



NAMMC

Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES

QUARTER 4

2024/2025

*National Agricultural
Marketing Council*

www.namc.co.za



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ABBREVIATIONS

BFN	Bloemfontein
CT	Cape Town
DALRRD	Department of Agriculture, Land Reform and Rural Development
DBN	Durban
EL	East London
GRG	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

EXECUTIVE SUMMARY

15

Count of Market

95

Count of Vegetable

66

Count of Fruits

Total Revenue (R)



Category ● Vegetables ● Fruits

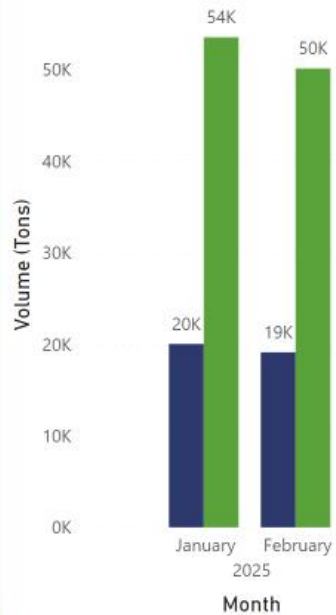
Total Volume (Tons)



Category ● Vegetables ● Fruits

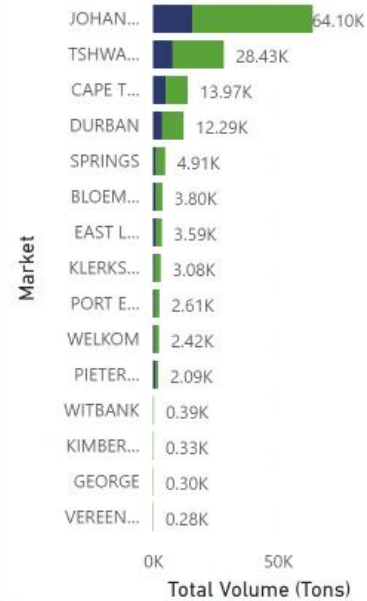
Total Volume per category (Tons)

Category ● Fruits ● Vegetables

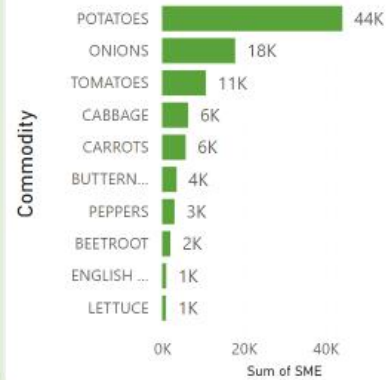


Total Volume Across Markets

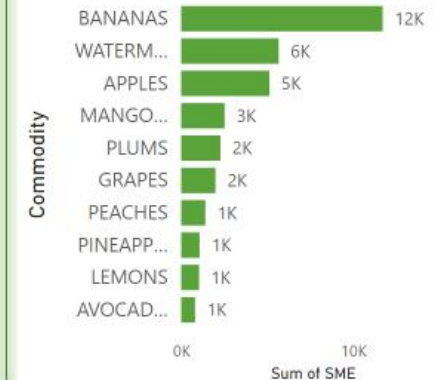
Categ... ● Fruits ● Vegetables



Top 10 Vegetables (Tons)

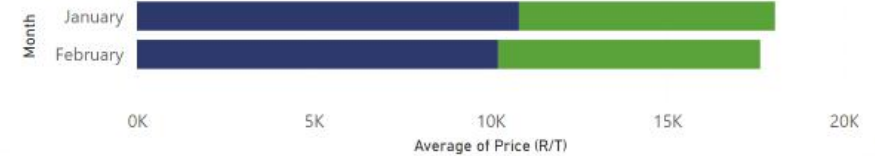


Top 10 Fruits (Tons)



Category ● Fruits ● Vegetables

Average Prices per Category (R/T)



1. BACKGROUND

This report estimates smallholder market access at National Fresh Produce Markets (NFPMs) in South Africa from January 2025 to February 2025. The focus is on the volume of fresh produce supplied by smallholder farmers to these markets, the revenue generated, and the average producer prices per ton. These estimations are informed by the National Agricultural Marketing Council's (NAMC) Section 7 Committee Report (2006), which recommended that 30% of volumes be traded through black commission market agents; at least 25% of existing agencies incorporate Black Economic Empowerment (BEE) involvement or participation; each market identify five black salespeople known for their integrity and capabilities, with the potential to transition into market agents; and ensure that 50% of market masters are black. Based on these recommendations, we estimate that approximately 30% of fresh produce at NFPMs is supplied by smallholder farmers. The Smallholder Market Access Estimates (SMAE) focus on 15 NFPMs, primarily examining the top 20 performing fruits and vegetables sold across these markets. This concentration is because these top 20 items account for approximately 97% of the total volume traded and 97% of the revenue generated in NFPMs. This analysis provides valuable insights into the participation of smallholder farmers in South Africa's formal fresh produce markets, highlighting the need for targeted interventions to enhance their market access and overall contribution to the agricultural sector.

