



SMALLHOLDER MARKET ACCESS ESTIMATES

QUARTER TWO 2024

*National Agricultural
Marketing Council*



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ABBREVIATIONS

BFN	Bloemfontein
CT	Cape Town
DALRRD	Department of Agriculture, Land Reform and Rural Development
DBN	Durban
EL	East London
GEO	George
GDARD	Gauteng Department of Agriculture and Rural Development
JHB	Johannesburg
KDP	Klerksdorp
KIM	Kimberly
NAMC	National Agricultural Marketing Council
NFPM	National Fresh Produce Market
NLP	Nelspruit
PE	Port Elizabeth
PMB	Pietermaritzburg
SPR	Springs
SAUFM	South African Union of Food Markets
SA GAP	South African Good Agricultural Practices
SMAE	Smallholder Market Access Estimates
TSH	Tshwane
VER	Vereeniging
WBK	Witbank
WLK	Welkom

1. BACKGROUND

This report estimates smallholder market access at National Fresh Produce Markets (NFPMs) in South Africa from June 2024 to August 2024. Market access for smallholder farmers refers to their ability to reach and sell products in various markets, meeting standards for quality, safety, quantity, and consistency. The report aligns with the recommendations in the National Agricultural Marketing Council's (NAMC) Section 7 Committee report on fresh produce markets, which was set to be achieved in 2014. The recommendations are that, first, 30% of volumes be traded through black commission market agents; secondly, at least 25% of existing agencies incorporate Black Economic Empowerment (BEE) involvement or participation; thirdly, each market is tasked with identifying five black salespeople known for their integrity and capabilities, with the potential to transition into market agents; and finally, ensuring that 50% of market masters are black.

The Competition Commission's Fresh Produce Market Inquiry Provisional Report suggests that small, medium and micro enterprises account for less than 1% of proceeds in the NFPM. The SMAE focuses on 15 NFPMs, primarily 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 because they account for approximately 97% of the total volume traded and 97% of the revenue generated in NFPMs.

2. OVERVIEW OF FRESH PRODUCE MARKETS

The smallholder market access estimates from June to August 2024 across various national fresh produce markets in South Africa focus on total revenues and tonnage of fruits and vegetables. **Table 1** shows the total estimated income generated from fruits and vegetables in the various markets between June and August 2024. Over this period, the revenue analysis for various markets shows significant growth in most markets from June to August 2024. The total revenue across all markets increased from R526.5 million in June to R613.3 million in July, marking a substantial increase in market activity. The total revenue increased to R650.6 million in August, indicating continued growth. Johannesburg, Tshwane, Durban and Cape Town markets drive much revenue growth. However, there are disparities in performance, with some markets showing signs of stagnation or decline, particularly Vereeniging, East London, Pietermaritzburg, Port Elizabeth, and George.

Table 2 shows the total estimated volume in tons supplied to the National Fresh Produce Market between June and August 2024. The total SMAE tonnage grew from **243 thousand tons** in June to 270 thousand tons in July, representing an 11.6% increase. However, the tonnage declined to 258 thousand tons in August, a 4.6% decline from the July peak. This suggests that while July saw peak performance in most markets, August experienced a cooling down, possibly due to market saturation, seasonal factors, or supply chain disruptions. Additionally, the combined average contribution of Johannesburg, Tshwane, Cape Town, and Durban accounted for approximately 81.7% of the total volume of produce traded each month from June to August 2024.

Table 1: Total estimated revenue generated from fruits and vegetables

MARKET	SMAE (R)	SMAE (R)	SMAE (R)	Av %Δ	Av %Δ
	JUNE 2024	JULY 2024	AUGUST 2024	(JUNE-JULY)	(JULY-AUGUST)
JOHANNESBURG	R244 589 512.29	R282 469 334.76	R306 986 298.41	15%	8%
TSHWANE	R98 615 594.60	R115 585 692.31	R123 502 859.83	17%	6%
CAPE TOWN	R52 002 431.75	R64 339 283.93	R64 866 699.74	22%	1%
DURBAN	R49 663 691.23	R57 190 332.10	R60 579 117.66	15%	6%
SPRINGS	R16 762 383.01	R20 211 470.84	R21 250 218.68	21%	5%
EAST LONDON	R13 824 895.71	R15 230 227.99	R14 750 820.85	10%	-3%
BLOEMFONTEIN	R12 105 409.44	R14 484 389.31	R15 283 205.96	20%	5%
KLERKSDORP	R9 638 485.41	R10 467 404.18	R11 460 263.09	9%	9%
PIETERMARITZBURG	R8 145 715.58	R10 174 843.25	R9 897 958.28	25%	-3%
PORT ELIZABETH	R8 121 591.90	R8 813 753.94	R7 850 142.42	9%	-12%
WELKOM	R7 812 819.30	R9 525 696.38	R9 887 905.35	22%	4%
WITBANK	R1 598 287.31	R1 773 156.03	R1 569 166.03	11%	-13%
VEREENIGING	R1 186 475.10	R1 003 233.60	R1 057 604.40	-15%	5%
GEORGE	R1 032 564.65	R1 267 781.54	R1 023 098.73	23%	-24%
KIMBERLEY	R783 852.90	R812 984.40	R675 560.85	4%	-20%
TOTAL	R526 483 710.17	R613 349 584.56	R650 640 920.25	16%	6%

