SMALLHOLDER MARKET ACCESS ESTIMATES

FEBRUARY 2024

National Agricultural Marketing Council

www.namc.co.za

TABLE OF CONTENT

LIST OF TABLES

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
SMAE	Smallholder Market Access Estimates
TSH	Tshwane
VER	Vereeniging
WBK	Witbank
WLK	Welkom

1. BACKGROUND

This report analyses Smallholder Market Access Estimates (SAME) across National Fresh Produce Markets (NFPMs) in South Africa during February 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 is on the top 20 performing fruits and vegetables sold across these 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 FEBRUARY 2024

This section details the Smallholder Market Access Estimate (SMAE) for fruits and vegetables in revenue across different NFPMs during February 2024, as illustrated in Table 1. The vegetable market outperformed the fruit market during this period, generating revenue of R345 million from selling 22 001 tonnes of produce. In comparison, the fruit market generated revenue of R219 million from selling 53 526 tonnes of produce. This trend was consistent across most markets, with vegetables consistently surpassing fruits in both revenue and quantity. Comparing the month-on-month changes, the market value of fruits decreased by 1.34% and vegetables by 1.68%. However, the volume of fruits increased by 0.58% and vegetables by 1.31%.

Table 1: Comparative revenue and mass of fruits and vegetables

Market	Fruit		Vegetable	
	Rand	Tonne	Rand	Tonne
JHB	93 975 019	8 644	155 496 700	24 211
TSH	44 579 593	4 658	63 488 506	10 704
CPT	26 432 182	2 620	38 652 357	5 014
DBN	23 058 853	2 347	33 530 125	4 909
SPR	5 889 349	705	11 100 193	1 880
EL	6 220 504	664	8 327 563	1 205
BFN	5 672 813	599	8 051 081	1 305
PMB	4 330 388	566	4 279 760	690
KDP	3 477 687	431	6 647 735	1 089
WKM	2 266 539	308	5 438 923	862
PE	2 117 480	276	6 864 161	1 033
WBK	443 259	62	1 004 992	180
KIM	442 732	53	919 154	154
VER	364 857	52	1 107 314	189
GRJ	80 697	17	750 285	101
Total February 2024	**219 351 952**	**22 001**	**345 658 850**	**53 526**
Total January 2024	**222 330 053**	**21 874**	**351 561 042**	**52 836**
M/M % Change	**-1.34%**	**0.58%**	**-1.68%**	**1.31%**

Source: DALRRD (2024)

3. VEGETABLES – FEBRUARY 2024

This report section focuses on the Smallholder Market Access Estimate (SMAE) for the top twenty vegetables across selected fresh produce markets based on revenue and volume sold. The data reveals the presence of 96 different vegetables across 15 fresh produce markets, of which only the top twenty have been visualised. The remaining vegetables have been categorised under the 'Other vegetable' category. **Table 2** illustrates the SMAE of various vegetables across different markets. The values in the table represent the SMAE revenue percentage for each selected fresh produce market vegetable. Each row represents a different vegetable, while each column represents a different National Fresh Produce Market.

Additionally, the SMAE for vegetables in terms of revenue (R345,658,850) is presented in percentages to explain market share distribution per commodity and sales channel. The analysis reveals that potatoes dominate the market with a 44.13% share, followed by tomatoes at 14.81% and onions at 11.42%. Peppers and carrots contribute 4.6% and 4.39%, respectively. These five vegetables collectively account for approximately 79.35% of the SMAE. Vegetables ranked sixth to twentieth position, contribute 16.24%, while others constitute approximately 4.41%.

The SMAE is concentrated in four markets, namely Johannesburg (JHB), Tshwane (TSH), Durban (DBN), and Cape Town (CPT). Johannesburg stands out with a 44.9% market share, followed by Tshwane (18.37%), Cape Town (11.8%), and Durban (9.70%). These four markets account for 84.7% of smallholder market access estimates, while the remaining 15.7% is distributed among other markets. Aggregating the markets' contribution by province reveals that Gauteng Province (JHB, TSH, and VER) dominates with 63.68% of smallholder market access estimates, followed by KwaZulu-Natal Province (DBN and PMB) at 10.94%. These findings suggest that Gauteng and KwaZulu-Natal provinces are the most popular destinations for fresh produce.

