



## SMALLHOLDER MARKET ACCESS ESTIMATES

**NOVEMBER 2023**

*National Agricultural  
Marketing Council*

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## ABBREVIATIONS

BLN	Bloemfontein
CT	Cape Town
DBN	Durban
EL	East London
JHB	Johannesburg
KDP	Klerksdorp
KIM	Kimberly
NFPM	National Fresh Produce Market
NLP	Nelspruit
PE	Port Elizabeth
PMB	Pietermaritzburg
SPR	Springs
TSH	Tshwane
UMT	Umtata
VER	Vereeniging
WBK	Witbank
WLK	Welkom

## 1. BACKGROUND

This report evaluates the estimated performance achieved by smallholder farmers within the National Fresh Produce Markets (NFPM) in South Africa during November 2023. The assessment aligns with the NAMC's Section 7 Committee Report on Fresh Produce Markets recommendation, stipulating 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 – NOVEMBER 2023

**Table 1** shows the comparative turnover and mass of fruits and vegetables across the NFPMs. The total market turnover amounts to R2 117 739 484.27 and the total volume sold was 252 094.23 tons. Johannesburg (JHB) is the leading market in all markets, with the highest turnover of R955 540 736.59 and a volume of 114 080.84 tons sold. Pretoria (PTA), Cape Town (CT), and Durban (DBN) also contribute significantly to the overall turnover and mass sales. The total smallholder market share estimate is R635 321 845.28 and 72 943 tons. The success of markets with high smallholder participation, such as Johannesburg (JHB) and Pretoria (PTA), can be attributed to several factors, including larger consumer bases, well-established infrastructure, and government support. In contrast, markets with lower smallholder market shares, such as Kimberley (KIM) and George (GEO), might be facing challenges such as inadequate infrastructure, unfavourable economic conditions, and insufficient institutional support. Consumer preferences, technology adoption, and geographical constraints further shape the market landscape.

**Table 1: Turnover and mass of fruits and vegetables in the NFPMs**

NFPM	Revenue (Rand)	Total Mass (Ton)	Stallholder Market Share Estimate (Rand)	Stallholder Market Share Estimate (Ton)
JHB	955 540 736.59	114 080.84	286 662 220.98	34 224.25
PTA	400 697 262.41	51 335.84	120 209 178.72	15 400.75
CT	250 656 899.78	24 948.87	75 197 069.93	7 484.66
DBN	185 400 137.36	21 790.41	55 620 041.21	6 537.12
SP	63 843 194.77	8 756.39	19 152 958.43	2 626.92
BFN	57 724 772.29	6 471.01	17 317 431.69	1 941.30
EL	53 405 481.06	5 766.67	16 021 644.32	1 730.00
KDP	39 856 996.90	5 326.88	11 957 099.07	1 598.06
WLK	33 245 449.30	3 980.58	9 973 634.79	1 194.17
PMB	30 502 278.49	3 806.80	9 150 683.55	1 142.04
P E	28 393 485.50	3 357.97	8 518 045.65	1 007.39
WBK	5 267 355.97	786.51	1 580 206.79	235.95
GEO	4 821 027.87	540.34	1 446 308.36	162.10
KIM	4 585 817.98	618.66	1 375 745.39	185.60
VE	3 798 588.00	526.44	1 139 576.40	157.93
<b>TOTAL</b>	<b>2 117 739 484.27</b>	<b>252 094.23</b>	<b>635 321 845.28</b>	<b>75 628.27</b>

Source: DALRRD (2023)

### 3. VEGETABLES– NOVEMBER 2023

**Table 2** presents smallholder market share estimates for vegetables, focusing on the top 20 performing vegetables across various NFPMs. Potatoes have the highest revenue and mass in the fresh produce market share, accounting for a smallholder market share estimate of R186 701 912 and 23 835 tons, respectively. Tomatoes rank second in market share, contributing R67 837 208 and 6 733 tons. Onions are third, contributing R38 037 362 and 9 916 tons. The trade pattern shows that smallholder farmers are actively involved in the potato, tomato and onion markets. However, smallholder market access varies considerably across different vegetables. Vegetables within the top 10, including peppers, carrots, butternut squashes, cabbage, lettuce, beetroot, and pumpkins, exhibit moderate to high smallholder market shares, indicating reasonable access for smallholders. Conversely, the contribution of other vegetables is relatively low.

