



SMALLHOLDER MARKET ACCESS ESTIMATES

DECEMBER 2023

***National Agricultural
Marketing Council***

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TABLE OF CONTENTS

ABBREVIATIONS	1
1. BACKGROUND.....	2
2. TOTAL MARKET TURNOVER IN DECEMBER 2023.....	2
3. VEGETABLES– DECEMBER 2023	3
4. FRUITS– DECEMBER 2023	4
5. PRICES-DECEMBER 2023	5
6. CONCLUSION	6
7. REFERENCES.....	7



LIST OF TABLES

Table 1: Comparative turnover and mass of fruits and vegetables	2
Table 2: Smallholder Market Access Estimates for Vegetables.....	3
Table 3: Smallholder Market Access Estimates for Fruits	4
Table 4: November to December price changes for selected fruits and vegetables.	5

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
SAUFM	South African Union of Food Markets
TSH	Tshwane
UMT	Umtata
VER	Vereeniging
WBK	Witbank
WLK	Welkom

1. BACKGROUND

This report analyses smallholder market access estimates across National Fresh Produce Markets (NFPM) in South Africa during December 2023. This 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 supplied in all fresh produce markets. The analysis focuses on 15 NFPMs. The primary focus of the analysis is on the top 20 performing fruits and vegetables sold across 15 NFPMs. The decision to concentrate on the top 20 fruits and vegetables across 15 NFPMs is that they account for approximately 97% of the total volume traded and 97% of the revenue generated in NFPMs.

2. TOTAL MARKET TURNOVER IN DECEMBER 2023

In December 2023, the total market turnover in 15 National Fresh Produce Markets amounted to R2 108 797 605.63. At the same time, the total mass sold during this period was 242 490 metric tons. The smallholder market share is R632 639 281.69 and 72 747 metric tons. Johannesburg, Tshwane, Cape Town and Durban continue to account for larger smallholder market share owing to extensive consumer base and well-established infrastructure. The comparison between the revenue and mass sold during December 2023 and November 2023 indicates a decline of 0.48% in revenue and 3.81% in mass supplied. However, comparing the year-over-year data, we observe an increase in revenue by 1.9% and a decline in mass supplied by 12.9%. Despite the month-to-month decline, the fresh produce market has shown resilience by recording positive year-over-year revenue growth. This suggests that, over the longer term, the market has adapted to changing conditions and continues to meet the demands of consumers.

Table 1: Comparative turnover and mass of fruits and vegetables

NFPM	SME (Rand)	SME (metric ton)
1. JHB	R280 793 397.30	31 635.6
2. TSH	R123 225 237.14	14 682.3
3. CPT	R70 561 439.10	7 531.5
4. DBN	R59 410 183.42	6 963.3
5. SPR	R16 640 365.62	1 835.7
6. EL	R17 537 409.00	1 926.9
7. BFN	R9 013 799.91	1 117.8
8. KDP	R18 483 523.40	2 448.3
9. WLK	R9 760 289.28	1 205.4
10. PE	R11 749 865.84	1 490.4
11. PMB	R10 178 297.06	1 223.4
12. NLP	R830 346.90	120
13. WBK	R1 209 512.75	159.9
14. KIM	R1 536 805.08	216.6
15. VER	R1 708 809.90	189.9
TOTAL DECEMBER 2023	R632 639 281.69	72 747
TOTAL DECEMBER 2022	R620464988.81	83 595.00
TOTAL NOVEMBER 2023	635 321 845.28	75 628.27
M/M Change	-0,42%	-3,81%
Y/Y change	1.9%	-12.9%

Source: DALRRD (2024)

3. VEGETABLES– DECEMBER 2023

This section will provide a breakdown of smallholder market access for the top twenty vegetables across selected fresh produce markets based on the revenue and mass estimates presented in Table 1. In this case, Table 2 illustrates the distribution of smallholder market access for vegetables in fresh produce markets. The data reveals that the smallholder market access estimate is mainly concentrated in four markets - Johannesburg (JHB), Tshwane (TSH), Durban (DBN) and Cape Town (CPT). Johannesburg stands out with a 46.0% smallholder market access estimate, followed by Tshwane (18.7%), Cape Town (9.5%) and Durban (9.1%). These four markets account for 83.3% of smallholder market access estimates, while the remaining 16.7% is distributed among other markets.

