



SMALLHOLDER MARKET ACCESS ESTIMATES

January 2024

***National Agricultural
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ABBREVIATIONS

BLN	Bloemfontein
CT	Cape Town
DALRRD	Department of Agriculture, Land Reform and Rural Development
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 (NFPMs) in South Africa during January 2024. 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. SMALLHOLDER MARKET ACCESS TURNOVER IN JANUARY 2024

The smallholder market access estimates for fruits and vegetables in different NFPMs for January 2024 compared to January 2023 and the total for December 2023 are illustrated in **Table 1**. In January 2024, the vegetable market performed better than the fruit market, generating a higher revenue of R351 million and a volume of 52 836 tons compared to fruits, generating revenue of R222 million and 21 874 tons. This pattern was consistent across most markets, with vegetables consistently surpassing fruits in both revenue and quantity. Comparing year-over-year changes, the fruit market value increased by 4%, while the vegetable market grew by 2%. However, the quantity of fruits sold decreased by 3%, while the volume of vegetables remained stable. Despite the increase in market value, the decrease in the quantity of fruits sold suggests a potential increase in fruit prices or a shift in consumer preferences. At the same time, the stable volume of vegetables indicates a steady market demand.

Table 1: Comparative revenue and mass of fruits and vegetables

Markets	Fruits		Vegetables	
	Rand	Ton	Rand	Ton
1. JHB	90 779 632	8 332	155 110 340	23 848
2. TSH	44 431 625	4 432	63 643 579	10 077
3. CPT	30 613 645	2 930	38 464 325	4 792
4. DBN	23 987 284	2 508	34 233 906	4 954
5. SPR	5 387 906	853	12 458 995	1 997
6. BFN	7 214 283	696	9 203 335	1 428
7. EL	6 009 003	541	8 875 027	1 251
8. PE	2 527 741	236	7 208 391	1 047
9. KDP	3 115 412	349	6 609 674	1 075
10. PMB	4 642 009	483	4 416 728	687
11. WLK	2 613 274	333	6 186 768	919
12. KIM	391 615	50	1 245 625	179
13. NLS	69 497	5	1 428 173	207
14. WBK	336 274	41	835 965	145
15. VER	143 195	17	804 748	126
Total January 2024	222 330 053	21 874	351 561 042	52 836
Total January 2023	214 133 249	22 653	346 107 462	52 639
Total December 2023	214 698 374	17 296	416 913 625.6	55 324.6
M/M % change	4%	26%	-16%	-4%
Y/Y % Change	4%	-3%	2%	0%

Source: DALRRD (2024)

The month-to-month changes have revealed a more dynamic picture, with the fruit market value increasing by 4% while the vegetable market experienced a significant decrease of 16%. Interestingly, the quantity of fruits sold increased by 26%, while the volume of vegetables decreased by 4%. The increased fruit market value and quantity sold month-to-month may indicate seasonal factors or temporary market dynamics. In contrast, the significant decrease in vegetable market value and volume sold may suggest a shift in market conditions or challenges impending supply. Regarding market breakdown, Johannesburg and Tshwane lead in fruit and vegetable revenue and quantity, reflecting their larger city sizes. Cape Town and Durban have similar but slightly smaller markets. Smaller markets like Bloemfontein and East London follow similar trends with higher vegetable revenue and quantity. The smallest markets show the lowest revenue and quantity for fruits and vegetables.

3. VEGETABLES– JANUARY 2024

This section provides a breakdown of smallholder market access for the top twenty vegetables across selected fresh produce markets based on the revenue and volumes sold. In this data, there are 96 different vegetables across 15 Fresh produce markets. However, we visualize top twenty, and aggregate other vegetables in a category “Other vegetable”. The smallholder market access estimates of various vegetables in different markets are illustrated in **Table 2**. The numbers in the table represent the percentage of smallholder market access estimates in terms of revenue for each vegetable in each NFPM. Each row represents a different vegetable, and each column represents a different NFPMs. Regarding commodity-specific smallholder market access estimates, potatoes dominate the smallholder market access with a 46.2% share, followed by tomatoes and onions with 15.8% and 10.0%, respectively.