2. OVERVIEW OF FRESH PRODUCE MARKETS

Figure 1 shows that the smallholder market estimate experienced a contraction in early 2025, with total revenues declining by 7.3% month-on-month from R610.6 million in January to R565.8 million in February. This broad-based downturn affected all market tiers, though with striking disparities in impact. The market continues to exhibit extreme concentration, with the big four urban markets (Johannesburg, Tshwane, Cape Town, and Durban) maintaining their collective 84% revenue share despite moderate declines of 6-10%, suggesting relatively stable demand fundamentals in core consumption centres. However, the picture becomes markedly different when examining medium-sized markets, where revenue declines by 22-25% in Welkom and Witbank, revealing acute vulnerability to economic pressures. This separated performance between core and peripheral markets likely reflects several structural factors: larger urban markets benefit from population density and established distribution networks that buffer against volatility, while smaller regional markets face compounded challenges, including higher demand elasticity and logistical inefficiencies, to mention a few.

Figure 2 shows the estimated total volume in tons supplied to the National Fresh Produce Markets by smallholder farmers between January and February 2025. The total volume decreased by 6%, from 73 thousand tons in January to 69.2 thousand tons in February. Among medium-sized markets, Port Elizabeth's volume decreased by 22%, while Welkom declined by 13%. Witbank recorded the most severe contraction, plummeting by 31%. The disproportionate declines in peripheral markets underscore smaller producers' challenges during market downturns.

