



**NAMMC**

Promoting market access for South African agriculture

**SMALLHOLDER MARKET  
ACCESS ESTIMATES  
(SMAE)**

**QUARTER 2 2025/2026**

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# ABBREVIATIONS

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BFN	Bloemfontein
CPT	Cape Town
DoA	Department of Agriculture
DBN	Durban
EL	East London
GRG	George
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
SMAE	Smallholder Market Access Estimates
TSH	Tshwane
Q	Quarter

# 1. BACKGROUND

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This report estimates smallholder market access at National Fresh Produce Markets (NFPMs) in South Africa for the period from Q1 2024 to Q3 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 5 performing fruits and vegetables sold across these markets. This concentration is due to the top 5 items accounting for approximately 80% of the total volume traded and 80% of the revenue generated in NFPMs. This analysis offers valuable insights into the participation of smallholder farmers in South Africa's formal fresh produce markets, underscoring the need for targeted interventions to improve their market access and overall contribution to the agricultural sector.

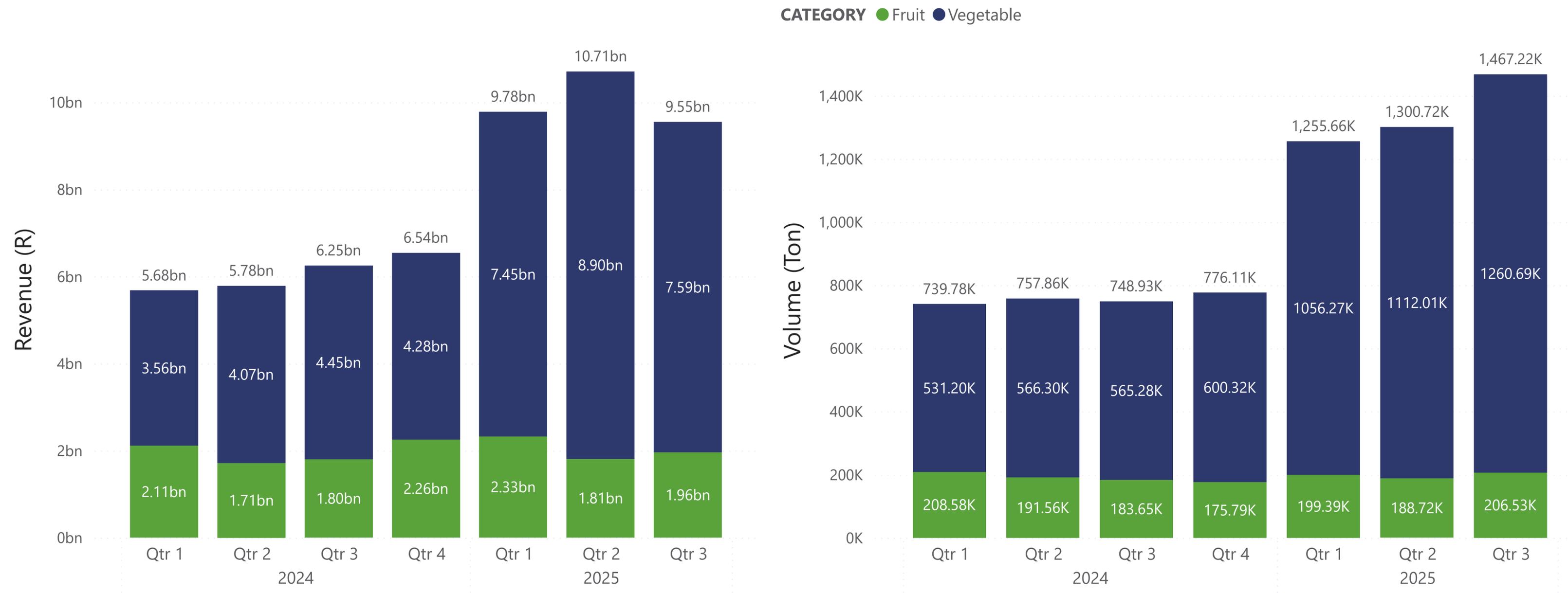
## 2. OVERVIEW

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This report analyses smallholder market access using fresh produce data from Q1 2024 to Q3 2025 across 15 selected Fresh Produce Markets, focusing on revenue, volume, and pricing trends. The market demonstrated strong growth, with total revenue reaching R9.55 billion in Q3 2025, a 53 % increase from Q3 2024. While total volumes increased by 31 % to 1.47 million tons, suggesting improved production, logistics, and smallholder participation. Vegetables consistently outperformed fruits, accounting for high proportion of revenue and volume, with potatoes, tomatoes, and onions leading vegetable sales, while bananas dominated fruits. This dominance indicates a strong domestic orientation for vegetables versus the export-driven nature of many fruits. Large markets handled over 80 % of trade, underlining market concentration and its implications for smallholder access. Vegetable supply in these markets grew by 123 % to 378.2 thousand tons in Q3 2025, suggesting increased participation but exposing smallholders to price volatility in certain commodities such as peppers and avocados.

