Share volume
Bananas	177 725 850	53 317 755	15 944	4 783
Apples	124 933 636	37 480 091	12 231	3 669
Avocados	42 111 741	12 633 522	2 766	830
Pears	35 390 858	10 617 257	3 526	1 058
Naartjies (mandarins)	35 308 139	10 592 442	3 702	1 111
Oranges	34 153 670	10 246 101	6 742	2 023
Strawberries	24 192 788	7 257 836	631	189
Pineapples	18 061 361	5 418 408	1 981	594
Grapes	17 332 305	5 199 692	241	72
Exotic citrus	15 793 361	4 738 008	1 749	525
Lemons	9 280 425	2 784 127	2 170	651
Watermelons	7 595 554	2 278 666	928	279
Papayas	6 815 128	2 044 539	390	117
Muskmelons	5 657 792	1 697 338	159	48
Sweet melons	5 097 076	1 529 123	165	50
Blueberries	4 282 168	1 284 650	477	143
Kiwifruit	2 987 428	896 228	36	11
Nectarines	2 432 601	729 780	67	20
Guavas	2 349 620	704 886	152	46
Grapefruit	1 880 024	564 007	296	89
Other fruits	8 731 382	2 619 415	251	75
TOTAL	582 112 906	174 633 872	54 606	16 382

Source: DALRRD (2023)

Table 5 illustrates the distribution of the top three fruits (apples, avocados, and bananas) across 16 NFPMs. Focusing on the smallholder market (30% share) estimates across NFPM, Banana sales performance across NFPMs is unevenly distributed, with Johannesburg and Tshwane emerging as the leading NFPMs.

Table 5: Distribution of top three fruits across 16 NFPMs

Fruit	Region	Value(Rand)	30% share value	Volume(Tons)	30% share volume
BANANAS	Johannesburg	56 183 577	16 855 073	4 891	1 467
	Tshwane	38 645 507	11 593 652	3 733	1 120
	Cape town	25 058 899	7 517 670	1 972	592
	Durban	18 622 712	5 586 814	1 730	519
	East London	10 241 878	3 072 563	908	272
	Bloemfontein	5 778 855	1 733 657	491	147
	Springs	5 761 965	1 728 589	609	183
	Port Elizabeth	5 559 946	1 667 984	437	131
	Pietermaritzburg	5 490 269	1 647 081	568	170
	Klerksdorp	2 920 744	876 223	302	91
	Welkom	2 416 672	725 002	218	66
	Kimberley	715 832	214 750	57	17
	Witbank	284 970	85 491	25	8
	Vereeniging	42 480	12 744	4	1
	Nelspruit	1 545	464	0	0
APPLES	Johannesburg	60 367 669	18 110 301	5 698	1 709
	Tshwane	26 441 274	7 932 382	2 545	764
	Durban	12 765 189	3 829 557	1 357	407
	Springs	6 069 207	1 820 762	633	190
	Cape town	4 452 919	1 335 876	425	128
	Bloemfontein	3 595 324	1 078 597	353	106
	East London	2 859 715	857 915	274	82
	Pietermaritzburg	2 677 251	803 175	301	90
	Klerksdorp	2 607 385	782 216	283	85
	Welkom	2 294 811	688 443	271	81
	Kimberley	269 250	80 775	30	9
	Nelspruit	245 015	73 505	22	7
	Witbank	189 980	56 994	19	6
	Vereeniging	52 856	15 857	8	2
	Port Elizabeth	43 500	13 050	12	4
	George	2 290	687	0	0
AVOCADOS	Johannesburg	20 063 960	6 019 188	1 418	425
	Cape town	11 672 438	3 501 731	568	170
	Tshwane	6 547 812	1 964 344	426	128
	Springs	918 845	275 653	95	28
	Bloemfontein	851 712	255 513	84	25
	Klerksdorp	652 313	195 694	49	15
	Durban	541 106	162 332	39	12
	Welkom	350 583	105 175	40	12
	East London	268 217	80 465	11	3
	Pietermaritzburg	119 635	35 891	23	7
	George	81 282	24 385	11	3
	Port Elizabeth	40 004	12 001	3	1
	Kimberley	2 075	623	0	0
	Witbank	1 760	528	0	0

Source: DALRRD (2023)

In terms of apples, Johannesburg holds the highest value share, amounting to R18 110 301, which translates to approximately 48.30% of the total value share for apples. Tshwane follows, contributing R7 932 382 and constituting approximately 21.16% of the total value share. Durban takes the third position with a contribution of R3 829 557, representing approximately 10.21% of the total value share. The remaining regions each exhibit varying, yet smaller, value shares. Avocados follow a similar trend across all 16 NFPMs.

5. PRICES

In September 2023, there were variances in the prices of several fruits in the major NFPMs. As presented in Table 4, the price fluctuations of the top three fresh produce markets, Tshwane, Johannesburg, and Cape Town, are illustrated for a selection of fruits, including bananas, apples, avocados, pears, and naartjie.