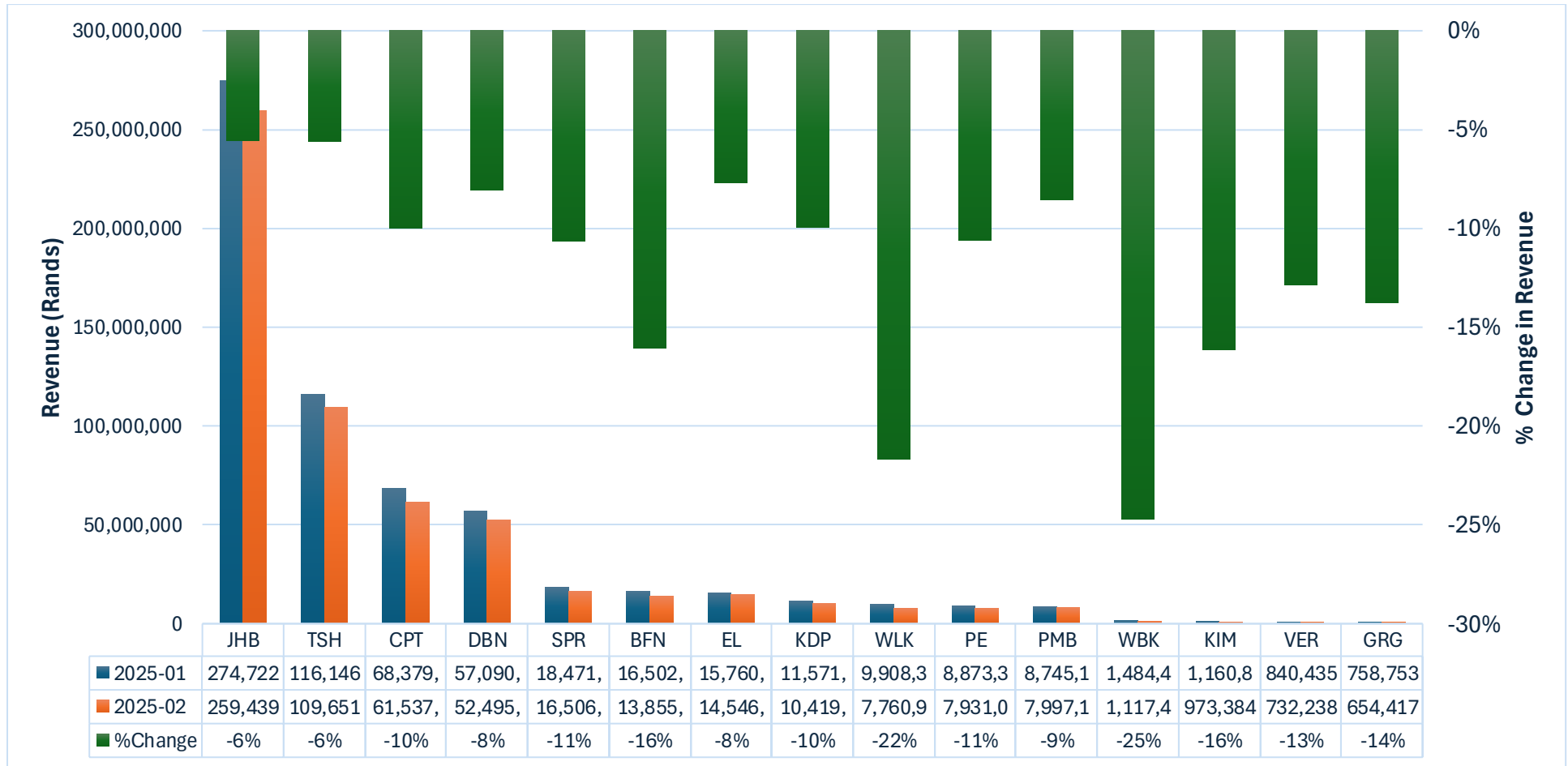


Figure 1: Total estimated revenue generated from fruits and vegetables

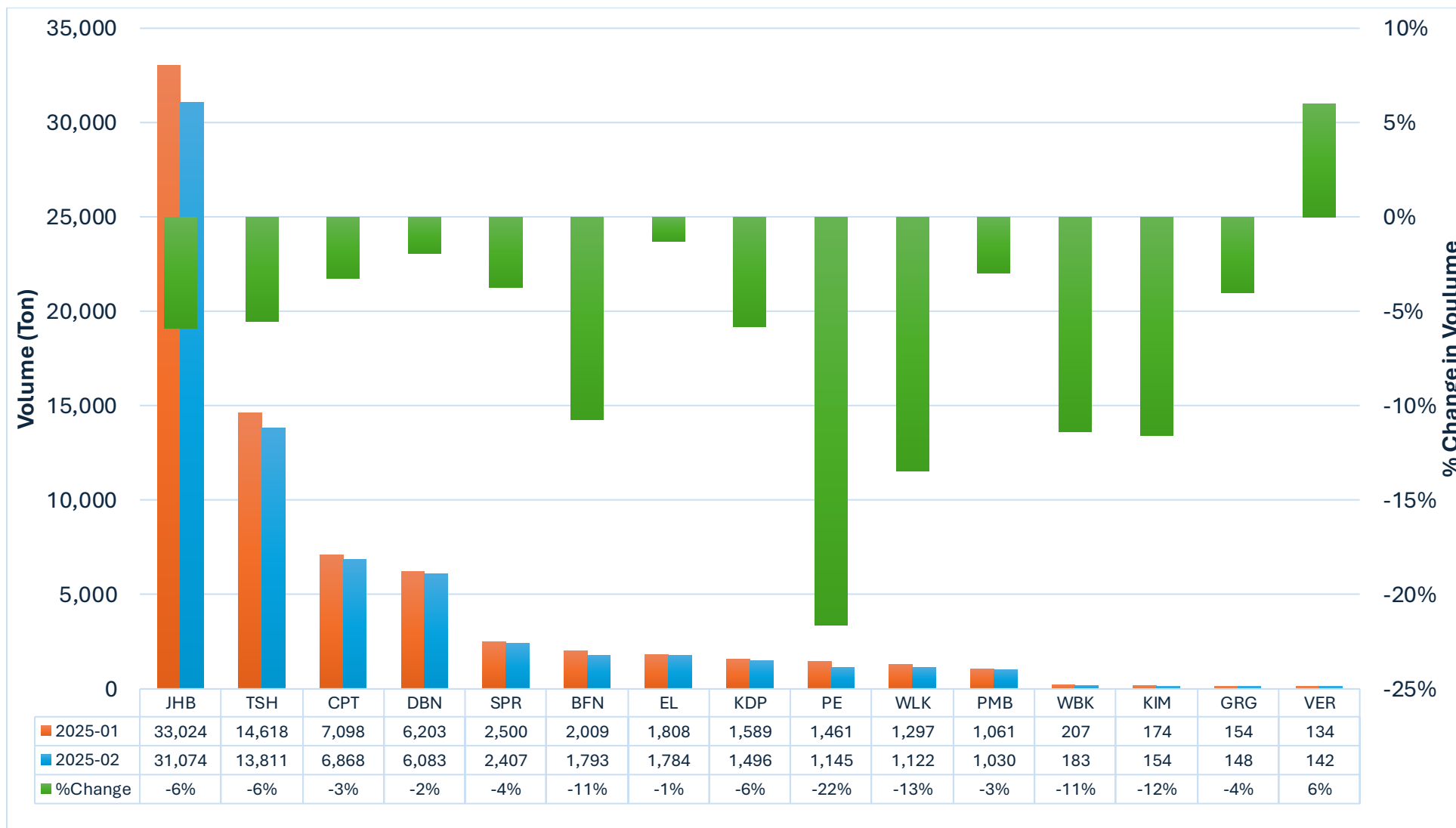


Figure 2: Total estimated volume of fruits and vegetables

3. VEGETABLES – JANUARY TO FEBRUARY 2025

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 January to February 2025. The data includes 96 vegetables from 15 fresh produce markets, of which only the top 20 are reviewed and analysed in this report. The remaining vegetables have been categorised as ‘Other vegetables’. We aggregated the data from January to February 2025. **Table 3** illustrates smallholder market access estimates for 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, and each column represents a different NFPM. Therefore, during the period in question, the aggregated SMAE for vegetables in terms of revenue is **R706.9 million**. This revenue is further analysed to determine market share distribution per commodity and market.

The SMAE shows that potatoes dominate the market with a 42.27% share, followed by tomatoes at 15.24% and onions at 10.70%. Peppers and carrots contribute 5.12% and 4.85%, respectively. These five vegetables collectively account for approximately 78.18% of the smallholder market access estimates. 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 18.14%, while others constituted approximately 3.68%.

The SMAE is concentrated in four markets: Johannesburg (JHB), Tshwane (TSH), Cape Town (CPT), and Durban (DBN). Johannesburg leads with a 46.20% market share, followed by Tshwane (18.95%), Cape Town (10.12%), and Durban (8.79%). These four markets account for 83.06% of smallholder market access estimates, while the remaining 16.94% 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 65.37%, followed by Western Cape Province at 10.12%. These findings suggest that Gauteng and Western Cape provinces are the major destinations for fresh produce.