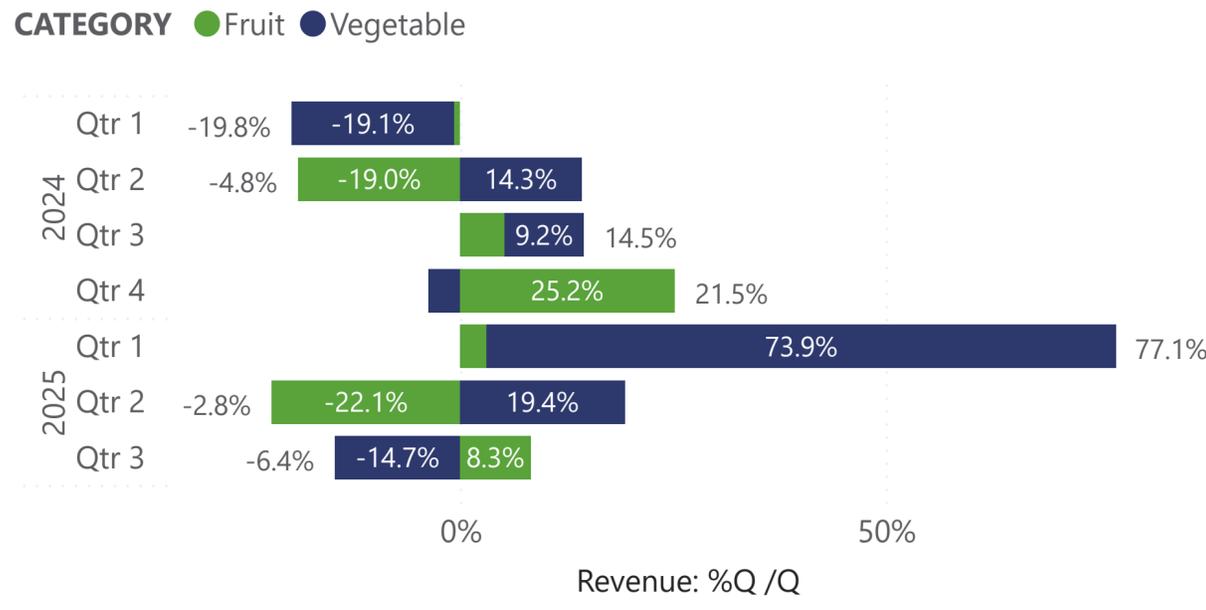
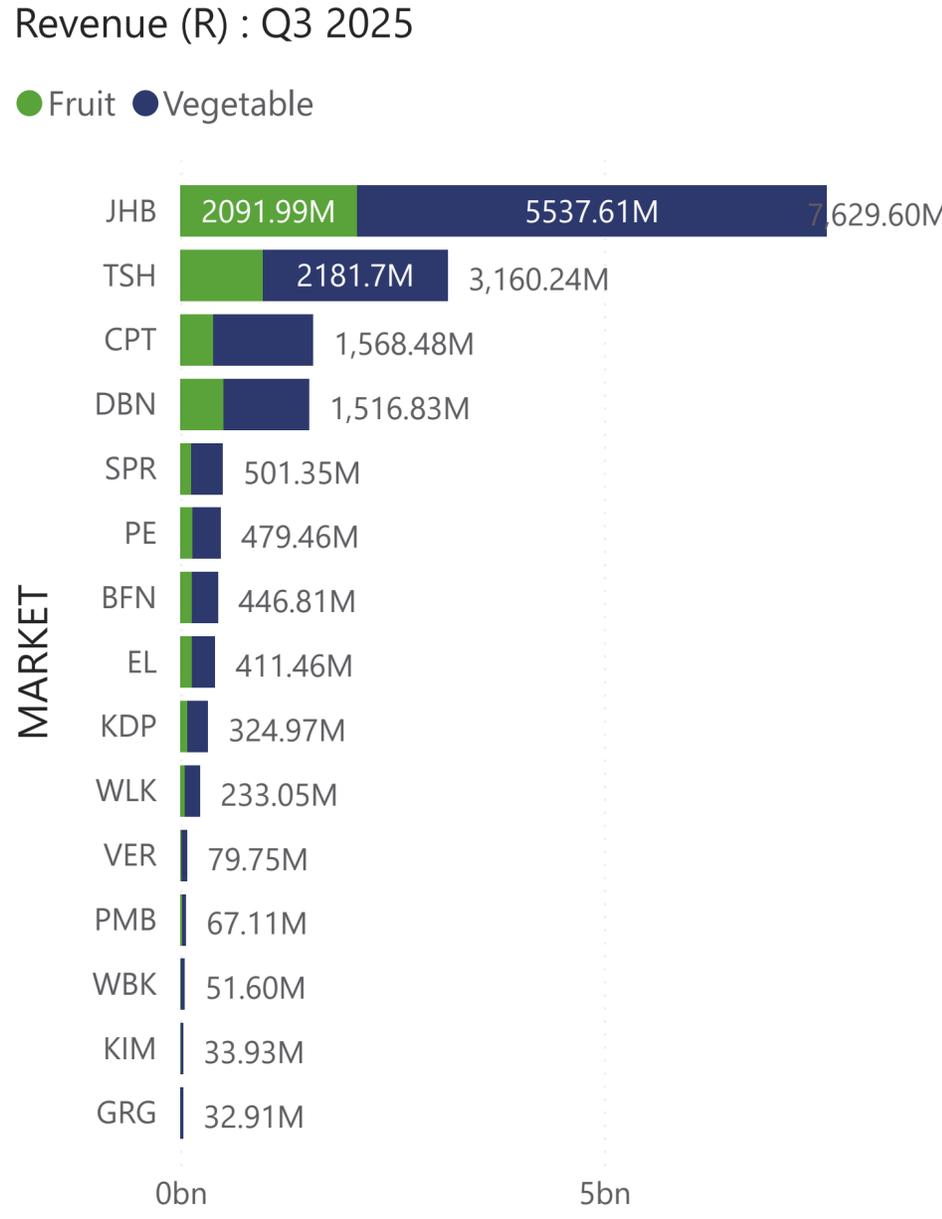