Table 2: Smallholder Market Access Estimates for Vegetables (% Rands)

COMMODITIES	MARKET															Grand Total
	JHB	TSH	CPT	DBN	SPR	BFN	EL	PE	KDP	WLK	PMB	NLS	KIM	WBK	VER	
Potatoes	18.5%	8.4%	4.1%	4.8%	2.4%	1.4%	1.4%	1.3%	1.1%	1.1%	0.9%	0.3%	0.2%	0.2%	0.2%	46.2%
Tomatoes	7.3%	2.7%	2.1%	1.3%	0.5%	0.5%	0.3%	0.3%	0.4%	0.3%	0.1%	0.0%	0.1%	0.0%	0.0%	15.8%
Onions	4.8%	1.8%	0.8%	1.3%	0.2%	0.2%	0.3%	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	10.0%
Carrots	2.0%	0.8%	0.4%	0.5%	0.1%	0.1%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%
Peppers	2.2%	0.9%	0.7%	0.4%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%
Cabbage	0.9%	0.5%	0.1%	0.2%	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%
Butternut Squashes	0.9%	0.3%	0.4%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%
Lettuce	0.8%	0.3%	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
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%	0.0%	0.0%	0.0%	1.4%
Beetroot	0.6%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Pumpkins	0.3%	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Sweet Potatoes	0.4%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
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%	0.0%	0.8%
Broccoli	0.5%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Ginger	0.4%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Green Beans	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%	0.0%	0.7%
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%	0.0%	0.7%
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%	0.0%	0.0%	0.0%	0.6%
Cauliflower	0.4%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Hubbard Squashes	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Other Vegetables	1.8%	0.5%	0.7%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%
Grand Total	44.3%	18.2%	11.0%	9.8%	3.6%	2.6%	2.5%	2.1%	1.9%	1.8%	1.2%	0.4%	0.4%	0.2%	0.2%	100.0%

Source: DALRRD (2024)

Peppers and carrots contribute 4.4% and 4.5%, respectively. These five vegetables account for about 80.9% of the smallholder market share estimates. The vegetables ranked between six and twentieth position contribute 15.4%, while other vegetables constitute approximately 3.7%.

The distribution of smallholder market access estimates vegetables can be attributed to several factors. Certain vegetables, such as potatoes and onions, are well-suited to smallholder farming practices, requiring less specialized equipment. Their high yield potential per unit of land also contributes to their prominence. Additionally, the demand for vegetables like potatoes, tomatoes, and onions, along with the ease of accessing markets, influences the production. The smallholder market access estimate is mainly concentrated in four markets such as Johannesburg (JHB), Tshwane (TSH), Durban (DBN), and Cape Town (CPT). Johannesburg stands out with a 45.4% smallholder market access estimate, followed by Tshwane (19.1%), Cape Town (9.0%), and Durban (9.3%). These four markets account for 82.8% of smallholder market access estimates, while the remaining 17.2% is distributed among other markets. When the markets' contribution is aggregated by province, Gauteng Province (JHB, TSH, and VER) dominates with 64.7% of smallholder market access estimates, followed by KwaZulu-Natal (KZN) Province (DBN and PMB) at 10.6%. These findings suggest that Gauteng and KZN provinces are the most popular destinations for fresh produce.

The distribution of smallholder market access estimates in terms of volume sold is illustrated in **Table 3**. It is worth noting that the distribution of smallholder market access estimates in terms of volume varied from the revenue because vegetables are high in weight as compared to others yet not necessarily translating to high revenue. Smallholder market access estimates shows that potatoes and onion are ranked first and second in terms of volume, contributing 43.1% and 16.9%, respectively.

Table 3: Smallholder Market Access Estimates for Vegetables (% Tons)

COMMODITY	MARKET															Grand Total
	JHB	TSH	DBN	CPT	SPR	BFN	EL	KDP	PE	WLK	PMB	NLS	KIM	WBK	VER	
Potatoes	17.7%	7.9%	4.4%	3.4%	2.3%	1.3%	1.3%	1.1%	1.2%	1.1%	0.8%	0.3%	0.2%	0.1%	0.2%	43.1%
Onions	8.2%	3.3%	2.0%	1.3%	0.4%	0.3%	0.4%	0.2%	0.2%	0.2%	0.3%	0.1%	0.0%	0.0%	0.0%	16.9%
Tomatoes	5.3%	2.0%	1.0%	1.5%	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%	0.1%	0.0%	0.1%	0.0%	0.0%	11.4%
Cabbage	3.3%	1.4%	0.4%	0.2%	0.3%	0.3%	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%
Carrots	2.7%	1.1%	0.6%	0.5%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%
Butternut Squashes	1.6%	0.6%	0.2%	0.7%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	3.4%
Peppers	1.3%	0.7%	0.2%	0.5%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%
Beetroot	1.1%	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%	1.9%
Pumpkins	0.9%	0.3%	0.0%	0.2%	0.0%	0.1%	0.0%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
Hubbard Squashes	0.8%	0.3%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Lettuce	0.5%	0.2%	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%	1.1%
English Cucumbers	0.6%	0.2%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Sweet Potatoes	0.3%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Spinach	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Gem Squashes	0.3%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Green Beans	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Chillies	0.2%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Sweetcorn	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Cauliflower	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Other Vegetables	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Grand Total	45.4%	19.1%	9.3%	9.0%	3.8%	2.7%	2.4%	2.1%	2.0%	1.8%	1.3%	0.3%	0.3%	0.3%	0.2%	100.0%