Table 4 illustrates the distribution of aggregated SMAEs of the total volume supplied at different NFPMs from January to February 2025. The average SMAE for vegetables in volume, which is **103.64 thousand tons**, is presented in percentages to explain market share distribution per commodity and sales channel. Potatoes rank first, contributing 42.61% of the total volume, followed by onions at 17.26%. Tomatoes rank third at 10.34%, followed by cabbage at 6.15% and carrots at 5.56%. Collectively, these five commodities represent 81.92% 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 46.59%, followed by Tshwane at 19.77% and then Cape Town and Durban at 8.56% and 8.24%, respectively.

Table 1: Smallholder market access estimates for vegetables (% Rands)

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	BFN	EL	KDP	PE	WLK	PMB	WBK	KIM	GRG	VER	
POTATOES	17.85%	8.07%	3.55%	3.72%	1.99%	1.27%	1.23%	1.14%	1.03%	1.04%	0.73%	0.19%	0.14%	0.11%	0.20%	42.27%
TOMATOES	7.33%	2.70%	1.89%	1.14%	0.48%	0.42%	0.21%	0.40%	0.24%	0.30%	0.08%	0.02%	0.01%	0.02%	0.00%	15.24%
ONIONS	5.33%	1.99%	0.74%	1.31%	0.26%	0.17%	0.30%	0.14%	0.15%	0.11%	0.12%	0.02%	0.01%	0.03%	0.01%	10.70%
PEPPERS	2.51%	1.00%	0.83%	0.40%	0.07%	0.06%	0.10%	0.04%	0.06%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	5.12%
CARROTS	2.24%	0.96%	0.30%	0.58%	0.11%	0.10%	0.29%	0.08%	0.12%	0.03%	0.01%	0.00%	0.02%	0.01%	0.00%	4.85%
CABBAGE	1.37%	0.66%	0.18%	0.22%	0.13%	0.15%	0.06%	0.14%	0.01%	0.11%	0.01%	0.01%	0.02%	0.00%	0.00%	3.07%
LETTUCE	1.18%	0.53%	0.23%	0.35%	0.02%	0.07%	0.01%	0.00%	0.01%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	2.42%
BUTTERNUT SQUASHES	0.79%	0.36%	0.29%	0.12%	0.02%	0.01%	0.07%	0.01%	0.03%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	1.73%
ENGLISH CUCUMBERS	0.93%	0.30%	0.37%	0.00%	0.02%	0.03%	0.00%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.68%
BEETROOT	0.77%	0.32%	0.07%	0.07%	0.03%	0.04%	0.03%	0.05%	0.02%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	1.44%
PUMPKINS	0.40%	0.15%	0.15%	0.01%	0.02%	0.06%	0.02%	0.04%	0.04%	0.03%	0.00%	0.00%	0.01%	0.00%	0.00%	0.93%
GINGER	0.60%	0.13%	0.11%	0.05%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.91%
SWEET POTATOES	0.48%	0.19%	0.16%	0.02%	0.01%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%
GARLIC	0.41%	0.13%	0.09%	0.09%	0.04%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.78%
GREEN BEANS	0.43%	0.19%	0.10%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.78%
CHILLIES	0.39%	0.13%	0.07%	0.07%	0.02%	0.01%	0.00%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.72%
BROCCOLI	0.44%	0.16%	0.10%	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	0.33%	0.12%	0.13%	0.04%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.62%
HUBBARD SQUASHES	0.33%	0.17%	0.00%	0.00%	0.03%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.57%
BABY MARROWS	0.37%	0.00%	0.09%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.48%
CAULIFLOWER	0.26%	0.07%	0.10%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.48%
TOTAL	46.20%	18.95%	10.12%	8.79%	3.30%	2.49%	2.38%	2.12%	1.77%	1.70%	1.07%	0.26%	0.22%	0.19%	0.22%	100%