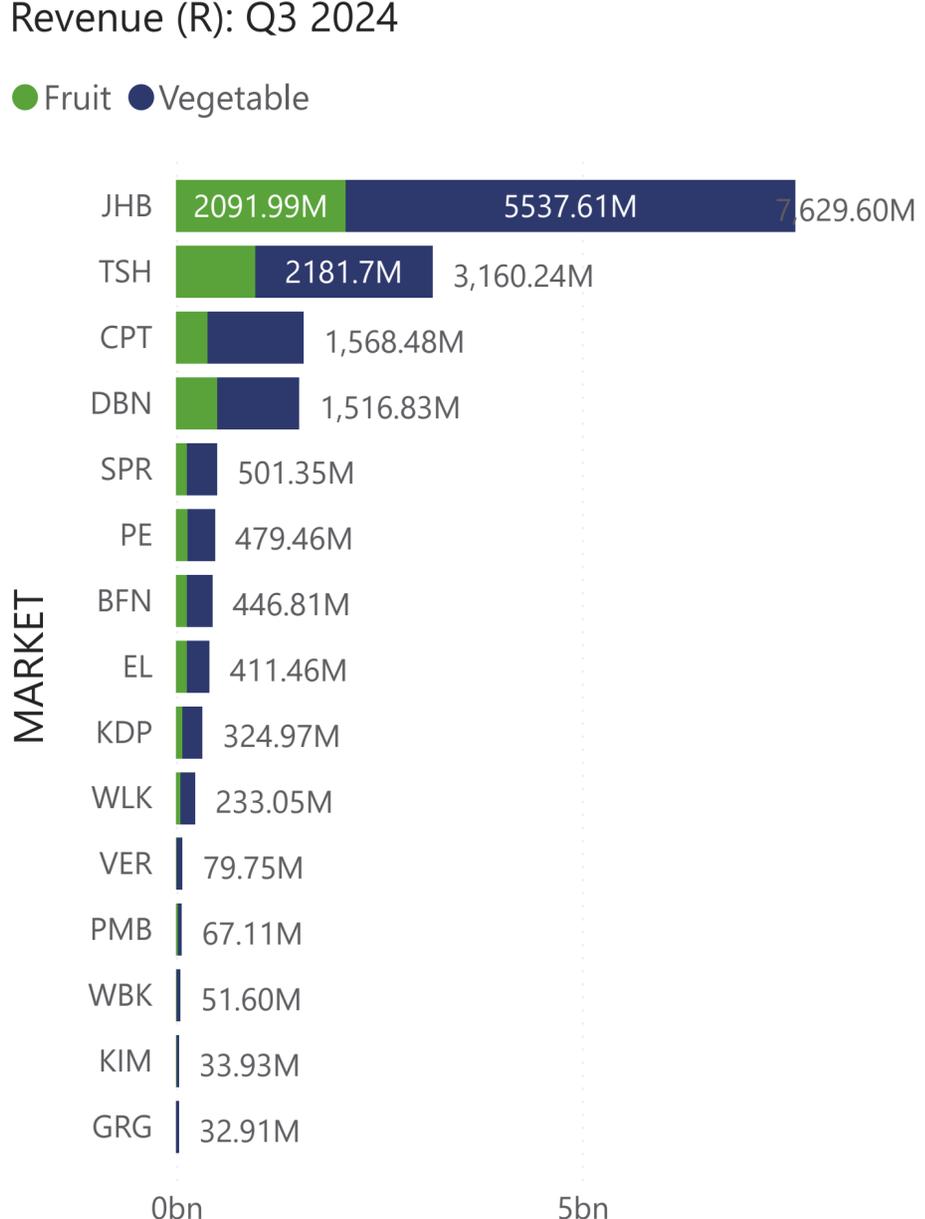