Table 2: Total estimated volume of fruits and vegetables

MARKET	SMAE (Ton)	SMAE (Ton)	SMAE (Ton)	Av %Δ	Av %Δ
	JUNE 2024	JULY 2024	AUGUST 2024	(JUNE-JULY)	(JULY-AUGUST)
JOHANNESBURG	109 943.71	121 606.87	117 598.77	10.61%	-3.30%
TSHWANE	48 136.16	53 646.42	53 177.19	11.45%	-0.87%
DURBAN	21 999.20	24 802.88	24 199.05	12.74%	-2.43%
CAPE TOWN	21 407.92	24 770.17	22 008.27	15.71%	-11.15%
SPRINGS	8 992.80	10 462.95	9 580.16	16.35%	-8.44%
EAST LONDON	6 158.95	6 598.38	5 953.08	7.13%	-9.78%
BLOEMFONTEIN	6 140.12	6 983.25	6 399.33	13.73%	-8.36%
KLERKSDORP	5 187.96	5 211.17	5 187.50	0.45%	-0.45%
PIETERMARITZBURG	4 359.05	5 338.52	4 708.51	22.47%	-11.80%
WELKOM	4 038.95	4 770.87	4 356.43	18.12%	-8.69%
PORT ELIZABETH	3 747.77	3 884.13	3 174.26	3.64%	-18.28%
WITBANK	845.03	975.81	710.18	15.48%	-27.22%
VEREENIGING	721.91	579.05	497.66	-19.79%	-14.06%
GEORGE	504.48	617.29	396.12	22.36%	-35.83%
KIMBERLEY	454.48	490.89	377.77	8.01%	-23.04%
TOTAL	242 638.54	270 738.67	258 324.31	11.58%	-4.59%

3. VEGETABLES – JUNE TO AUGUST 2024

This report section focuses on the smallholder market access estimates for the top 20 vegetables across selected fresh produce markets based on revenue and volume from June to August 2024. The data entails 96 vegetables across 15 fresh produce markets, of which only the top 20 have been presented. The remaining vegetables have been categorised under the ‘Other vegetable’ category. We averaged the data within the period June to August 2024. **Table 3** illustrates smallholder market access estimates 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 NFPM. Therefore, during the period in question, the average SMAE for vegetables in terms of revenue is **R336 million**. This revenue is further analysed to explain market share distribution per commodity and market.

The SMAE shows that potatoes dominate the market with a 40.77% share, followed by onions at 16.39% and tomatoes at 13.04%. Peppers and carrots contribute 5.59% and 3.68%, respectively. These five vegetables collectively account for approximately 79.47% of the smallholder market access estimates (SMAE). This domination of the five top vegetables is concerning because many farmers might face market access constraints regarding other vegetables. Vegetables ranked sixth to twentieth, contributing 17.68%, while others constitute approximately 2.85%.

The SMAE is concentrated in four markets: Johannesburg (JHB), Tshwane (TSH), Cape Town (CPT), and Durban (DBN). Johannesburg stands out with a 46.71% market share, followed by Tshwane (18.41%), Cape Town (10.28%), and Durban (9.02%). These four markets account for 84.42% of smallholder market access estimates, while the remaining 15.58% is distributed among other markets. Aggregating the markets’ contribution by province shows that Gauteng province (JHB, TSH, and VER) dominates smallholder market access estimates by 47.11%, followed by KwaZulu-Natal province (DBN and PMB) at 10.95%. These findings suggest that Gauteng and KwaZulu-Natal provinces are the major destinations for fresh produce.

Table 4 illustrates the distribution of average SMAEs of the total volume supplied at different NFPMs during the period in question. The average SMAE for vegetables in volume, which is **579 000 tons**, is presented in percentages to explain market share distribution per commodity and sales channel. Potatoes rank first, contributing 44.13% of the total volume, followed by onions at 16.22%. Tomatoes rank third at 9.83%, followed by cabbage at 7.13% and carrots at 5.83%. Collectively, these five commodities represent 83.14% of the SMAE in terms of volume. The distribution across NFPMs also shows significant market concentration, with the Johannesburg market accounting for the largest share at 46.18%, followed by Tshwane at 19.83%, and then Cape Town at 8.71%.