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	BFN	EL	KDP	PE	WKM	PMB	WBK	KIM	GRG	VER	
POTATOES	17.99%	8.34%	3.25%	3.61%	2.03%	1.30%	1.23%	1.17%	1.10%	1.07%	0.71%	0.19%	0.16%	0.11%	0.22%	42.61%
ONIONS	8.71%	3.46%	1.07%	1.83%	0.49%	0.27%	0.44%	0.23%	0.19%	0.18%	0.23%	0.04%	0.02%	0.05%	0.02%	17.26%
TOMATOES	4.94%	1.77%	1.31%	0.83%	0.33%	0.28%	0.15%	0.28%	0.16%	0.19%	0.07%	0.01%	0.01%	0.01%	0.00%	10.34%
CABBAGE	2.99%	1.33%	0.28%	0.37%	0.32%	0.32%	0.10%	0.22%	0.03%	0.10%	0.02%	0.02%	0.04%	0.00%	0.00%	6.15%
CARROTS	2.67%	1.08%	0.44%	0.60%	0.13%	0.10%	0.24%	0.09%	0.11%	0.05%	0.01%	0.01%	0.01%	0.01%	0.00%	5.56%
BUTTERNUT SQUASHES	1.90%	0.60%	0.52%	0.15%	0.05%	0.02%	0.08%	0.02%	0.03%	0.01%	0.04%	0.00%	0.00%	0.00%	0.00%	3.43%
PEPPERS	1.36%	0.75%	0.44%	0.17%	0.04%	0.03%	0.06%	0.03%	0.03%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	2.93%
PUMPKINS	1.14%	0.31%	0.21%	0.02%	0.05%	0.11%	0.02%	0.10%	0.06%	0.09%	0.01%	0.01%	0.01%	0.00%	0.01%	2.13%
BEETROOT	1.13%	0.41%	0.07%	0.11%	0.05%	0.04%	0.03%	0.05%	0.02%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	1.95%
HUBBARD SQUASHES	0.79%	0.35%	0.00%	0.00%	0.07%	0.03%	0.00%	0.05%	0.00%	0.04%	0.00%	0.00%	0.00%	0.00%	0.01%	1.35%
ENGLISH CUCUMBERS	0.56%	0.21%	0.15%	0.00%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.97%
LETTUCE	0.41%	0.19%	0.07%	0.17%	0.01%	0.04%	0.00%	0.00%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	0.91%
SWEET POTATOES	0.45%	0.20%	0.13%	0.01%	0.02%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.85%
SPINACH	0.28%	0.09%	0.01%	0.04%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.47%
CHILLIES	0.21%	0.10%	0.03%	0.05%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.40%
GEM SQUASHES	0.18%	0.04%	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.39%
GREEN BEANS	0.17%	0.13%	0.04%	0.01%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.37%
OKRA/BINDI	0.10%	0.10%	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%	0.22%
SWEETCORN	0.06%	0.04%	0.06%	0.02%	0.00%	0.00%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%
BRINJALS	0.06%	0.02%	0.04%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.15%
OTHER	0.49%	0.24%	0.26%	0.23%	0.02%	0.02%	0.00%	0.02%	0.02%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.35%
TOTAL	46.59%	19.77%	8.56%	8.24%	3.66%	2.58%	2.37%	2.32%	1.78%	1.77%	1.14%	0.29%	0.26%	0.19%	0.26%	100%

4. FRUITS – JANUARY TO FEBRUARY 2025

This section shows the estimated smallholder market access for the top 20 fruits across selected fresh produce markets based on revenue and volume sold. The data shows that 60 fruits are available in 15 fresh produce markets. However, only the top 20 fruits are presented and reviewed, with the rest categorised as ‘Other fruit’. The smallholder market access estimates of various fruits across different markets are illustrated in **Table 5**. We averaged the data in the period from January to February 2025. The average SMAE for fruits in terms of revenue (**R469 million**) is presented in percentages to explain distribution per market and commodity.

Bananas and apples dominate the fruit market, accounting for 23.48% and 15.55% of the SMAE. This is followed by grapes (9.07%), mangoes (8.54%), and watermelons (3.93%), which hold market shares as indicated. These top five fruit commodities collectively contribute to 60.57% of the SMAEs in market share. Meanwhile, fruits ranked sixth to twentieth, holding a 35.13% market share by revenue, while other fruits accounted for 4.30%.

Johannesburg emerges as the leading market with a 44.08% market share, followed by Tshwane (19.50%), Cape Town (12.42%), and Durban (10.09%). These four markets contribute 86.09% of the SMAE, while others account for 13.91%. The continued dominance of Johannesburg, Tshwane, Cape Town, and Durban in the smallholder market share can be attributed to the dominance of a few key market agents and the allocation of floor space, favouring larger players. Cross-shareholding, specialization by commodity, and economies of scale further entrench the market power of dominant agents, as indicated by the Fresh Produce Market Inquiry Report. Historical mergers and limited regulatory intervention exacerbate this concentration, creating challenges for smaller agents and new entrants to compete effectively.

The distribution of SMAEs in terms of volume is illustrated in **Table 6**. In this analysis, the SMAE for fruits in terms of volume (**39.15 thousand tons**) is presented in percentages to explain the distribution across markets and commodities. SMAEs show that bananas and watermelons, ranked first and second in terms of volume, contribute 29.93% and 14.48%, respectively. Apples follow at 13.10%, mangoes at 6.45%, and plums at 5.83%. Collectively, these fruits contribute 69.79% of the SMAEs in terms of volume. Meanwhile, fruits ranked sixth to twentieth, holding a 28.95% market share by volume, while other fruits accounted for 1.26%. The distribution across markets, considering the volume supplied, mirrors the pattern when analysed by revenue. Johannesburg leads with 40.38%, followed by Tshwane (20.28%), Cape Town (13.02%), and Durban (9.56%).