**Table 2: Top 20 performing vegetables**

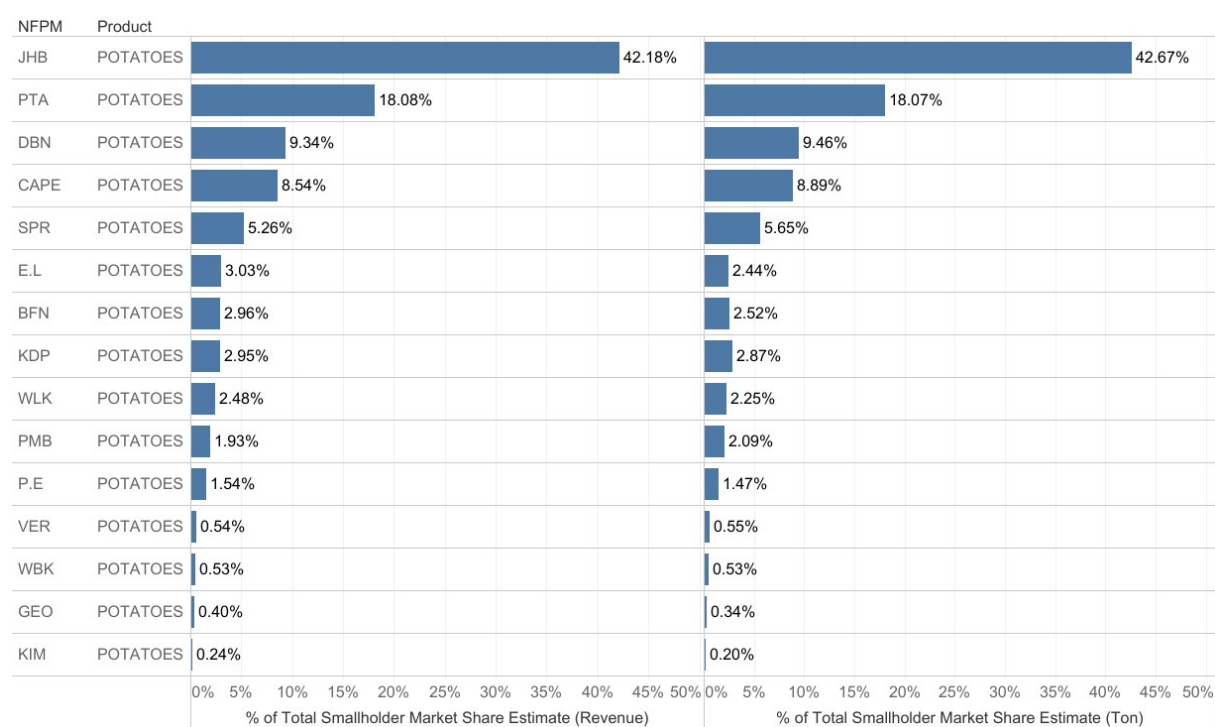
Product	Smallholder Market Share Estimate (Rand)	Smallholder Market Share Estimate (Ton)
POTATOES	186 701 912	23 835
TOMATOES	67 837 208	6 733
ONIONS	38 037 362	9 916
PEPPERS	22 331 445	1 559
CARROTS	16 193 646	3 209
BUTTERNUT	10 162 254	1 809
CABBAGE	9 832 253	4 143
LETTUCE	7 742 969	534
BEETROOT	4 861 583	1 255
PUMPKINS	4 794 568	1 333
SWEET POTATOES	4 517 123	357
ENGLISH	4 001 699	601
GARLIC	3 064 511	74
CAULIFLOWER	3 054 918	99
BROCCOLI	2 864 601	114
CHILLIES	2 711 567	230
GREEN BEANS	2 680 142	255
SWEETCORN	2 501 556	100
GINGER	2 425 190	30
HUBBARD	2 353 211	912
OTHER	13 265 977	1 380
<b>TOTAL</b>	<b>411 935 696</b>	<b>58 479</b>

Source: DALRRD (2023)



### 3.1 POTATOES

This section presents a comprehensive overview of smallholder market share estimates for potatoes across various NFPMs, as depicted in **Figure 1**. Johannesburg emerges as the leading market, accounting for a market share of 42.18% in revenue and 42.67% in tons. Pretoria (PTA) ranks second, contributing 18.03% in revenue and 18.07% in tons. Durban (DBN) and Cape Town (CT) also make significant contributions, each achieving around 8.5-9.3% of the market share in revenue and 8.9-9% in tons. Springs (SPR) and East London (EL) exhibit moderate shares, contributing approximately 5.26% and 3.03% in revenue, respectively. The market share distribution among other regions is well-balanced, with market shares ranging from 0.24% to 2.94% in revenue. However, the concentration of market access in the Gauteng province may pose challenges for smallholder farmers outside the province, potentially limiting their market access.