Source: DALRRD 2024

Followed by tomatoes and cabbage contributing 11.4% and 6.6%, respectively. Carrots and butternut squashes contribute 5.6% and 3.4%, respectively. Collectively, these six vegetables contribute to 87% of the smallholder market access estimates in terms of volume. The concentration market access amongst these vegetables suggest that they might be easier to cultivate and yield more produce per unit of land. 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 45.4% smallholder market access estimate in terms of volume, followed by Tshwane (19.1%), Cape Town (9.3%), and Durban (9.0%). These four markets account for 82.8% of smallholder market access estimates, while the remaining 17.2% is distributed among other markets. When the markets' contribution is aggregated by province, Gauteng Province (JHB, TSH, and VER) dominates with 64.7% of smallholder market access estimates, followed by KwaZulu-Natal (KZN) Province (DBN and PMB) at 10.6%.

FRUITS– JANUARY 2024

This section provides a breakdown of smallholder market access for the top twenty fruits across selected fresh produce markets based on the revenue and volume sold. In this data, there are 60 different fruits across 15 Fresh produce markets. However, we visualized top twenty, and aggregate other fruits in a category “Other fruit”. The smallholder market access estimates of various vegetables in different markets are illustrated in **Table 4**. Bananas and apples dominate the fruit market, accounting for 24.6% and 15% respectively of smallholder market access estimates. Mangoes and grapes have shown significant improvement in rankings since December 2023, with mangoes moving from thirteenth to third place and contributing 9.9%, while grapes moved from seventh to fourth place, contributing 8.1%.

Table 4 Smallholder Market Access Estimates for Fruits (% Rand)

COMMODITY	MARKET															Grand Total
	JHB	TSH	CPT	DBN	BFN	EL	SPR	PMB	KDP	WLK	PE	KIM	WBK	VER	NLS	
Bananas	7.7%	4.8%	4.0%	2.5%	1.0%	1.3%	0.7%	0.8%	0.5%	0.4%	0.8%	0.1%	0.1%	0.0%	0.0%	24.6%
Apples	6.9%	3.5%	0.9%	1.5%	0.5%	0.3%	0.5%	0.2%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	15.0%
Mangoes	3.7%	1.8%	1.7%	1.4%	0.3%	0.2%	0.3%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	9.9%
Grapes	3.8%	1.5%	0.6%	1.2%	0.3%	0.1%	0.2%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%
Nectarines	2.6%	1.2%	0.7%	0.8%	0.4%	0.2%	0.2%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.5%
Plums	2.1%	1.0%	0.2%	0.8%	0.1%	0.2%	0.2%	0.2%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%
Peaches	1.8%	0.9%	0.3%	0.9%	0.1%	0.2%	0.1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%
Avocados	2.3%	0.5%	1.2%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	4.4%
Watermelons	1.4%	1.2%	0.8%	0.2%	0.2%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%
Pears	1.7%	0.9%	0.2%	0.4%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%
Lemons	1.5%	0.4%	0.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%
Pineapples	1.0%	0.4%	0.5%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
Strawberries	0.6%	0.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%
Litchis	0.7%	0.3%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Oranges	0.6%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Sweet Melons	0.4%	0.1%	0.4%	0.0%	0.0%	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%	0.0%	0.0%	0.0%	0.0%	0.7%
Muskmelons	0.4%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Kiwifruit	0.2%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Prunes	0.1%	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%	0.0%	0.4%
Other Fruits	0.8%	0.4%	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%
Grand Total	40.8%	20.0%	13.8%	10.8%	3.2%	2.7%	2.4%	2.1%	1.4%	1.2%	1.1%	0.2%	0.2%	0.1%	0.0%	100.0%

Source: DALRRD (2024)

This shift is attributed to the harvest season, which commences in November and peaks between December and February. The distribution of smallholder market access estimates for fruits in terms of markets follows a similar distribution with the vegetables; Johannesburg emerges as the leading market with a market share of 40.8%, followed by Tshwane with 20%, Cape Town with 13.8%, and Durban with 10.8%. These markets contribute 85.4% of the smallholder market access estimates, while others account for 14.6%. 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.

The distribution of smallholder market access estimates in terms of volume is illustrated in **Table 5**. It is important to note that the distribution of these estimates varies from revenue because some fruits, despite being high in weight, do not necessarily translate to high revenue. For instance, smallholder market access estimates show that bananas and apples, which are ranked first and second in terms of volumes, contribute 15.3% and 7.5% respectively. They are followed by watermelons and mangoes a, contributing 6% and 5.2%, respectively. Plums contribute 2.9%. Collectively, these five fruits contribute to 36.9% of the smallholder market access estimates in terms of volume. While fruits ranked between sixth and twentieth position contribute 13.1%, while other fruits contribute 50% of market share in terms of volume supplied. The distribution in terms of markets considering volume supplied is the same as the distribution considering revenue.