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	BFN	EL	KDP	PE	WLK	PMB	WBK	KIM	GRG	VER	
BANANAS	7.83%	4.59%	3.80%	2.06%	0.82%	0.73%	1.33%	0.48%	0.69%	0.34%	0.65%	0.13%	0.02%	0.00%	0.00%	23.48%
WATERMELONS	1.77%	0.84%	0.52%	0.24%	0.04%	0.21%	0.04%	0.09%	0.03%	0.11%	0.00%	0.00%	0.02%	0.00%	0.00%	3.93%
APPLES	7.38%	3.44%	0.99%	1.51%	0.50%	0.49%	0.38%	0.29%	0.00%	0.26%	0.27%	0.01%	0.03%	0.00%	0.00%	15.55%
MANGOES	3.68%	1.78%	1.23%	1.09%	0.16%	0.11%	0.16%	0.09%	0.04%	0.09%	0.08%	0.01%	0.03%	0.00%	0.00%	8.54%
PLUMS	2.26%	0.94%	0.23%	0.68%	0.15%	0.10%	0.10%	0.05%	0.01%	0.06%	0.13%	0.00%	0.00%	0.00%	0.00%	4.70%
GRAPES	4.78%	1.61%	0.73%	1.05%	0.15%	0.25%	0.12%	0.10%	0.01%	0.11%	0.13%	0.00%	0.01%	0.00%	0.00%	9.07%
PEARS	1.88%	0.88%	0.21%	0.42%	0.13%	0.14%	0.10%	0.07%	0.00%	0.07%	0.10%	0.00%	0.01%	0.00%	0.00%	4.00%
NECTARINES	2.69%	1.40%	0.50%	0.90%	0.27%	0.40%	0.30%	0.17%	0.00%	0.10%	0.30%	0.01%	0.00%	0.00%	0.00%	7.04%
PEACHES	1.80%	0.97%	0.31%	0.86%	0.11%	0.09%	0.21%	0.06%	0.01%	0.03%	0.22%	0.00%	0.00%	0.00%	0.00%	4.67%
PINEAPPLES	1.45%	0.52%	0.59%	0.34%	0.04%	0.06%	0.06%	0.02%	0.02%	0.02%	0.02%	0.00%	0.01%	0.00%	0.00%	3.16%
LEMONS	0.99%	0.27%	0.42%	0.21%	0.02%	0.02%	0.01%	0.01%	0.02%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.98%
AVOCADOS	2.31%	0.54%	0.80%	0.11%	0.04%	0.05%	0.04%	0.03%	0.04%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	3.99%
ORANGES	0.85%	0.19%	0.42%	0.06%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.53%
SWEET MELONS	0.35%	0.08%	0.33%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.78%
MUSKMELONS	0.45%	0.09%	0.07%	0.02%	0.00%	0.01%	0.00%	0.01%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.68%
PAPAYAS	0.43%	0.15%	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%	0.62%
STRAWBERRIES	0.46%	0.32%	0.42%	0.08%	0.00%	0.02%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.33%
APRICOTS	0.10%	0.05%	0.04%	0.02%	0.01%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.26%
LIMES	0.08%	0.02%	0.09%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.21%
GRAPEFRUIT	0.14%	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%	0.00%	0.19%
OTHER	2.38%	0.78%	0.71%	0.36%	0.01%	0.02%	0.00%	0.01%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	4.30%
TOTAL	44.08%	19.50%	12.42%	10.09%	2.47%	2.71%	2.87%	1.48%	0.92%	1.20%	1.95%	0.16%	0.13%	0.02%	0.01%	100%

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PMB	KDP	WLK	PE	WBK	KIM	VER	GRG	
BANANAS	9.84%	6.50%	4.13%	2.78%	1.17%	0.91%	1.61%	0.60%	0.77%	0.45%	0.94%	0.20%	0.03%	0.00%	0.00%	29.93%
WATERMELONS	5.62%	2.61%	3.09%	0.49%	0.15%	0.61%	0.08%	0.30%	0.93%	0.28%	0.00%	0.00%	0.05%	0.25%	0.00%	14.48%
APPLES	5.77%	2.90%	0.83%	1.54%	0.45%	0.39%	0.32%	0.30%	0.00%	0.24%	0.32%	0.01%	0.03%	0.00%	0.00%	13.10%
MANGOES	2.55%	1.77%	0.84%	0.74%	0.12%	0.08%	0.10%	0.07%	0.02%	0.07%	0.06%	0.01%	0.02%	0.00%	0.00%	6.45%
PLUMS	2.88%	1.06%	0.26%	0.85%	0.19%	0.11%	0.10%	0.05%	0.02%	0.09%	0.22%	0.00%	0.00%	0.00%	0.00%	5.83%
GRAPES	2.67%	0.89%	0.41%	0.55%	0.11%	0.18%	0.06%	0.06%	0.00%	0.09%	0.06%	0.00%	0.01%	0.00%	0.00%	5.09%
PEARS	2.19%	1.09%	0.25%	0.59%	0.17%	0.16%	0.11%	0.12%	0.00%	0.11%	0.17%	0.00%	0.01%	0.00%	0.00%	4.97%
NECTARINES	1.60%	0.83%	0.37%	0.55%	0.19%	0.25%	0.18%	0.10%	0.00%	0.07%	0.23%	0.01%	0.00%	0.00%	0.00%	4.38%
PEACHES	1.29%	0.69%	0.22%	0.65%	0.12%	0.07%	0.19%	0.06%	0.01%	0.04%	0.24%	0.00%	0.00%	0.00%	0.00%	3.59%
PINEAPPLES	1.28%	0.43%	0.44%	0.31%	0.03%	0.05%	0.11%	0.02%	0.03%	0.01%	0.02%	0.00%	0.01%	0.00%	0.00%	2.74%
LEMONS	1.17%	0.41%	0.65%	0.27%	0.04%	0.02%	0.01%	0.01%	0.04%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	2.65%
AVOCADOS	1.19%	0.31%	0.34%	0.03%	0.05%	0.03%	0.02%	0.03%	0.02%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	2.05%
ORANGES	0.41%	0.11%	0.31%	0.03%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.87%
SWEET MELONS	0.31%	0.06%	0.45%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.84%
MUSKMELONS	0.43%	0.06%	0.06%	0.03%	0.00%	0.01%	0.01%	0.01%	0.04%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.66%
PAPAYAS	0.21%	0.05%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.29%
STRAWBERRIES	0.08%	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%	0.25%
APRICOTS	0.10%	0.04%	0.04%	0.02%	0.01%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.23%
LIMES	0.06%	0.02%	0.06%	0.01%	0.00%	0.00%	0.00%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.18%
GRAPEFRUIT	0.10%	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%	0.00%	0.16%
OTHER	0.65%	0.31%	0.21%	0.07%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	1.26%
TOTAL	40.38%	20.28%	13.02%	9.56%	2.83%	2.88%	2.91%	1.74%	1.93%	1.48%	2.32%	0.23%	0.16%	0.26%	0.01%	100 %