Table 3 illustrates the distribution of smallholder market access estimates regarding volume sold. Notably, the distribution of smallholder market access estimates in terms of volume may differ from that of revenue, as certain vegetables, despite being high in weight, may not necessarily translate to high revenue. The SMAE for vegetables in terms of volume (53 526 tonnes) is presented in percentages to explain market share distribution per commodity and sales channel. The analysis reveals that potatoes and onions are ranked first and second in volume, contributing 41.17% and 17.66%, respectively, followed by tomatoes at 10.27%, cabbage at 6.63%, and carrots at 5.93%. Collectively, these vegetables amount to 81.66% of the smallholder market access estimates in terms of volume, and the distribution across markets follows a similar trend as the distribution in terms of revenue.

Table 2: Smallholder market access estimates for vegetables (% Rands)

COMMODITY	MARKETS															GRAND TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PE	KDP	WLKM	PMB	VER	WBK	KIM	GRJ	
POTATOES	17.91%	8.19%	4.13%	4.40%	2.13%	1.33%	1.19%	1.18%	1.10%	0.99%	0.85%	0.27%	0.22%	0.12%	0.11%	44.13%
TOMATOES	6.77%	2.68%	1.97%	1.26%	0.41%	0.26%	0.41%	0.25%	0.32%	0.25%	0.09%	0.02%	0.02%	0.08%	0.02%	14.81%
ONIONS	5.75%	1.89%	0.88%	1.54%	0.21%	0.30%	0.20%	0.18%	0.12%	0.11%	0.15%	0.02%	0.02%	0.01%	0.04%	11.42%
PEPPERS	2.21%	0.91%	0.73%	0.38%	0.08%	0.10%	0.05%	0.05%	0.04%	0.02%	0.01%	0.00%	0.01%	0.00%	0.00%	4.60%
CARROTS	2.04%	0.73%	0.46%	0.50%	0.08%	0.23%	0.08%	0.13%	0.06%	0.03%	0.01%	0.00%	0.00%	0.02%	0.02%	4.39%
CABBAGE	1.16%	0.64%	0.12%	0.24%	0.08%	0.04%	0.14%	0.02%	0.10%	0.09%	0.01%	0.01%	0.01%	0.02%	0.00%	2.68%
LETTUCE	1.21%	0.50%	0.23%	0.29%	0.02%	0.01%	0.05%	0.01%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	2.35%
ENGLISH	1.04%	0.32%	0.39%	0.00%	0.02%	0.01%	0.03%	0.00%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	1.83%
BUTTERNUT	0.83%	0.31%	0.35%	0.16%	0.02%	0.05%	0.01%	0.06%	0.01%	0.00%	0.02%	0.00%	0.00%	0.00%	0.01%	1.82%
BEETROOT	0.74%	0.30%	0.07%	0.05%	0.03%	0.03%	0.03%	0.02%	0.05%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	1.34%
GREEN BEANS	0.46%	0.20%	0.11%	0.03%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.84%
PUMPKINS	0.35%	0.13%	0.12%	0.01%	0.02%	0.01%	0.05%	0.03%	0.04%	0.03%	0.00%	0.00%	0.00%	0.01%	0.01%	0.81%
SWEET	0.31%	0.18%	0.17%	0.01%	0.02%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.72%
GARLIC	0.36%	0.11%	0.13%	0.06%	0.02%	0.00%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.72%
BROCCOLI	0.42%	0.15%	0.11%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.70%
SWEETCORN	0.35%	0.12%	0.10%	0.04%	0.01%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.63%
CAULIFLOWER	0.34%	0.11%	0.11%	0.05%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.63%
GINGER	0.32%	0.10%	0.13%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.62%
CHILLIES	0.29%	0.10%	0.06%	0.05%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.55%
OTHER	2.12%	0.69%	0.80%	0.57%	0.05%	0.01%	0.04%	0.04%	0.04%	0.02%	0.03%	0.00%	0.01%	0.00%	0.01%	4.41%
GRAND TOTAL	**44.99%**	**18.37%**	**11.18%**	**9.70%**	**3.21%**	**2.41%**	**2.33%**	**1.99%**	**1.92%**	**1.57%**	**1.24%**	**0.32%**	**0.29%**	**0.27%**	**0.22%**	**100.00%**

Source: DALRRD (2024)

Table 3: Smallholder market access estimates for vegetables (% Tonnes)