Table 6: Fruit prices - South Africa's major Fresh Produce Markets

TSH	FRUITS	R/ton	Price % Change (M/M)	Price % Change (Y/Y)
	Bananas	10 352	21%	-0.20
	Apples	10 388	9%	-0.13
	Avocados	15 369	11%	-0.13
	Pears	9 939	1%	-0.22
	Naartjies (mandarins)	9 000	55%	0.07
JHB	Fruits	R/ton	Price % Change (M/M)	Price % Change (Y/Y)
	Bananas	11 487	20%	-0.21
	Apples	10 594	7%	-0.15
	Avocados	14 153	11%	-0.05
	Pears	10 658	6%	-0.15
	Naartjies (mandarins)	10 424	27%	-0.04
CT	Fruits	R/ton	Price % Change (M/M)	Price % Change (Y/Y)
	Bananas	12 706	13%	-0.20
	Apples	10 471	2%	-0.13
	Avocados	20 544	-5%	-0.12
	Pears	11 014	-8%	-0.11
	Naartjies (mandarins)	6 177	23%	-0.15

Source: DALRRD (2023)

The year-over-year (Y/Y) analysis revealed a downward trend in the prices of all five performing fruits across all three markets. Month-over-month (M/M) comparisons indicated a decline in the prices of avocados (5%) and pears (8%) in the Cape Town fresh produce market. However, other fruits exhibited significant price increases in all three NFPMs.

Table 4 presents a fluctuation in the prices of vegetables in the top three fresh produce markets. Specifically, there was a month-to-month increase in the prices of vegetables, except peppers and onions, which experienced a decrease in price levels.

Table 7: Vegetable prices - South Africa's major Fresh Produce Markets

TSH	VEGETABLES	Price/Ton	Price % Change (M/M)	Price % Change (Y/Y)
	Peppers	18 328	-10%	-0.15
	Butternut squashes	10 660	12%	-0.10
	Potatoes	9 982	32%	-0.40
	Tomatoes	5 890	29%	0.04
	Onions	5 785	-30%	-0.28
JHB	Vegetables	September	Price % Change (M/M)	Price % Change (Y/Y)
	Peppers	21 585	-16%	-0.13
	Butternut squashes	9 728	16%	-0.27
	Potatoes	9 936	34%	-0.41
	Tomatoes	7 600	29%	-0.01
	Onions	6 069	-26%	-0.27
CT	Vegetables	September	Price % Change (M/M)	Price % Change (Y/Y)
	Peppers	29 321	-8%	-0.22
	Butternut squashes	10 660	20%	-0.26
	Potatoes	10 439	31%	-0.41
	Tomatoes	7 817	25%	-0.05
	Onions	8 080	-13%	-0.25

Source: DALRRD (2023)

In Johannesburg, peppers and onion prices declined by 10% and 30%, respectively, while in Cape Town, pepper and onions showed a decline in prices by 16% and 26%, respectively. Additionally, the data indicates that the Cape Town market exhibited a low percentage price change of pepper (8%) and onions (13%). Concerning year-to-year percentage price change, the trend is negative, with a relatively low magnitude. Vegetables such as butternut, potatoes, and tomatoes exhibited a significant increasing trend in month-to-month price change across the top three fresh produce markets.

6. CONCLUSION

This report presents the performance based on the 30% share of each traded agricultural product, as the 2006 NAMC Section 7 committee report recommends. Specifically, it provides smallholder market access estimates in the NFPMs within the context of broader transformation. The estimation for September 2023 reveals that smallholder farmers generated R457 699 197 from vegetables and R174 633 872 from fruits, indicating the positive impact of policy recommendations on fostering smallholder market access. However, there was a month-to-month decline in revenue and volume for both vegetables and fruits. Regarding the best-performing commodities, potatoes, onions, and tomatoes dominate the vegetable market, while bananas, apples, and avocados constitute more than half the market share in the fruit market. The top four performing NFPMs are Johannesburg, Tshwane, Durban, and Cape Town; while NFPMs such as George, Kimberley, Klerksdorp, and Vereeniging have relatively small market shares.

Regarding price trends, the top five fruits and vegetables showed a declining trend on year-to-year (Y/Y) percentage price change, however, with relatively small magnitudes. Month-to-month (M/M) percentage price change showed dynamic trends, including price decreases for avocados and pears in the Cape Town FPM and a significant decline in the prices of onions and peppers in Johannesburg. At the same time, butternut, potatoes, and tomatoes showed an increasing price trend in the top three NFPMs. The estimation shows a good market share for smallholder farmers. However, the prerequisite to sustain and increase the dominance of smallholder farmers in NFPMs is to address critical challenges such as insufficient finance and technical capabilities, a lack of operational knowledge, low economies of scale, low bargaining power, and inadequate infrastructure, such as limited storage facilities, and logistical issues.

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