5. AVERAGE PRICES OF SELECTED FRUITS AND VEGETABLES

Figure 3 illustrates South Africa's fresh produce pricing in early 2025, showing an overall deflation of 5.8% but notable commodity-level variations. Potato prices decreased by 19.5%, followed by tomatoes and onions, which declined by 12.5%, likely due to improved supply or weaker demand. In contrast, cabbage prices increased by 8.4%, possibly reflecting supply constraints or shifting consumer preferences. Peppers and butternut remained stable, suggesting market equilibrium. Root vegetables showed divergence, with carrot prices increasing by 4.7% while potato prices dropped nearly 20%. Squash prices also varied, with Hubbard decreasing by 13.4%, while butternut remained steady. These patterns collectively indicate that current price movements are driven primarily by commodity-specific supply dynamics, with factors such as harvest timing, storage capacity, and regional distribution efficiencies playing determining roles rather than broader macroeconomic forces affecting the sector uniformly.

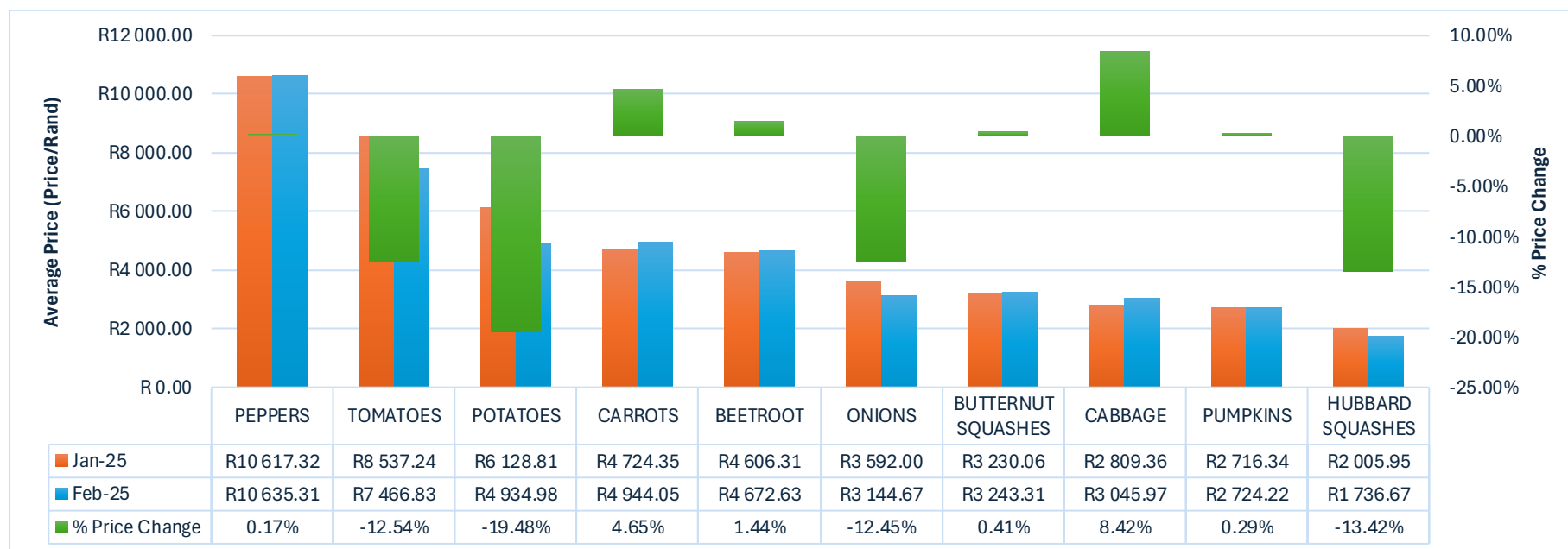


Figure 3: Average Prices (Rand/Ton) for the Top 10 Vegetables

Figure 4 shows that the fruit market exhibited price volatility between January and February 2025, with premium categories showing the most drastic movements. Nectarines increased drastically by 39% (R16,695 to R23,199/ton), while avocados decreased sharply by 39% (R21,706 to R13,242/ton), demonstrating opposing supply shocks. Pineapples rose significantly by 26%, contrasting with substantial decreases in plums (down 18%), apples (down 14%), and watermelons (down 16%). Mangoes showed relative stability with a modest 2.6% increase, while pears decreased slightly by 1.7%. This volatility highlights the market's segmentation, where premium fruits experience wider price fluctuations compared to more stable staple varieties. The data underscores how perishability and supply chain dynamics create distinct pricing patterns across fruit categories, with important implications for production planning and market regulation.