COMMODITY	MARKET															GRAND TOTAL
	JHB	TSH	CPT	DBN	SPR	BFN	EL	KDP	PE	WKM	PMB	VER	WBK	KIM	GRJ	
POTATOES	16.83%	7.77%	3.44%	4.22%	2.07%	1.09%	1.19%	1.01%	1.04%	0.95%	0.84%	0.27%	0.22%	0.11%	0.09%	**41.17%**
ONIONS	8.99%	3.18%	1.34%	1.95%	0.41%	0.30%	0.41%	0.22%	0.26%	0.20%	0.24%	0.04%	0.05%	0.02%	0.05%	**17.66%**
TOMATOES	4.62%	1.89%	1.40%	0.85%	0.33%	0.29%	0.18%	0.23%	0.18%	0.14%	0.06%	0.02%	0.02%	0.06%	0.01%	**10.27%**
CABBAGE	2.87%	2.01%	0.25%	0.38%	0.23%	0.35%	0.05%	0.22%	0.06%	0.12%	0.02%	0.02%	0.01%	0.05%	0.00%	**6.63%**
CARROTS	2.86%	1.11%	0.53%	0.64%	0.14%	0.10%	0.24%	0.09%	0.13%	0.06%	0.01%	0.00%	0.00%	0.01%	0.01%	**5.93%**
BUTTERNUT	1.61%	0.62%	0.69%	0.27%	0.04%	0.02%	0.07%	0.01%	0.08%	0.00%	0.04%	0.00%	0.00%	0.00%	0.01%	**3.46%**
PEPPERS	1.34%	0.73%	0.45%	0.21%	0.05%	0.03%	0.05%	0.03%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	**2.93%**
PUMPKINS	1.29%	0.37%	0.22%	0.02%	0.05%	0.10%	0.02%	0.10%	0.05%	0.06%	0.00%	0.00%	0.00%	0.01%	0.01%	**2.32%**
BEETROOT	1.13%	0.49%	0.06%	0.07%	0.04%	0.03%	0.03%	0.06%	0.03%	0.02%	0.00%	0.00%	0.01%	0.00%	0.00%	**1.99%**
LETTUCE	0.81%	0.20%	0.07%	0.17%	0.03%	0.04%	0.00%	0.00%	0.01%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	**1.35%**
ENGLISH	0.58%	0.19%	0.14%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.95%**
SWEET	0.49%	0.24%	0.12%	0.01%	0.03%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.91%**
HUBBARD	0.46%	0.18%	0.01%	0.00%	0.03%	0.03%	0.00%	0.02%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.76%**
GEM	0.19%	0.03%	0.22%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.46%**
CHILLIES	0.22%	0.10%	0.03%	0.05%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	**0.43%**
SPINACH	0.01%	0.29%	0.01%	0.04%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	**0.41%**
GREEN BEANS	0.14%	0.16%	0.04%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.38%**
SWEETCORN	0.07%	0.05%	0.04%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.20%**
OKRA/BINDI	0.09%	0.08%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.18%**
CAULIFLOWER	0.08%	0.03%	0.03%	0.02%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.17%**
OTHER FRUITS	0.57%	0.27%	0.27%	0.24%	0.02%	0.03%	0.00%	0.02%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	**1.45%**
Grand Total	**45.23%**	**20.00%**	**9.37%**	**9.17%**	**3.51%**	**2.44%**	**2.25%**	**2.03%**	**1.93%**	**1.61%**	**1.29%**	**0.35%**	**0.34%**	**0.29%**	**0.19%**	**100.00%**