Table 5: Smallholder Market Access Estimates for Fruits (% Ton)

COMMODITY	MARKET															Grand Total
	JHB	TSH	CPT	DBN	SPR	BFN	EL	PMB	KDP	WLK	PE	KIM	WBK	VER	NLS	
Bananas	4.9%	3.2%	2.1%	1.7%	0.5%	0.6%	0.7%	0.5%	0.4%	0.3%	0.4%	0.0%	0.1%	0.0%	0.0%	15.3%
Apples	3.8%	1.4%	0.4%	1.0%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	7.5%
Watermelons	1.4%	1.6%	1.4%	0.2%	0.8%	0.2%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%
Mangoes	1.8%	1.1%	0.8%	0.6%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%
Plums	1.3%	0.5%	0.1%	0.6%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%
Grapes	1.1%	0.4%	0.2%	0.4%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
Pears	1.0%	0.5%	0.1%	0.3%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
Nectarines	0.7%	0.3%	0.2%	0.2%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%
Peaches	0.6%	0.3%	0.1%	0.3%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Pineapples	0.6%	0.3%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Lemons	0.6%	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%	0.0%	1.2%
Avocados	0.6%	0.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Oranges	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Sweet Melons	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Muskmelons	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Litchis	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Papayas	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Strawberries	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Limes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Prunes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Fuits	19.1%	10.1%	6.7%	5.8%	2.0%	1.6%	1.2%	1.1%	0.8%	0.8%	0.5%	0.1%	0.1%	0.0%	0.0%	50.0%
Grand Total	38.2%	20.3%	13.4%	11.5%	3.9%	3.2%	2.5%	2.2%	1.6%	1.5%	1.1%	0.2%	0.2%	0.1%	0.0%	100.0%

Source: DALRRD (2024)

4. PRICES - JANUARY 2024

The prices of selected fruits and vegetables across chosen National Fresh Produce Markets were compared for December 2023 and January 2024, as presented in **Table 6**. Potatoes experienced a 6.5% decrease in price, with the price per ton decreasing from R7 908.50 in December 2023 to R7 394.08 in January 2024. This decline could be due to factors such as oversupply or decreased demand during this period. Onions experienced a 9.4% decrease in price, with the price per ton decreasing from R4 226.00 in December 2023 to R3 829.62 in January 2024. This decrease could be attributed to changes in market conditions or supply dynamics.

Table 6: December 2023 to January 2024 price changes for selected fruits and vegetables.

Commodity	January 2024-R/T	December 2023-R/T	% Change (m/m)
POTATOES	7394.08	7908.5	-6.5%
ONIONS	3829.62	4226	-9.4%
TOMATOES	10429.3	10558.2	-1.2%
APPLES	11921.7	12557.2	-5.1%
BANANAS	7763.1	11357.3	-31.6%

Source: DALRRD (2023)

Tomatoes experienced a slight decrease in price, with the price per ton dropping from R10 558.20 in December 2023 to R10 429.30 in January 2024, resulting in a 1.2% change. This decline could indicate market adjustments or changes in supply and demand dynamics. Apples experienced a 5.1% decrease in price, with the price per ton decreasing from R12 557.20 in December 2023 to R11 921.70 in January 2024. This decrease could be due to seasonal factors or changes in market conditions. Bananas experienced a significant 31.6% decrease in price, with the price per ton decreasing from R11 357.30 in December 2023 to R7 763.10 in January 2024.

6. CONCLUSION

The January 2024 smallholder market access estimate report reveals that the total revenue generated by smallholder farmers from fruits and vegetables is R573 891 095.60, with a total mass of 74 710 tons. This report shows the importance of policy recommendations that promote market access and transformation. Market access remains concentrated in major cities like Johannesburg, Tshwane, Cape Town, and Durban, limiting smallholder farmers' reach and exposing them to volatile market dynamics. The dominance of a few commodities, including potatoes, tomatoes, onions, peppers, carrots, bananas, and apples, indicates a lack of diversity in the market, increasing vulnerability to price fluctuations and market saturation.

One of the concerning trends highlighted in the report is the month-on-month decline in prices for key commodities such as potatoes, onions, tomatoes, apples, and bananas. This trend could potentially reduce profit margins for smallholder farmers, who already face challenges such as limited access to resources, infrastructure, and market information. To address these issues, stakeholders must consider expanding market channels to facilitate access to regional and national markets, supporting diversification efforts through technical assistance and financial support and investing in infrastructure such as storage facilities, transportation and networks.

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