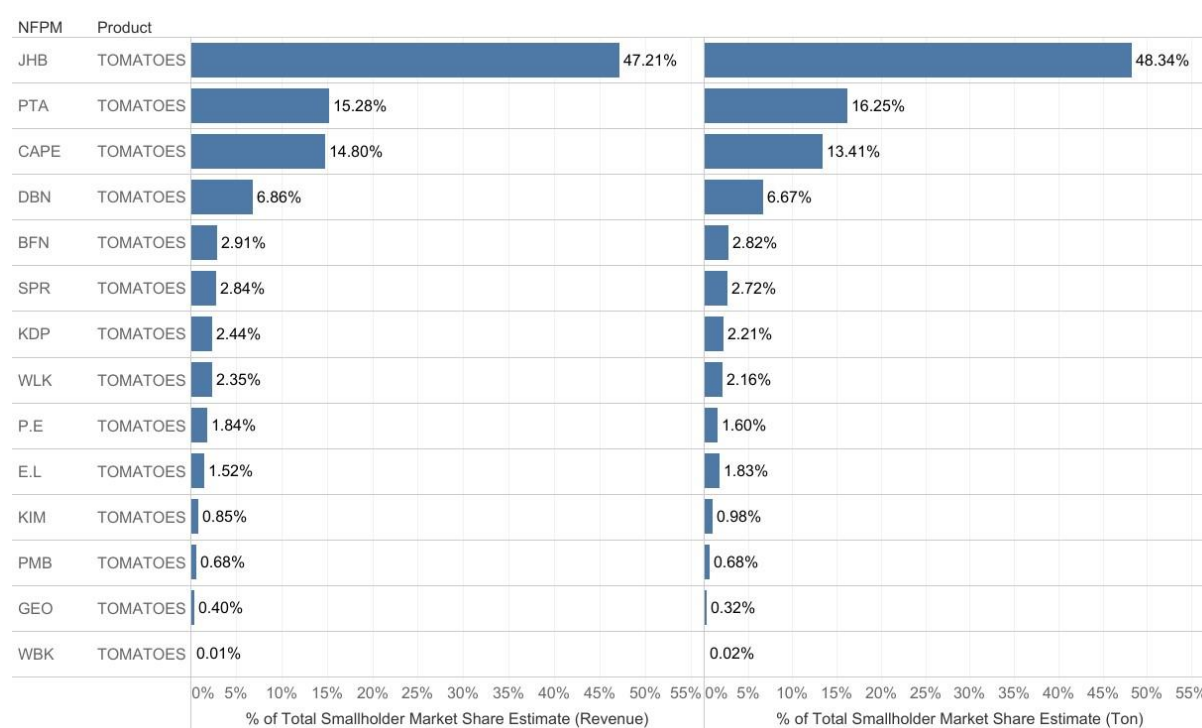
**Figure 1: Smallholder market share estimate for potatoes**

Source: DALRRD (2023)



## 3.2 TOMATOES

**Figure 2** presents the smallholder market share estimates for tomatoes across various National Fresh Produce Markets (NFPMs). The cumulative smallholder market share estimate for tomatoes in Johannesburg (JHB), Pretoria (PTA), Cape Town (CT), and Durban (DBN) constitutes approximately 84.15% of the revenue, while the remaining NFPMs constitute 15.75%. JHB emerges as the top contributor among these markets, accounting for 47.21% of the revenue and 48.34% of the tonnage. PTA and CT follow, contributing 15.28% and 14.80% of the revenue market share, respectively. DBN constitutes 6.86% of the revenue and 6.67% of the tonnage. This concentration implies that smallholder farmers in JHB, PTA, CT, and DBN have good access to the tomato market. This indicates potentially established channels and opportunities for these farmers to participate in and benefit from the market.