When the markets' contribution is aggregated by province, Gauteng Province (JHB, TSH, and VER) dominates with 65% of smallholder market access estimates, followed by Kwazulu-Natal (KZN) Province (DBN and PMB) at 10.3%. These findings suggest that Gauteng and KZN provinces are the most popular destinations for fresh produce. This dominance can be attributed to the urban nature of these markets, as about 56% of the country's population lives in three provinces, namely Gauteng, KwaZulu-Natal and the Western Cape (STATSSA, 2023). Moreover, a well-established network of suppliers and infrastructure offers extensive opportunities for smallholder farmers.

Table 2: Smallholder Market Access Estimates for Vegetables

Comodity	Market															Grand To..
	JHB	TSH	CPT	DBN	SPR	EL	BFN	KDP	WLK	PE	PMB	NLP	WBK	KIM	VER	
POTATOES	18.3%	8.6%	3.5%	4.2%	2.3%	1.4%	1.3%	1.3%	1.2%	0.9%	0.8%	0.3%	0.2%	0.1%	0.2%	44.6%
TOMATOES	7.3%	2.5%	1.8%	1.2%	0.4%	0.2%	0.5%	0.4%	0.4%	0.3%	0.1%	0.0%	0.0%	0.1%	0.0%	15.2%
ONIONS	5.0%	1.6%	0.7%	1.1%	0.2%	0.3%	0.1%	0.1%	0.1%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	9.5%
PEPPERS	3.8%	1.3%	0.9%	0.4%	0.1%	0.2%	0.1%	0.1%	0.0%	0.1%	0.0%		0.0%	0.0%	0.0%	7.0%
CARROTS	2.0%	0.9%	0.2%	0.7%	0.1%	0.3%	0.1%	0.1%	0.0%	0.2%	0.0%		0.0%	0.0%	0.0%	4.6%
LETTUCE	1.1%	0.5%	0.2%	0.3%	0.0%	0.0%	0.1%		0.0%	0.0%	0.0%		0.0%		0.0%	2.3%
BUTTERNUT SQUASHES	1.1%	0.4%	0.2%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	2.0%
CABBAGE	0.7%	0.4%	0.1%	0.2%	0.1%	0.0%	0.1%	0.1%	0.1%	0.0%	0.0%		0.0%	0.0%	0.0%	1.8%
BEETROOT	0.7%	0.4%	0.1%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	1.6%
ENGLISH CUCUMBERS	0.8%	0.3%	0.3%		0.0%	0.0%	0.0%	0.0%	0.0%		0.0%		0.0%	0.0%	0.0%	1.5%
PUMPKINS	0.4%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
GREEN BEANS	0.5%	0.2%	0.1%	0.0%	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%		0.0%		0.0%	0.9%
BROCCOLI	0.5%	0.2%	0.1%		0.0%	0.0%			0.0%	0.0%	0.0%		0.0%		0.0%	0.8%
CHILLIES	0.4%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.8%
GARLIC	0.3%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.7%
SWEET POTATOES	0.4%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%	0.7%
CAULIFLOWER	0.4%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%		0.6%
HUBBARD SQUASHES	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			0.0%	0.0%	0.0%	0.6%
GINGER	0.3%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					0.6%
SWEETCORN	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			0.0%		0.6%
OTHER VEGETABLES	1.4%	0.4%	0.6%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%
Grand Total	46.0%	18.7%	9.5%	9.1%	3.4%	2.6%	2.5%	2.1%	2.0%	1.7%	1.2%	0.4%	0.3%	0.2%	0.2%	100.0%

Source: DALRRD (2024)

Regarding commodity-specific smallholder market access estimates, the vegetables with the highest market access estimates across all vegetables and selected markets are potatoes, tomatoes, onions, peppers and carrots. Among these, potatoes dominate the smallholder market access with a 44.6% share, followed by tomatoes and onions with 15.2% and 9.5%, respectively. Peppers and carrots contribute 7% and 4.6%, respectively. These five vegetables account for about 80.9% of the smallholder market share estimates. The top twenty popular vegetables have a smallholder market share estimate of about 6%, while other vegetables constitute approximately 3.1%.