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	KDP	WLK	PE	PMB	WBK	GEO	VER	KIM	
POTATOES	17.10%	7.74%	3.68%	3.76%	2.13%	1.19%	1.01%	0.97%	0.84%	0.74%	0.88%	0.23%	0.15%	0.20%	0.05%	40.77%
ONIONS	8.05%	2.85%	1.26%	2.01%	0.38%	0.49%	0.27%	0.21%	0.17%	0.29%	0.26%	0.03%	0.04%	0.02%	0.02%	16.39%
TOMATOES	6.34%	2.03%	1.68%	0.97%	0.45%	0.21%	0.42%	0.32%	0.30%	0.22%	0.05%	0.01%	0.02%	0.00%	0.01%	13.04%
PEPPERS	2.91%	1.11%	0.76%	0.47%	0.06%	0.09%	0.06%	0.05%	0.03%	0.04%	0.02%	0.00%	0.00%	0.00%	0.00%	5.59%
CARROTS	1.58%	0.65%	0.38%	0.47%	0.07%	0.20%	0.09%	0.06%	0.03%	0.10%	0.03%	0.00%	0.01%	0.00%	0.01%	3.68%
CABBAGE	1.42%	0.71%	0.21%	0.26%	0.14%	0.06%	0.19%	0.11%	0.15%	0.02%	0.01%	0.02%	0.00%	0.00%	0.02%	3.34%
BUTTERNUT SQUASHES	0.99%	0.41%	0.22%	0.09%	0.02%	0.06%	0.02%	0.00%	0.01%	0.02%	0.02%	0.00%	0.00%	0.00%	0.00%	1.86%
ENGLISH CUCUMBERS	0.92%	0.32%	0.25%	0.00%	0.01%	0.00%	0.03%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.56%
BEETROOT	0.77%	0.33%	0.06%	0.06%	0.04%	0.03%	0.04%	0.05%	0.02%	0.02%	0.00%	0.00%	0.00%	0.00%	0.01%	1.43%
LETTUCE	0.62%	0.23%	0.15%	0.15%	0.03%	0.01%	0.02%	0.00%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	1.22%
PUMPKINS	0.38%	0.17%	0.16%	0.01%	0.03%	0.02%	0.08%	0.05%	0.05%	0.03%	0.00%	0.01%	0.01%	0.00%	0.01%	0.99%
SWEET POTATOES	0.45%	0.22%	0.15%	0.02%	0.02%	0.01%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%
GREEN BEANS	0.48%	0.19%	0.14%	0.03%	0.01%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.87%
CHILLIES	0.49%	0.16%	0.07%	0.07%	0.01%	0.00%	0.01%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.83%
GINGER	0.42%	0.11%	0.11%	0.03%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.69%
BABY MARROWS	0.48%	0.00%	0.11%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.62%
BROCCOLI	0.40%	0.11%	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%	0.61%
CAULIFLOWER	0.33%	0.08%	0.11%	0.05%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.59%
GARLIC	0.31%	0.11%	0.09%	0.06%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.59%
SWEETCORN	0.39%	0.10%	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%	0.58%
OTHER VEGETABLES	1.89%	0.78%	0.54%	0.46%	0.04%	0.02%	0.03%	0.03%	0.01%	0.03%	0.02%	0.01%	0.00%	0.00%	0.00%	3.86%
TOTAL	46.71%	18.41%	10.28%	1.02%	3.44%	2.40%	2.32%	1.88%	1.61%	1.54%	1.34%	0.31%	0.25%	0.23%	0.12%	100%

Table 4: Smallholder market access estimates for vegetables (% Tons)