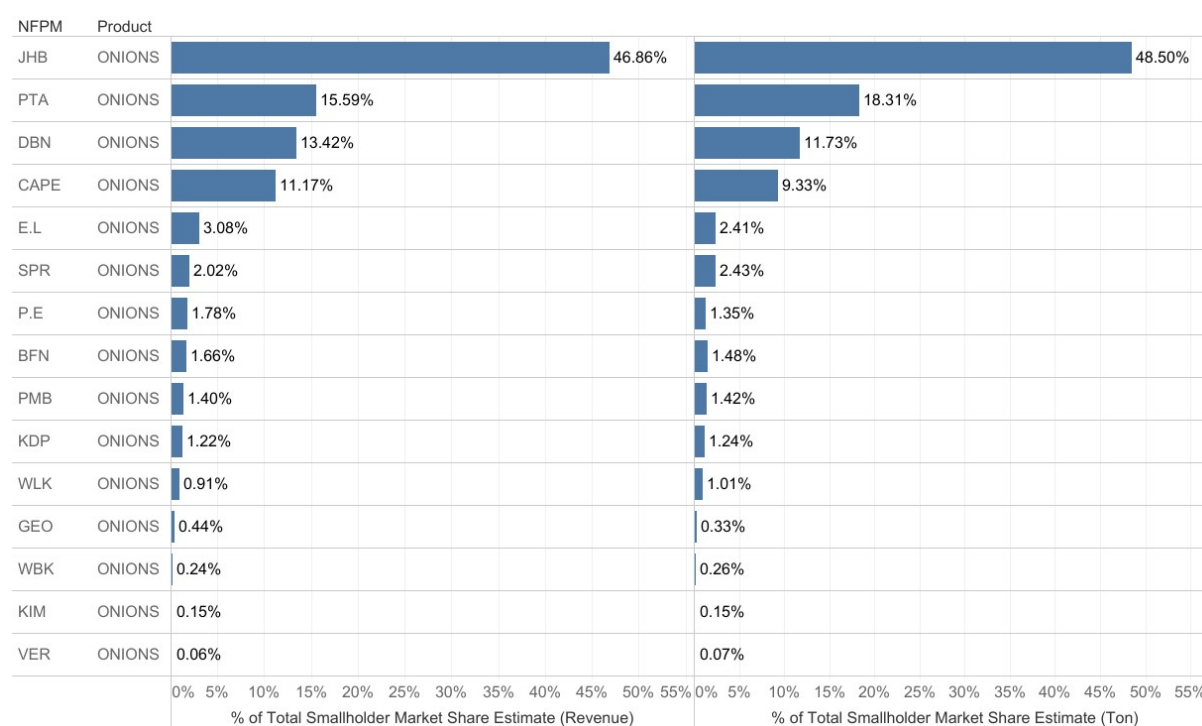


**Figure 2: Smallholder market share estimate for tomatoes**

Source: DALRRD (2023)

### 3.3 ONIONS

The distribution of smallholder market estimates for onion across NFPMs is in **Figure 3**. JHB remains dominant in the onion market, contributing 46.86% in revenue and 48.50% in tonnage. Pretoria (PTA) maintains a second position, accounting for 15.59 % of revenue and 18.31% in tonnage. Durban (DBN) and Cape Town (CAPE) represent double-digit revenue and tonnage percentages, with smallholder farmers' significant participation in these markets. Meanwhile, other markets represent single-digit percentages, suggesting their market share is relatively low. As a result, addressing potential challenges in these regions and implementing targeted strategies could enhance market access and support for smallholder farmers, fostering a more balanced and inclusive participation.



**Figure 3: Smallholder market share estimate for onions**

Source: DALRRD (2023)

#### 4. FRUITS– NOVEMBER 2023

This section focuses on the smallholder market share estimates for the top 20 fruits traded at national fresh produce markets, as elaborated in **Table 3**. The total revenue generated by these fruits amounted to R223 403 492, with a tonnage of 17 150. Bananas emerged as the leading fruit in revenue and tonnage, contributing R58 603 099 and 4 660 tons, respectively. Apples and watermelons followed, generating revenue of R40 608 007 and R16 960 415 and tonnages of 3 071 and 3 436, respectively. Nectarines and avocados claimed positions four and five, respectively. Other fruits such as peaches, grapes, pears, and pineapples followed this trend. Considerably, since the beginning of the summer season, watermelon and nectarines have claimed a spot in the top five, overtaking avocados. Additionally, peaches and grapes have experienced a significant increase in demand, claiming positions six and seven, respectively, owing to seasonality adjustment.