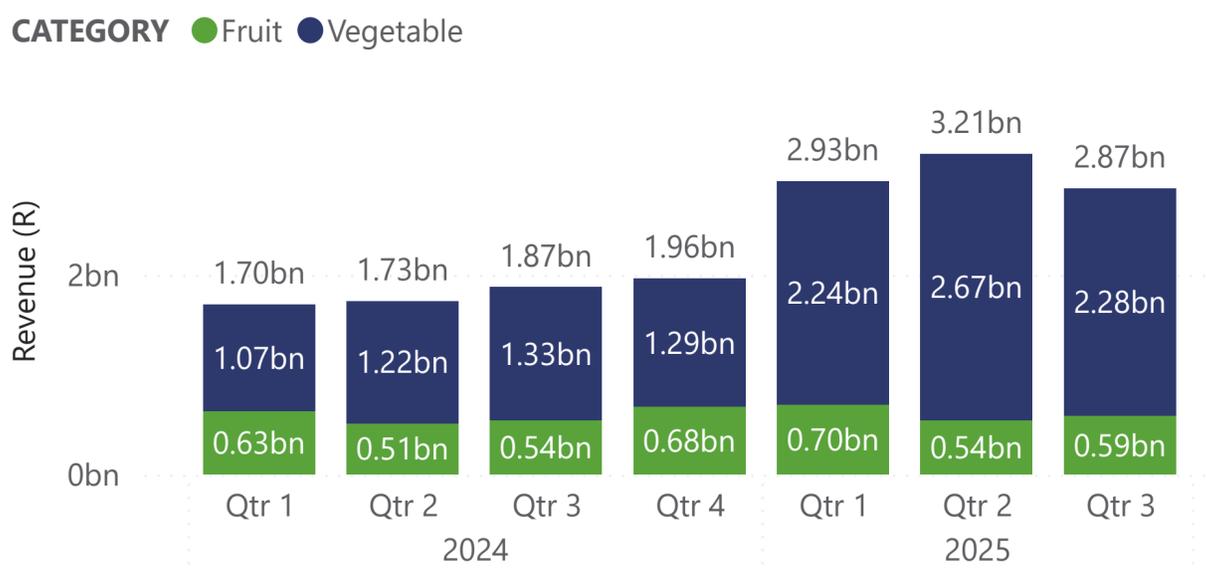
### 3. TOTAL REVENUE AND VOLUME