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	KDP	WLK	PE	PMB	WBK	GEO	VER	KIM	
POTATOES	18.67%	8.42%	3.72%	3.94%	2.42%	1.23%	1.09%	1.08%	0.93%	0.79%	1.04%	0.25%	0.18%	0.24%	0.06%	44.13%
ONIONS	8.27%	3.02%	1.03%	1.80%	0.41%	0.41%	0.25%	0.22%	0.16%	0.24%	0.26%	0.04%	0.03%	0.02%	0.02%	16.22%
TOMATOES	4.86%	1.54%	1.28%	0.75%	0.38%	0.13%	0.28%	0.22%	0.20%	0.14%	0.04%	0.01%	0.01%	0.00%	0.00%	9.83%
PEPPERS	1.33%	0.63%	0.30%	0.19%	0.02%	0.03%	0.02%	0.03%	0.01%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	2.59%
CARROTS	2.76%	1.11%	0.46%	0.73%	0.12%	0.23%	0.12%	0.09%	0.04%	0.12%	0.03%	0.00%	0.01%	0.00%	0.01%	5.83%
CABBAGE	2.97%	1.90%	0.37%	0.55%	0.26%	0.13%	0.39%	0.21%	0.17%	0.06%	0.04%	0.03%	0.00%	0.00%	0.05%	7.13%
BUTTERNUTSQUASHES	1.68%	0.67%	0.43%	0.13%	0.04%	0.07%	0.03%	0.00%	0.01%	0.02%	0.03%	0.00%	0.01%	0.00%	0.00%	3.13%
ENGLISH CUCUMBERS	0.43%	0.14%	0.10%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.70%
BEETROOT	1.04%	0.44%	0.06%	0.07%	0.06%	0.03%	0.04%	0.05%	0.02%	0.02%	0.00%	0.00%	0.00%	0.00%	0.01%	1.84%
LETTUCE	0.35%	0.20%	0.06%	0.16%	0.04%	0.00%	0.02%	0.00%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.86%
PUMPKINS	1.30%	0.49%	0.28%	0.03%	0.06%	0.02%	0.16%	0.11%	0.11%	0.06%	0.00%	0.01%	0.01%	0.00%	0.01%	2.67%
SWEET POTATOES	0.46%	0.26%	0.19%	0.02%	0.02%	0.01%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	1.00%
GREEN BEANS	0.18%	0.11%	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%	0.35%
CHILLIES	0.17%	0.09%	0.02%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.33%
GINGER	0.06%	0.02%	0.02%	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%
BABY MARROWS	0.10%	0.00%	0.05%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.16%
BROCCOLI	0.09%	0.05%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.16%
CAULIFLOWER	0.10%	0.04%	0.04%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%
GARLIC	0.02%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.04%
SWEETCORN	0.05%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
OTHER VEGETABLES	1.28%	0.68%	0.23%	0.23%	0.05%	0.01%	0.03%	0.03%	0.01%	0.01%	0.02%	0.01%	0.00%	0.00%	0.01%	2.63%
TOTAL	46.18%	19.83%	8.71%	8.70%	3.90%	2.30%	2.47%	2.06%	1.68%	1.50%	1.50%	0.36%	0.25%	0.27%	0.18%	100.00%

4. FRUITS – JUNE TO AUGUST 2024

This section shows the estimated smallholder market access for the top 20 fruits across selected fresh produce markets based on revenue and volume sold. This data shows that 60 different fruits are found across 15 fresh produce markets. However, only the top 20 fruits are presented, and others are grouped in the ‘Other fruit’ category. The smallholder market access estimates of various fruits across different markets are illustrated in **Table 5**. We averaged the data in the period from June to August 2024. The average SMAE for fruits in terms of revenue, **R173 million**, is presented in percentages to explain distribution per market and commodity.

Bananas and apples dominate the fruit market, accounting for 28.18% and 17.71% of the SMAE, respectively. This is followed by grapes, oranges, and avocados, which hold market shares of approximately 6.55%, 5.87%, and 5.63%, respectively. These top five fruit commodities collectively contribute to 63.94% of the SMAEs in terms of market share. Meanwhile, fruits ranked sixth to twentieth, holding a 32.43% market share by volume, while other fruits only account for 3.63%.

Johannesburg emerges as the leading market with a 44.78% market share, followed by Tshwane with 19.83%, Cape Town with 11.27%, and Durban with 9.94%. These four markets contribute 85.82% of the SMAE, while others account for 14.18%. The continued dominance of Johannesburg, Tshwane, Cape Town, and Durban in the smallholder market share can be attributed to factors outlined in the previous section.

The distribution of SMAEs in terms of volume is illustrated in **Table 6**. In this analysis, the SMAE for fruits in terms of volume, which is **192 000 tons**, is presented in percentages to explain the distribution across markets and commodities. SMAEs show that bananas and apples, ranked first and second in terms of volumes, contribute 34.25% and 18.44%, respectively. Oranges follow them at 9.09%, pears at 5.16%, and watermelons at 4.46%. Collectively, these fruits contribute 70.40% of the SMAEs in terms of volume. Meanwhile, fruits ranked sixth to twentieth, holding a 28.60% market share by volume, while other fruits only account for 1.34%. The distribution across markets, considering the volume supplied, mirrors the pattern when analysed by revenue.