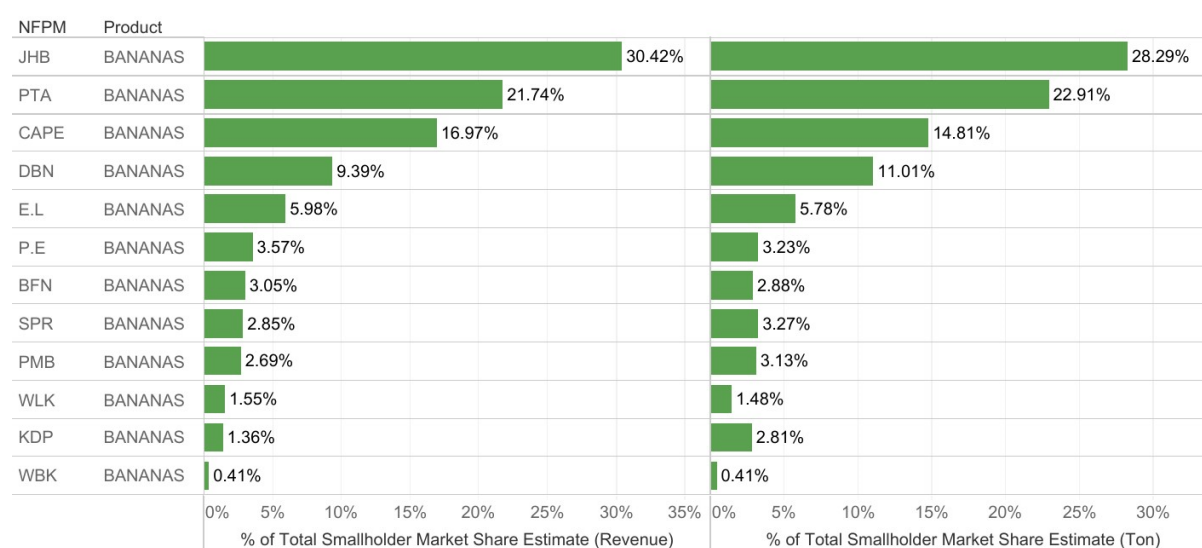
**Table 3: Top 20 performing fruits**

Product	Smallholder Market Share Estimates (Rand)	Smallholder Market Share Estimates (Ton)
BANANAS	58 603 099	4 660
APPLES	40 608 007	3 071
WATERMELONS	16 960 415	3 436
NECTARINES	13 194 787	679
AVOCADOS	11 436 196	599
PEACHES	10 580 623	554
GRAPES	9 541 259	222
PEARS	8 689 840	600
PINEAPPLES	7 270 356	575
CHERRIES	5 798 444	72
STRAWBERRIES	5 788 105	108
LEMONS	4 445 369	617
ORANGES	4 101 310	413
PLUMS	4 071 437	244
MANGOES	3 228 366	152
SWEET MELONS	2 371 759	220
APRICOTS	2 233 939	100
MUSKMELONS	1 976 221	190
PAPAYAS	1 889 279	71
NAARTJIES(MANDARIN	1 539 572	166
OTHER FRUITS	9 075 108	403
<b>TOTAL</b>	<b>223 403 492</b>	<b>17 150</b>

Source: DALRRD (2023)

## 4.1 BANANAS

This section highlights the smallholder market share estimates for bananas across national fresh produce markets, as illustrated in **Figure 4**. JHB has the highest market share at 30.42% in revenue, indicating its dominance in the banana market. PTA and CT follow with 21.74% and 16.97% in revenue, respectively. The trend implies that large urban areas exhibit higher market shares, possibly due to higher purchasing power and accessibility to diverse consumer demographics. Conversely, regions like DBN, EL, PE, KIM, WLK, and BFN show progressively lower market shares. The declining market shares suggest a need for tailored strategies to address the unique dynamics in each region.