Source: DALRRD 2024

4. FRUITS – FEBRUARY 2024

This section shows the estimated smallholder market access for the top twenty fruits across selected fresh produce markets based on revenue and volume sold. In this data, 60 different fruits are found across 15 fresh produce markets. However, only the top twenty fruits are visualised, and others are grouped in the 'Other fruit' category. The smallholder market access estimates of various fruits across different markets are illustrated in **Table 4**. Additionally, the SMAE for fruits in terms of revenue (R219 351 952) is visualised in percentages to explain distribution per market and commodity. Bananas and apples dominate the fruit market, accounting for 25.28% and 14.9% of SMAE, respectively. Grapes, mangoes, and nectarines have improved in rankings compared to January and February 2024, contributing approximately 14.90%, 10.61%, and 8.08%, respectively. 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 across outlets follows a similar trend as vegetables. Johannesburg emerges as the leading market with a 42.84% market share, followed by Tshwane with 20.32%, Cape Town with 12.05%, and Durban with 10.51%. These four markets contribute 85.73% of the SMAE, while others account for 14.27%. 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**. In this analysis, the SMAE for fruits in terms of volume (22 001 tonnes) is presented in percentages to explain the distribution across markets and commodities. It is essential to note that the distribution of these estimates varies from revenue, as 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, ranked first and second in terms of volumes, contribute 35.85% and 15.55%, respectively. They are followed by watermelons at 9.0%, grapes at 5.97%, and mangoes at 5.86%. Collectively, these fruits contribute to 72.23% of the smallholder market access estimates in terms of volume. While fruits ranked sixth to twentieth position hold a 27.01% market share by volume, other fruits only reach 0.78%. The distribution across markets, considering the volume supplied, mirrors the pattern when analysed by revenue.

Table 4: Smallholder market access estimates for fruits (% Rand)

COMMODITY	MARKETS															GRAND TOTAL
	JHB	TSH	CPT	DBN	EL	SPR	BFN	PMB	KDP	WLKM	PE	WBK	KIM	VER	GRJ	
BANANAS	8.17%	5.13%	4.11%	2.40%	1.14%	0.92%	0.73%	0.71%	0.53%	0.36%	0.74%	0.14%	0.08%	0.11%	0.01%	**25.28%**
APPLES	6.91%	3.49%	0.79%	1.48%	0.36%	0.49%	0.46%	0.30%	0.34%	0.21%	0.00%	0.02%	0.04%	0.02%	0.00%	**14.90%**
GRAPES	5.71%	1.95%	0.65%	1.44%	0.11%	0.18%	0.20%	0.07%	0.17%	0.09%	0.02%	0.00%	0.01%	0.01%	0.00%	**10.61%**
MANGOES	3.83%	1.65%	0.69%	1.04%	0.18%	0.21%	0.15%	0.09%	0.12%	0.06%	0.00%	0.03%	0.04%	0.00%	0.00%	**8.08%**
NECTARINES	2.74%	1.55%	0.53%	0.92%	0.44%	0.30%	0.39%	0.37%	0.15%	0.08%	0.01%	0.00%	0.00%	0.00%	0.00%	**7.48%**
PLUMS	2.70%	1.09%	0.27%	1.00%	0.15%	0.18%	0.08%	0.18%	0.04%	0.04%	0.01%	0.00%	0.00%	0.01%	0.00%	**5.75%**
AVOCADOS	2.00%	0.55%	1.43%	0.12%	0.06%	0.09%	0.08%	0.02%	0.04%	0.02%	0.08%	0.00%	0.00%	0.00%	0.01%	**4.49%**
PEARS	1.62%	0.93%	0.16%	0.49%	0.11%	0.16%	0.14%	0.13%	0.06%	0.06%	0.00%	0.00%	0.01%	0.01%	0.00%	**3.88%**
PEACHES	1.45%	0.76%	0.36%	0.68%	0.16%	0.08%	0.05%	0.09%	0.02%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	**3.69%**
WATERMELONS	1.43%	0.98%	0.46%	0.22%	0.03%	0.01%	0.15%	0.00%	0.07%	0.10%	0.01%	0.00%	0.01%	0.00%	0.01%	**3.48%**
PINEAPPLES	1.16%	0.44%	0.45%	0.26%	0.06%	0.04%	0.07%	0.01%	0.01%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	**2.54%**
LEMONS	0.76%	0.22%	0.30%	0.19%	0.02%	0.03%	0.03%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	**1.57%**
STRAWBERRIES	0.47%	0.33%	0.46%	0.09%	0.00%	0.01%	0.02%	0.00%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	**1.40%**
ORANGES	0.90%	0.18%	0.27%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**1.35%**
SWEET MELONS	0.47%	0.09%	0.23%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.83%**
MUSKMELONS	0.50%	0.10%	0.08%	0.03%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	**0.74%**
PAPAYAS	0.39%	0.17%	0.05%	0.02%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.64%**
LITCHIS	0.10%	0.16%	0.14%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.41%**
KIWIFRUIT	0.15%	0.06%	0.07%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.31%**
DRAGON FRUIT	0.17%	0.07%	0.02%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.27%**
OTHER FRUITS	1.23%	0.43%	0.54%	0.07%	0.00%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**2.30%**
GRAND TOTAL	**42.84%**	**20.32%**	**12.05%**	**10.51%**	**2.84%**	**2.68%**	**2.59%**	**1.97%**	**1.59%**	**1.03%**	**0.97%**	**0.20%**	**0.20%**	**0.17%**	**0.04%**	**100%**