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PMB	KDP	WLK	PE	WBK	KIM	VER	GEO	
BANANAS	9.17%	5.67%	4.31%	2.80%	0.98%	1.46%	0.87%	0.90%	0.54%	0.39%	0.83%	0.14%	0.05%	0.05%	0.01%	28.18%
APPLES	8.29%	4.08%	0.83%	1.81%	0.72%	0.40%	0.50%	0.36%	0.35%	0.28%	0.00%	0.02%	0.04%	0.02%	0.00%	17.71%
GRAPES	3.78%	1.21%	0.35%	0.76%	0.09%	0.06%	0.12%	0.05%	0.07%	0.05%	0.01%	0.00%	0.00%	0.00%	0.00%	6.55%
ORANGES	2.81%	1.02%	0.55%	0.63%	0.14%	0.09%	0.21%	0.13%	0.12%	0.13%	0.02%	0.00%	0.01%	0.01%	0.00%	5.87%
AVOCADOS	2.70%	0.78%	1.55%	0.11%	0.12%	0.05%	0.11%	0.01%	0.08%	0.04%	0.05%	0.00%	0.00%	0.00%	0.01%	5.63%
PEARS	2.10%	1.18%	0.19%	0.54%	0.20%	0.13%	0.14%	0.16%	0.09%	0.07%	0.00%	0.00%	0.01%	0.01%	0.00%	4.83%
MANGOES	1.56%	0.69%	0.45%	0.44%	0.09%	0.06%	0.07%	0.03%	0.04%	0.03%	0.01%	0.00%	0.01%	0.00%	0.00%	3.50%
NAARTJIES (MANDARINS)	2.37%	0.14%	0.17%	0.07%	0.07%	0.00%	0.11%	0.10%	0.06%	0.06%	0.00%	0.00%	0.00%	0.00%	0.00%	3.14%
STRAWBERRIES	1.38%	0.53%	0.40%	0.24%	0.01%	0.01%	0.02%	0.00%	0.00%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	2.61%
EXOTIC CITRUS	0.65%	0.98%	0.22%	0.74%	0.05%	0.03%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	2.72%
PINEAPPLES	1.21%	0.47%	0.38%	0.30%	0.04%	0.06%	0.07%	0.02%	0.02%	0.01%	0.02%	0.00%	0.01%	0.00%	0.00%	2.60%
NECTARINES	0.94%	0.49%	0.19%	0.28%	0.08%	0.10%	0.13%	0.10%	0.04%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	2.38%
PLUMS	1.07%	0.31%	0.11%	0.36%	0.07%	0.07%	0.04%	0.09%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	2.16%
PEACHES	0.70%	0.38%	0.15%	0.33%	0.04%	0.08%	0.03%	0.07%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.80%
WATERMELONS	0.79%	0.49%	0.22%	0.09%	0.01%	0.01%	0.08%	0.00%	0.03%	0.05%	0.00%	0.00%	0.01%	0.00%	0.00%	1.78%
LEMONS	0.92%	0.24%	0.26%	0.17%	0.03%	0.01%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.68%
PAPAYAS	0.60%	0.23%	0.05%	0.03%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.92%
MUSKMELONS	0.68%	0.11%	0.05%	0.01%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.88%
SWEET MELONS	0.58%	0.08%	0.14%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.82%
KIWIFRUIT	0.37%	0.09%	0.09%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.60%
OTHER FRUITS	2.11%	0.67%	0.60%	0.18%	0.01%	0.02%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.63%
TOTAL	44.78%	19.83%	11.27%	9.94%	2.75%	2.66%	2.57%	2.06%	1.48%	1.17%	1.02%	0.18%	0.15%	0.10%	0.03%	100%

Table 6: Smallholder market access estimates for fruits (% Tons)