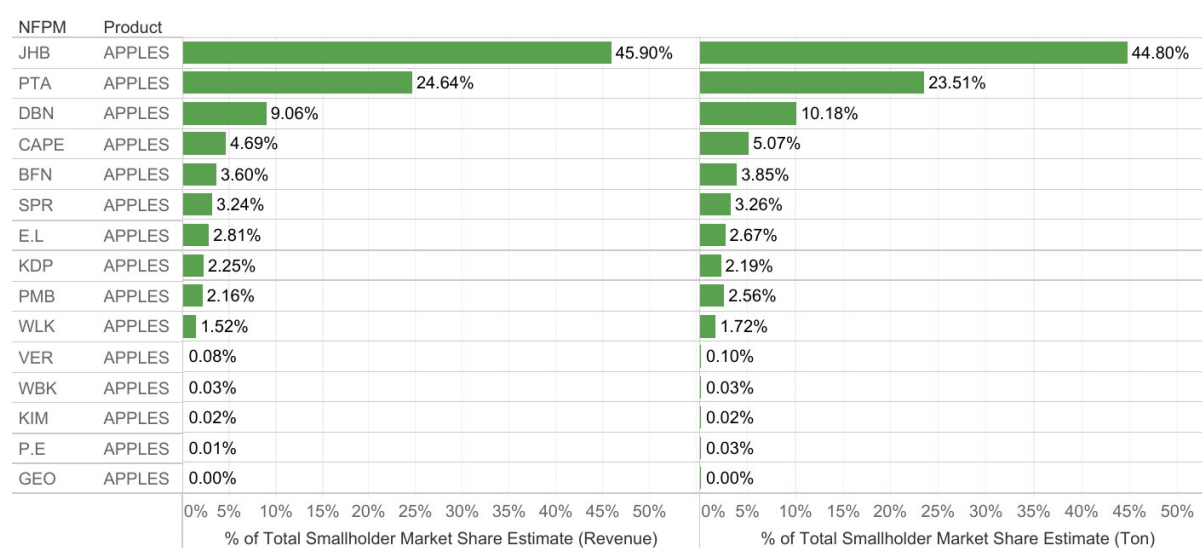


**Figure 4: Smallholder market share estimate for bananas**

Source: DALRRD (2023)

## 4.2 APPLES

**Figure 5** shows the smallholder market shares for apples in different national fresh produce markets. JHB emerges as the predominant market, constituting a share of 45.90% in revenue and 44.80% in tonnage. This market share indicates a robust market demand for apples in the metropolitan area, potentially influenced by higher purchasing power and a large consumer base. PTA and DBN follow with market shares of 24.64% and 9.06% in revenue and 23.51% and 10.18% in tonnage, respectively. CT and BFN contribute moderately to the apple market, with shares of 4.69% and 3.60% in revenue and 5.07% and 3.85% in tonnage, respectively. Smaller market shares are observed in other national fresh produce markets, indicating varying market access.

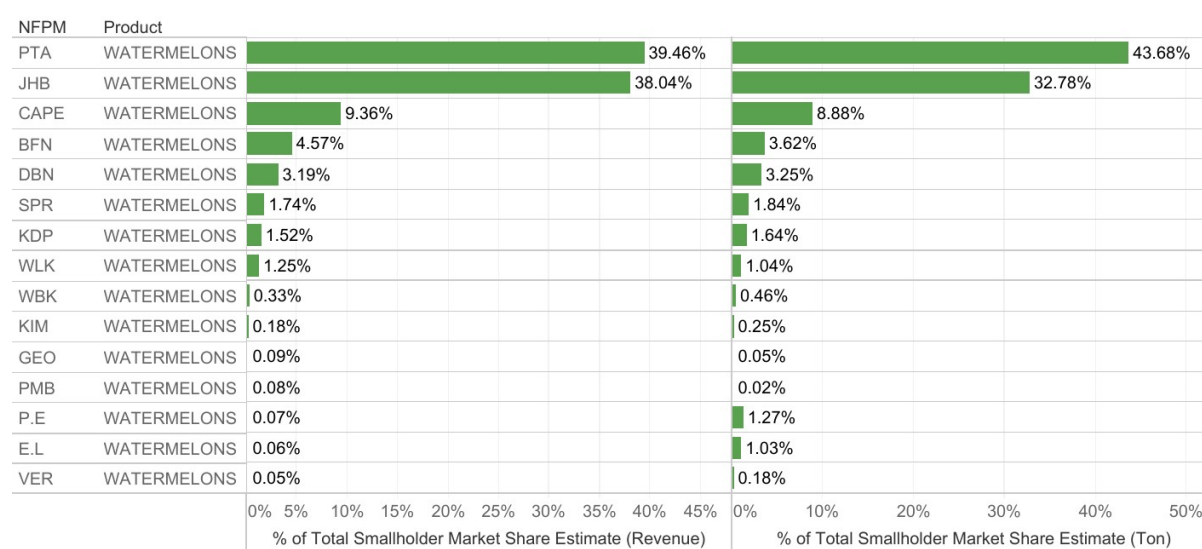


**Figure 5: Smallholder market share estimate for apples**

Source: DALRRD (2023)