Source: DALRRD (2024)

Table 5: Smallholder market access estimates for fruits (% Tonne)

COMMODITY	MARKETS															GRAND TOTAL
	JHB	TSH	CPT	DBN	SPR	BFN	EL	KDP	PE	WLKM	PMB	VER	WBK	KIM	GRJ	
BANANAS	11.29%	7.45%	5.04%	3.66%	1.36%	1.08%	1.71%	0.96%	0.93%	0.60%	1.25%	0.18%	0.22%	0.11%	0.01%	**35.85%**
APPLES	6.97%	3.69%	0.76%	1.79%	0.55%	0.44%	0.32%	0.36%	0.00%	0.22%	0.36%	0.03%	0.02%	0.03%	0.00%	**15.55%**
WATERMELONS	2.72%	2.60%	2.13%	0.33%	0.21%	0.33%	0.10%	0.18%	0.06%	0.22%	0.00%	0.00%	0.01%	0.04%	0.05%	**9.00%**
GRAPES	3.18%	1.04%	0.39%	0.83%	0.10%	0.14%	0.05%	0.07%	0.02%	0.08%	0.04%	0.01%	0.00%	0.00%	0.00%	**5.97%**
MANGOES	2.76%	1.36%	0.41%	0.69%	0.15%	0.10%	0.09%	0.10%	0.04%	0.05%	0.07%	0.00%	0.02%	0.02%	0.00%	**5.86%**
PLUMS	2.79%	1.00%	0.22%	0.98%	0.16%	0.09%	0.13%	0.03%	0.02%	0.05%	0.24%	0.01%	0.00%	0.00%	0.00%	**5.73%**
PEARS	2.05%	1.23%	0.22%	0.69%	0.25%	0.16%	0.15%	0.11%	0.00%	0.09%	0.24%	0.01%	0.01%	0.01%	0.00%	**5.22%**
NECTARINES	1.22%	0.67%	0.28%	0.47%	0.16%	0.19%	0.22%	0.08%	0.01%	0.05%	0.25%	0.00%	0.00%	0.00%	0.00%	**3.59%**
PINEAPPLES	1.24%	0.49%	0.54%	0.31%	0.04%	0.05%	0.09%	0.01%	0.02%	0.01%	0.01%	0.00%	0.00%	0.01%	0.00%	**2.83%**
LEMONS	1.12%	0.38%	0.47%	0.34%	0.05%	0.03%	0.02%	0.01%	0.01%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	**2.45%**
AVOCADOS	1.25%	0.34%	0.51%	0.05%	0.09%	0.05%	0.02%	0.03%	0.04%	0.02%	0.02%	0.00%	0.00%	0.00%	0.01%	**2.43%**
PEACHES	0.81%	0.36%	0.18%	0.43%	0.06%	0.03%	0.08%	0.01%	0.07%	0.00%	0.08%	0.00%	0.00%	0.00%	0.00%	**2.12%**
ORANGES	0.46%	0.10%	0.17%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.74%**
SWEET MELONS	0.30%	0.05%	0.16%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	**0.54%**
MUSKMELONS	0.24%	0.05%	0.07%	0.02%	0.00%	0.01%	0.03%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.44%**
PAPAYAS	0.20%	0.06%	0.04%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	**0.31%**
STRAWBERRIES	0.07%	0.08%	0.06%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.24%**
GRAPEFRUIT	0.11%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.14%**
LIMES	0.06%	0.02%	0.05%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.13%**
LITCHIS	0.03%	0.03%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.10%**
OTHER FRUITS	0.41%	0.15%	0.17%	0.02%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	**0.78%**
Grand Total	**39.29%**	**21.17%**	**11.91%**	**10.67%**	**3.20%**	**2.72%**	**3.02%**	**1.96%**	**1.26%**	**1.40%**	**2.57%**	**0.24%**	**0.28%**	**0.24%**	**0.08%**	**100.00%**

Source: DALRRD (2024)