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PMB	KDP	WLK	PE	WBK	KIM	VER	GEO	
BANANAS	11.14%	7.31%	4.59%	3.46%	1.30%	1.61%	1.06%	1.26%	0.82%	0.53%	0.84%	0.18%	0.06%	0.08%	0.01%	34.25%
APPLES	8.43%	4.12%	0.82%	2.19%	0.77%	0.38%	0.49%	0.45%	0.38%	0.33%	0.00%	0.02%	0.04%	0.02%	0.00%	18.44%
ORANGES	4.00%	1.70%	0.78%	1.03%	0.28%	0.16%	0.35%	0.25%	0.20%	0.25%	0.05%	0.01%	0.01%	0.02%	0.00%	9.09%
NAARTJIES (MANDARINS)	2.36%	0.15%	0.26%	0.10%	0.08%	0.00%	0.12%	0.14%	0.07%	0.08%	0.00%	0.00%	0.00%	0.00%	0.00%	3.35%
PEARS	2.11%	1.22%	0.21%	0.62%	0.23%	0.13%	0.15%	0.22%	0.13%	0.10%	0.00%	0.00%	0.01%	0.01%	0.00%	5.16%
AVOCADOS	2.01%	0.60%	0.75%	0.07%	0.12%	0.03%	0.08%	0.02%	0.07%	0.05%	0.03%	0.01%	0.00%	0.00%	0.01%	3.85%
GRAPES	1.53%	0.46%	0.15%	0.36%	0.04%	0.02%	0.08%	0.03%	0.03%	0.04%	0.01%	0.00%	0.00%	0.00%	0.00%	2.75%
LEMONS	1.44%	0.44%	0.52%	0.28%	0.06%	0.01%	0.03%	0.02%	0.01%	0.01%	0.02%	0.00%	0.00%	0.00%	0.00%	2.85%
WATERMELONS	1.42%	1.14%	0.89%	0.22%	0.24%	0.16%	0.15%	0.00%	0.06%	0.11%	0.03%	0.00%	0.02%	0.00%	0.02%	4.46%
PINEAPPLES	1.16%	0.44%	0.32%	0.30%	0.03%	0.08%	0.05%	0.02%	0.01%	0.01%	0.02%	0.00%	0.01%	0.00%	0.00%	2.47%
MANGOES	1.10%	0.61%	0.34%	0.32%	0.07%	0.04%	0.06%	0.03%	0.03%	0.04%	0.02%	0.01%	0.01%	0.00%	0.00%	2.69%
PLUMS	0.98%	0.37%	0.09%	0.37%	0.06%	0.05%	0.03%	0.09%	0.01%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	2.09%
EXOTIC CITRUS	0.71%	1.10%	0.26%	0.75%	0.06%	0.03%	0.02%	0.01%	0.01%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	2.99%
NECTARINES	0.41%	0.20%	0.11%	0.14%	0.04%	0.05%	0.06%	0.06%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	1.09%
PEACHES	0.39%	0.20%	0.09%	0.20%	0.03%	0.04%	0.02%	0.05%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.03%
PAPAYAS	0.34%	0.10%	0.03%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%
MUSKMELONS	0.33%	0.06%	0.04%	0.01%	0.00%	0.02%	0.01%	0.00%	0.00%	0.00%	0.08%	0.00%	0.00%	0.00%	0.00%	0.55%
SWEET MELONS	0.26%	0.04%	0.10%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%	0.45%
STRAWBERRIES	0.25%	0.10%	0.07%	0.05%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.48%
KIWIFRUIT	0.07%	0.02%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.12%
OTHER FRUITS	0.70%	0.29%	0.22%	0.07%	0.02%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.34%
TOTAL	41.15%	20.67%	10.67%	10.57%	3.43%	2.83%	2.78%	2.65%	1.85%	1.56%	1.17%	0.23%	0.18%	0.14%	0.07%	100%

5. AVERAGE PRICES OF SELECTED FRUITS AND VEGETABLES

Table 7: Average prices of selected fruits and vegetables

COMMODITY	JUNE	JULY	AUGUST	JUNE-JULY	JULY-AUGUST
APPLES	R8 992.37	R10 125.58	R9 559.31	-12.60%	-5.59%
AVOCADOS	R12 567.29	R12 703.75	R13 911.43	1.09%	9.51%
BANANAS	R7 609.16	R6 879.76	R7 302.92	-9.59%	6.15%
CABBAGE	R3 619.20	R3 359.13	R4 172.40	-7.19%	24.21%
GRAPES	R12 325.96	R21 535.93	R19 022.18	74.72%	11.67%
ONIONS	R9 041.72	R7 718.56	R6 112.94	-14.63%	-20.80%
ORANGES	R5 264.17	R5 224.18	R5 576.68	0.76%	6.75%
PEPPERS	R12 675.20	R19 003.90	R22 062.71	49.93%	16.10%
POTATOES	R5 914.75	R10 590.70	R7 917.48	79.06%	-25.24%
TOMATOES	R9 634.20	R10 857.20	R10 825.29	12.69%	-0.29%

- Grapes and potatoes experienced the most significant price increases, particularly from June to July.
- Onions and cabbage experienced a substantial price decline throughout the period.
- Apples, bananas, oranges, tomatoes, and avocados exhibited more moderate price fluctuations.
- Peppers consistently showed upward price trends.

6. CASE STUDY

In 2022/2023, the NAMC successfully linked 190 smallholder farmers with various markets across South Africa. These farmers are split between Gauteng (5%), Free State (82%), and KwaZulu-Natal (13%). The research team of the Market and Economic Research Centre's (MERC) smallholder market access unit randomly selected farmers from the list connected to the markets to monitor the effects of the market access facilitation programme.