### 4.3 WATERMELONS

The smallholder market share estimate for watermelons across various NFPMs is illustrated in **Figure 6**. PTA and Johannesburg JHB are the leading watermelon markets, representing market shares of 39.46% and 38.04% in revenue and 43.68% and 32.78% in tonnage, respectively. CT takes third position with a market share of 9.36% in revenue and 8.88% in tonnage. BFN, DBN, and SPR follow with smaller but significant market shares. However, other NFPMs exhibit relatively low market shares in both revenue and tonnage. These regions may experience lower consumer demand, outsourcing, or challenges accessing watermelon markets.



**Figure 6: Smallholder market share estimate for watermelon**

Source: DALRRD (2023)

## 5. PRICES

**Table 4** illustrates October 2023 to November 2023 fruit and vegetable price changes. Apples follow a declining price trend across all NFPMs, with the highest decline in Johannesburg (-13.1%). Bananas, on the other hand, experienced a minor increase in CT (0.5%) and significant decreases in JHB (-10.8%) and PTA (-2.6%). The prices of onions increased in all CT (21.15%), JHB (18.5%) and PTA (21.2%). Potatoes prices increased from 24.6% in PTA and 24.9% in JHB to 27.5% in Cape Town. Tomatoes and watermelons also recorded price hikes. These fluctuations suggest a complex interplay of factors, including supply chains, local demand, and potentially seasonal adjustments.

**Table 4 Month-to-month fruit and vegetable price changes**

October 2023 Fruits and Vegetable Prices (Rand/Ton)						
NFPM	APPLES	BANANAS	ONIONS	POTATOES	TOMATOES	WATERMELONS
CT	12221.4	14408.9	4591.4	7528.9	11121.2	5200.9
JHB	13548.7	13524.5	3706.5	7743.2	9839.7	5729.1
PTA	13856.6	11935.4	3265.9	7834.8	9474.0	4459.7
November 2023 Fruits and Vegetable Prices (Rand/Ton)						
NFPM	APPLES	BANANAS	ONIONS	POTATOES	TOMATOES	WATERMELONS
CT	11167.3	14487.3	5808.2	10386.4	13671.0	7996.2
JHB	11981.4	12209.2	4546.0	10304.0	11397.6	7578.6
PTA	12090.5	11636.6	4142.0	10386.6	11532.3	5585.0
Month-to-month percentage price change						
NFPM	APPLES	BANANAS	ONIONS	POTATOES	TOMATOES	WATERMELONS
CT	-9.4%	0.5%	21.0%	27.5%	18.7%	35.0%
JHB	-13.1%	-10.8%	18.5%	24.9%	13.7%	24.4%
PTA	-14.6%	-2.6%	21.2%	24.6%	17.8%	20.1%

Source: DALRRD (2023)



## 6. CONCLUSION

This report presents the optimal 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 November 2023 reveals that smallholder farmers generated R635 321 845.28 and 72 943 tons from fruits and vegetables, indicating the positive impact of policy recommendations on fostering smallholder market access. Regarding the best-performing commodities, potatoes, onions, and tomatoes dominate the vegetable market, while bananas, apples, and watermelons constitute more than half the market share in the fruit market. The top four performing NFPMs are Johannesburg, Pretoria, Durban and Cape Town, while NFPMs such as George, Kimberley, Klerksdorp, and Vereeniging have relatively small market shares. The concentration of critical fresh produce such as bananas, apples, potatoes and tomatoes contributes significantly to total revenue and mass, highlighting their economic importance.

Regarding price trends, October to November 2023 percentage price change showed that apples declined. Bananas experienced mixed trends, with a slight increase in Cape Town but significant decreases in Johannesburg and Pretoria. Onions followed widespread price increases, indicating potential increase in demand. Potato prices consistently trended upward, and tomatoes and watermelons recorded a price rise. These fluctuations illustrate the complexity of supply chains, local demand dynamics, and potential seasonal adjustments. Given the fluctuation of market prices, smallholder farmers are encouraged to remain flexible in their planning, collaborate with other stakeholders and leverage market information to make informed decisions. However, the prerequisite to sustain and increase the dominance of smallholder farmers 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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