5. PRICES - FEBRUARY 2024

This section presents an overview of selected fruit price movements from January 2024 to February 2024 in Johannesburg (JHB), Tshwane (TSH), Cape Town (CPT), and Durban (DBN) based on **Table 6.** In Johannesburg, there was a month-on-month price increase for apples (4%), onions (4%), tomatoes (1%), and watermelons (7%). On the other hand, the prices of potatoes (3%) and bananas (10%) fell. Tshwane reported price declines for apples (24%), bananas (10%), and watermelons (4%), respectively. At the same time, onion and potato prices increased by 1%. All selected fruits and vegetables in Cape Town recorded a month-on-month price decline. Durban exhibited varied price movements, with apples rising by 7%, while bananas experienced a decrease (13%), indicating potential oversupply. Onions experienced a significant increase (16%), while potatoes and tomatoes exhibited opposing trends, with an 8% decrease and an 8% increase, respectively. These variations likely stem from diverse market forces in Durban. Watermelons showed the most significant increase (36%) in Durban, suggesting a major shift in market conditions or consumer demand.

Table 6: Month-on-month price changes for selected fruits and vegetables.

Market	Commodity	February 2024-R/T	January 2024-R/T	M/M
JHB	APPLES	9 873	9 458	4%
	BANANAS	7 213	8 021	-10%
	ONIONS	4 128	3 967	4%
	POTATOES	6 871	7 094	-3%
	TOMATOES	9 477	9 388	1%
	WATERMELONS	5 245	4 892	7%
TSH	APPLES	9 438	12 405	-24%
	BANANAS	6 861	7 617	-10%
	ONIONS	3 831	3 786	1%
	POTATOES	6 807	7 209	-6%
	TOMATOES	9 146	9 078	1%
	WATERMELONS	3 750	3 894	-4%
CPT	APPLES	10 349	13 215	-22%
	BANANAS	8 127	9 664	-16%
	ONIONS	4 251	4 390	-3%
	POTATOES	7 757	8 318	-7%
	TOMATOES	9 078	9 417	-4%
	WATERMELONS	2 149	2 713	-21%
DBN	APPLES	8 230	7 689	7%
	BANANAS	6 541	7 542	-13%
	ONIONS	5 114	4 407	16%
	POTATOES	6 739	7 315	-8%
	TOMATOES	9 606	8 921	8%
	WATERMELONS	6 746	4 965	36%

Source: DALRRD (2024)

6. CONCLUSION

The February 2024 Smallholder Market Access Estimate report reveals that the total revenue generated by smallholder farmers from fruits and vegetables is R565 010 802, with a total mass of 75 527 tonnes. 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 the reach of smallholder farmers and exposing them to volatile market dynamics. Moreover, this situation can be exacerbated by the dominance of a few commodities, including potatoes, tomatoes, onions, peppers, carrots, bananas, and apples.

Fruit and vegetable prices in Johannesburg, Tshwane, Cape Town, and Durban showed mixed price movements from January to February 2024. Johannesburg recorded increased prices for apples, onions, tomatoes, and watermelons but decreased prices for potatoes and bananas. Tshwane experienced declines in the prices of apples, bananas, and watermelons while onion and potato prices rose slightly. Cape Town saw price decreases across all commodities. Durban exhibited varied price movements, with rising apple prices, a significant decline in banana prices, a sharp increase in onion prices, opposing trends for potato and tomato prices, and an increase in watermelon prices.

The presented data shows the concentration of market access in major markets, limiting opportunities for smallholders and exposing them to volatility. The dominance of a few commodities indicates a lack of diversity in the market, increasing susceptibility to price fluctuations. The varying fruit price movements across Johannesburg, Tshwane, Cape Town, and Durban illustrate the complex dynamics present in NFPMs.

Bernard Manganyi
Enquiries: +27 12 341 1115
bmanganyi@namc.co.za

Compiled by Bernard Manganyi

DALRRD is acknowledged for the assistance provided to the NAMC regarding the data.

entity are for informational purposes only and do not constitute or imply approval, endorsement, or favouring by the NAMC.

GET IN TOUCH

536 Francis Baard Street,
Meintjiesplein Building,
Block A, 4th Floor, Arcadia,
0007

Private Bag X935, Pretoria, 0001

012 341 1115

info@namc.co.za

www.namc.co.za