Owing to resource constraints, the study team conducted a brief phone survey. Sixteen farmers were successfully sampled during this operation. The sampled farmers' demographic data is displayed in **Table 8**. According to the data, eight female and eight male farmers are represented equally in terms of gender. The farmers range in age from 30 to 75 years old. The average age for both male and female farmers is about 53 years old. This demonstrates the inclusion of farmers of all ages. Based on the provincial distribution of these farmers, it can be observed that the majority hail from the Free State (6), KwaZulu-Natal (6), and then Gauteng (4).

As shown in **Table 8**, beans and maize are the most common commodities, as they are produced and marketed by six farmers out of a sample of 16 farmers. Other commodities, such as cabbage and spinach, exhibit a moderate presence, with a frequency of three. They are not as common as maize and beans but are still essential to the market. At least two farmers sell beetroot, sweet potatoes, potatoes, and pumpkins in the sample of 16 farmers. Many vegetables, such as butternut squash, chillies, and sweet peppers, were only named once. This suggests less frequent output, indicating developing trends or specialised markets. The low frequency can indicate difficulties or room for development in these fields.

Table 8: Description of data

GENDER	AGE	RACE	PROVINCE	COMMODITY
Female	38	Black	Free State	Spinach and beetroot
Female	30	Black	Gauteng	Spinach, sweet peppers, chillies, butternut squash, cabbage, gherkins, parsley, and coriander
Female	75	Black	KwaZulu-Natal	Beans, maize, sweet potatoes, and butternuts
Female	75	Black	KwaZulu-Natal	Vegetables, beans, maize, sweet potatoes, and butternuts
Female	30	Black	Gauteng	Lettuce, butternut, spring onion, and micro-greens
Female	73	Black	KwaZulu-Natal	Maize, potatoes, beans, and pumpkins
Female	50	Black	Free State	Vegetables
Female	40	Black	Free State	Tomatoes, cabbage, peppers, and onions
Male	74	Black	Free State	Corn, soybeans, cabbage, beetroot, and pumpkin
Male	40	Black	Free State	Beans, spinach, and cabbage
Male	41	Black	KwaZulu-Natal	Chicory and vegetables
Male	50	Black	KwaZulu-Natal	Livestock (cattle, goats and poultry)
Male	67	Black	Free State	Vegetables
Male	66	Black	Gauteng	Maize and sugar beans
Male	47	Black	KwaZulu-Natal	Maize and beans
Male	40	Black	Gauteng	Beans and maize

Source: NAMC (2024)

6.1 MARKET PERCEPTION

As presented in **Table 9**, the market access indicators reflect varied farmers' perceptions regarding the new market to which they have been linked. Farmers who experienced increased distance to the market faced challenges with accessibility and reported mixed levels of satisfaction. For some, the increased distance created significant obstacles, leading to frustration and difficulty reaching the market regularly. However, despite these challenges, satisfaction levels ranged from neutral to very satisfied, especially among farmers who saw improved sales, prices, and overall income.

Conversely, farmers who found the new market closer or more accessible generally reported a more effortless experience with market access. These farmers, benefiting from reduced travel time and costs, expressed higher satisfaction. Many noted that this proximity led to tangible benefits, such as increased sales and better prices, directly contributing to their income growth. However, seven farmers expressed a neutral position towards the new market, indicating that while they acknowledged some benefits, their overall experience was neither overwhelmingly positive nor negative. In contrast, two farmers noted dissatisfaction with the new market, pointing to difficulties that overshadowed potential gains. Despite the varying perspectives, the data suggests proximity to the market is crucial in shaping farmers' experiences and satisfaction levels.

Table 9: Market access indicators

GENDER	DISTANCE CHANGE	MARKET ACCESS	SALES INCREASE	PRICE INCREASE	INCOME INCREASE	OVERALL SATISFACTION REGARDING THE NEW MARKET
Female	Increased	No change	Yes	No	No	Somewhat satisfied
Female	Decreased	No change	No	No	No	Somewhat dissatisfied
Female	Decreased	Easier	No	No	No	Neutral
Female	Increased	Somewhat difficult	Yes	Yes	Yes	Very satisfied
Male	No change	Much easier	Yes	Yes	Yes	Very satisfied
Female	Increased	Somewhat difficult	Yes	Yes	Yes	Very satisfied
Male	Decreased	Easier	Yes	Yes	Yes	Satisfied
Male	No change	No change	Yes	Yes	Yes	Somewhat satisfied
Male	No change	No change	No	No	No	Neutral
Male	No change	No change	No	No	No	Very dissatisfied
Female	No change	Somewhat difficult	No	No	No	Neutral
Female	Increased	Much more difficult	Yes	Yes	Yes	Neutral
Male	Increased	Somewhat easier	Yes	Yes	Yes	Neutral
Female	No change	Somewhat easier	Yes	No	Yes	Neutral
Male	No change	Much easier	No	Yes	No	Somewhat satisfied