4. FRUITS– DECEMBER 2023

This section shows smallholder market access for the top twenty fruits across selected fresh produce markets based on the revenue and mass estimates presented in Table 1. Table 3 displays a smallholder market access estimate distribution between the top twenty performing fruits in the selected fresh produce markets. The distribution of smallholder market access estimates for fruits follows a similar distribution with the vegetables; Johannesburg emerges as the leading market with a market share of 41%, followed by Tshwane with 20.9%, Cape Town with 14.4% and Durban with 10%. These markets contribute 86.48% of the smallholder market access estimates, while others account for 13.52%. The fact that Johannesburg, Tshwane, Cape Town and Durban continue to account for a larger smallholder market share can be attributed to similar factors outlined in the previous section.

Table 3: Smallholder Market Access Estimates for Fruits

Comodity	Market															Grand Tot..
	JHB	TSH	CPT	DBN	EL	BFN	SPR	PMB	KDP	PE	WLK	WBK	KIM	NLP	VER	
BANANAS	7.6%	5.0%	4.1%	2.5%	1.6%	0.8%	0.7%	0.7%	0.5%	0.9%	0.4%	0.1%	0.0%	0.0%	0.0%	24.8%
APPLES	6.3%	3.3%	0.7%	1.4%	0.5%	0.5%	0.4%	0.3%	0.3%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	13.9%
WATERMELONS	3.1%	2.8%	1.2%	0.3%	0.0%	0.2%	0.1%	0.0%	0.1%	0.0%	0.2%	0.0%	0.0%		0.0%	8.0%
MANGOES	2.6%	1.4%	1.2%	0.9%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%		0.0%	7.1%
GRAPES	3.3%	1.2%	0.5%	1.0%	0.0%	0.3%	0.1%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%		0.0%	6.6%
NECTARINES	2.4%	1.2%	0.6%	0.8%	0.2%	0.3%	0.1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%		0.0%	5.9%
AVOCADOS	2.4%	0.6%	1.4%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%		0.0%	4.8%
PEACHES	1.8%	0.8%	0.6%	0.7%	0.3%	0.1%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	4.5%
PLUMS	1.6%	0.7%	0.2%	0.5%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	3.5%
PINEAPPLES	1.4%	0.6%	0.6%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%			3.2%
LITCHIS	1.3%	0.7%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%				2.6%
STRAWBERRIES	0.9%	0.5%	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				0.0%	2.2%
CHERRIES	1.1%	0.4%	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%						2.1%
LEMONS	1.1%	0.3%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	2.1%
PEARS	0.9%	0.3%	0.1%	0.2%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	1.8%
SWEET MELONS	0.4%	0.1%	0.9%	0.0%	0.0%	0.0%			0.0%	0.0%	0.0%		0.0%			1.4%
MUSKMELONS	0.7%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%		0.0%	0.0%	0.0%					1.1%
ORANGES	0.4%	0.1%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	0.9%
PAPAYAS	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					0.7%
APRICOTS	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				0.0%	0.6%
OTHER FRUITS	0.9%	0.6%	0.5%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		0.0%	2.2%
Grand Total	41.0%	20.9%	14.4%	10.0%	3.1%	2.8%	2.0%	1.8%	1.4%	1.2%	1.1%	0.1%	0.1%	0.0%	0.0%	100.0%

Source: DALRRD (2024)