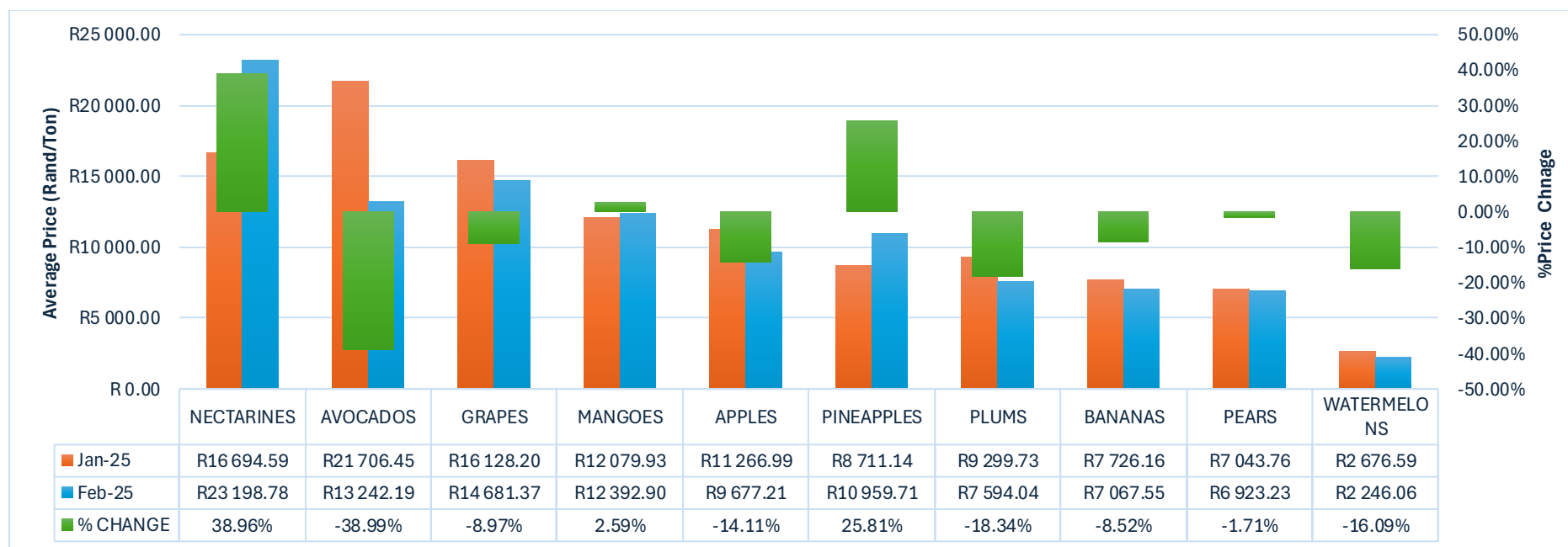


Figure 4: Average Prices (Rand/Ton) for Top 10 fruits

6. CONCLUSION

The smallholder market access estimates (SMAEs) for fruits and vegetables from January to February 2025 reveal continued volatility in both revenue and volume. The total revenue from smallholder farmers decreased by 7.3% month-on-month from R610.6 million in January to R565.8 million in February, reflecting ongoing market pressures. The fresh produce market remains highly concentrated, with the four largest markets—Johannesburg, Tshwane, Cape Town, and Durban—maintaining their collective 84% revenue share despite moderate 6-10% declines. These markets continue to dominate as primary destinations for smallholder farmers, reinforcing structural concentration patterns.

In vegetable supply, potatoes (42.27% share), tomatoes (15.24%), and onions (10.70%) still lead the market, collectively representing 68.21% of SMAE revenue. This persistent concentration on a few staple crops underscores farmers' challenges in producing alternative vegetables. Market share remains heavily skewed toward the four major markets, which account for 83.06% of smallholder vegetable revenue. Similarly, bananas (23.48%) and apples (15.55%) dominate the fruit supply, with the top five fruits comprising 60.57% of the market share. The four largest markets maintain 86.09% of fruit SMAE, perpetuating the same concentration patterns observed in previous quarters.

Price movements in early 2025 reveal three distinct trends. First, extreme volatility in high-value crops saw nectarines increase by 39% and avocados decline by 39%, likely due to fluctuations in production levels and shifting consumer demand. Second, staple crops faced downward pressure, with potatoes dropping by 19.5% and tomatoes by 12.5%, suggesting oversupply, while carrots rose by 4.7%, indicating a possible regional shortage. Third, market-specific factors drove cabbage prices up by 8.4%, likely due to reduced supply, while pineapples increased by 25.8% and plums declined by 18.3%, reflecting imbalances in production and market availability. These trends emphasize the role of supply conditions and shifting market demand in determining fresh produce prices.

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