Source: NAMC (2024)

6.2 CHALLENGES AND INTERVENTIONS

Farmers encountered a range of challenges when engaging with a new market. The most frequently cited issue, reported by ten farmers, was the difficulty transporting their produce. This transportation problem directly impacted the timeliness and quality of their goods, leading to delays and often compromising the condition of the produce by the time it reached the market. The delays and compromised condition of the produce significantly affected the farmers' overall market performance. Without reliable transport, they struggled to maintain consistency and competitiveness.

Another common challenge was the market's lack of proper storage facilities, as noted by six farmers. The absence of these facilities meant that farmers had little control over preserving the freshness and quality of their produce, especially for items that require temperature control.

Additionally, unfavourable market prices were reported with equal frequency, further constraining farmers' profitability. The inability to store produce properly and low market prices often resulted in reduced income, limiting their ability to invest in future production cycles.

Meeting the stringent quality or quantity requirements posed yet another obstacle, as mentioned by six farmers. The high standards set by the market required farmers to consistently produce large volumes of top-quality goods, which many found difficult given the limited resources. This added pressure only intensified their challenges in maintaining their foothold in the market.

Communication with buyers also proved problematic for some, with four farmers highlighting difficulties in negotiating and finalising deals, often due to barriers to effective communication. Finally, two farmers expressed frustration over unclear or unfair market regulations, suggesting that inconsistent rules or perceived unfair practices created confusion and further complications, undermining their confidence in the market's integrity.

Farmers have outlined specific areas where they require support to overcome these hurdles. The most requested assistance includes access to advanced farming equipment, such as tractors and irrigation systems, which would help improve the efficiency and output of their farms. Additionally, transportation remains a critical need, with many farmers, especially those producing crops such as baby spinach, seeking help securing reliable and cost-effective transport options. Storage facilities were also emphasised as a priority, with farmers calling for introducing cold storage units, mobile storage options, and pack houses to help maintain the quality of their produce over extended periods. This infrastructure would give them more flexibility and control in managing their goods. Alongside this, farmers identified the need for quality inputs, such as seeds, fertilisers, and irrigation systems, which were essential to boosting their productivity and ensuring they could meet the demanding standards of the new market.

7. CONCLUSION

The SMEAs for fruits and vegetables from June to August 2024 reveal revenue and volume fluctuations. Total revenue increased from R526.5 million in June to R650.6 million in August, reflecting heightened market activity. The average SMAE revenue for vegetables reached R336 million, with potatoes at 40.77%, onions at 16.39%, and tomatoes at 13.04%, collectively comprising 79.47% of total SMAE revenue. The key markets accounted for 84.81% of revenue. In terms of volume, the SMAE averaged 579 thousand tons, with potatoes leading at 44.13%.

However, market access is concentrated in the four major markets in Johannesburg, Tshwane, Cape Town, and Durban, thus limiting opportunities for smallholder farmers. These four markets represent 84.42% of total SMAEs, raising concerns for farmers who grow less common vegetables.

In the fruit market from June to August 2024, the average revenue was R173 million, with bananas and apples holding 28.18% and 17.71% of the SMAE, respectively. The top five fruits, namely bananas, apples, grapes, oranges, and avocados., accounted for 63.94% of market share. The Johannesburg market was leading the market share for fruit at 44.78%.

In terms of volume, bananas and apples contributed 34.25% and 18.44%, respectively, totalling 192 000 tons. The trends indicate significant concentration, underscoring the need for strategies to improve access and diversify offerings for smallholder farmers.

The analysis of price trends from June to August 2024 reveals that grapes and potatoes experienced the most significant price increases, particularly between June and July. In contrast, onions and cabbage faced substantial price declines during this period. Apples, bananas, oranges, tomatoes, and avocados exhibited moderate price fluctuations, while peppers consistently demonstrated upward price trends.

A case conducted among 16 farmers showed equal gender representation and an average age of 53. Market access indicators showed varied perceptions, with those experiencing closer proximity to markets reporting higher satisfaction levels. However, challenges, such as transportation difficulties, lack of storage facilities, and unfavourable market prices, hindered their performance. Farmers strongly needed support in areas such as advanced farming equipment, reliable transport, and improved storage solutions to enhance their market access and competitiveness.

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