Unlike vegetables, smallholder market estimates for fruits are fairly distributed. Bananas dominate the fruit market, accounting for 24.8% of smallholder market access estimates. Apples and watermelons follow, contributing 13.9% and 8%, respectively. Comparing November and December 2023, mangoes and grapes have shown significant improvement in rankings, with mangoes moving from thirteenth to fourth place and contributing 7.1%, while grapes moved from seventh to fifth place, contributing 6.6%. This shift in mangoes and grapes can be attributed to the harvest season, which commences in November and peaks between December and February. The top five fruits account for 60.3% of smallholder market access estimates. Fruits ranked between sixth and twenty positions contribute 29.7%, while others contribute 10%. These findings suggest that smallholder market access is concentrated amongst the top five fruits and top four markets.

5. PRICES-DECEMBER 2023

This section examines the month-to-month price fluctuations of selected high-performing fruits and vegetables across NFPMs, as detailed in Table 4. In November 2023, the price per ton for apples was R12 196.78, which increased to R12 557.19 in December 2023, indicating a 2.95% month-to-month increase. On the contrary, bananas experienced a 5.84% decrease in price, with the price per ton declining from R12 061.77 in November to R11 357.29 in December. Bananas are available all year round but are more abundant and cheaper in summer. At the same time, watermelons recorded a significant price decrease of 14.85% per ton, declining from R5 191.48 in November to R4 420.66 in December.

Table 4: November to December price changes for selected fruits and vegetables.

Commodity	November 2023-R/T	December 2023-R/T	% Change (m/m)
APPLES	12 196.78	12 557.19	2.95%
BANANAS	12 061.77	11 357.29	-5.84%
WATERMELONS	5 191.48	4 420.66	-14.85%
ONIONS	4 020.89	4 225.98	5.10%
POTATOES	8 230.06	7 908.54	-3.91%
TOMATOES	10 260.26	10 558.21	2.90%

Source: DALRRD (2024)

Examining other commodities, the price per ton of onions increased by 5.10%, from R4 020.89 in November to R4 225.98 in December. Conversely, potatoes experienced a substantial price decline, decreasing from R8 230.06 in November to R7 908.54 in December, marking a significant change -3.91%. The decline in potato prices can be associated with the low quality of potatoes supplied (ABSA, 2023). Tomatoes also witnessed a notable price increase per ton, increasing from R10 260.26 in November to R10 558.21 in December, resulting in a

2.90% change. This increase could be associated with increased demand during the festive season since tomatoes are used for making salads, sauces, and soups, popular dishes during the festive season.

6. CONCLUSION

The December 2023 smallholder market access estimate report indicates that the aggregate revenue and mass generated by small-scale farmers from fruits and vegetables was R632 639 281.69 and 72 747 metric tons. The report highlights the importance of policy recommendations that promote market access and transformation. The smallholder market access is concentrated in the top four markets, including Johannesburg, Tshwane, Cape Town and Durban. These markets account for more than 80% of smallholder market access share. Regarding vegetables, potatoes are the most widely supplied vegetable, accounting for 44.6% of the smallholder market share. Tomatoes come in second with 15.2%, followed by onions at 9.5%. Peppers and carrots contribute 7% and 4.6%, respectively. These top five vegetables constitute 80.9% of the smallholder market share.

The report also highlights that bananas are the most commonly supplied fruit in the market, contributing 24.8% of smallholder market access estimates. Apples and watermelons follow in second and third positions, contributing 13.9% and 8%, respectively. Mangoes and grapes have shown significant improvement in rankings between November and December 2023, with mangoes moving from thirteenth to fourth place and contributing 7.1%, while grapes moved from seventh to fifth place, contributing 6.6%. The month-to-month price changes for apples, onions and tomatoes experienced upward trends, while potatoes, bananas and watermelons experienced significant declines. A combination of factors, such as seasonality, supply and demand, weather conditions, and market dynamics, could explain the price fluctuations for fruits and vegetables. As a result, fresh produce market stakeholders must comprehend these fluctuations to make informed decisions and respond effectively to ever-changing market dynamics.

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