A total of 1 261 thousand tons of vegetables and 207 thousand tons of fruits were supplied, generating approximately R7.59 billion and R1.96 billion, respectively. Vegetables accounted for around 80% of total market turnover. This is largely because fruits are more export-oriented. Comparing Q3 2025 with Q3 2024, total revenue increased from R6.25 billion to R9.55 billion, which is a growth of about 53%. Total volume also increased from 776.1 thousand tons to 1 467.2 thousand tons, which is an increase of roughly 89%, showing strong growth in both revenue and supply. The increase in revenue and volume likely reflects a combination of higher production, better market participation, and favourable prices.



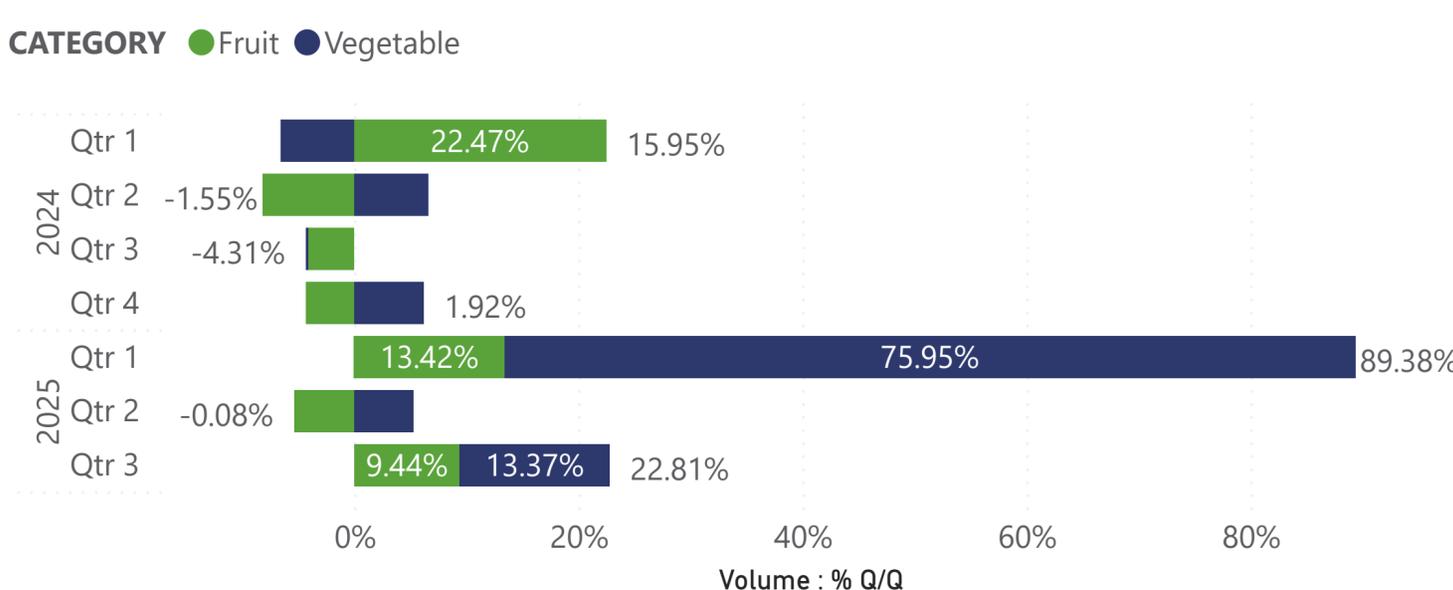
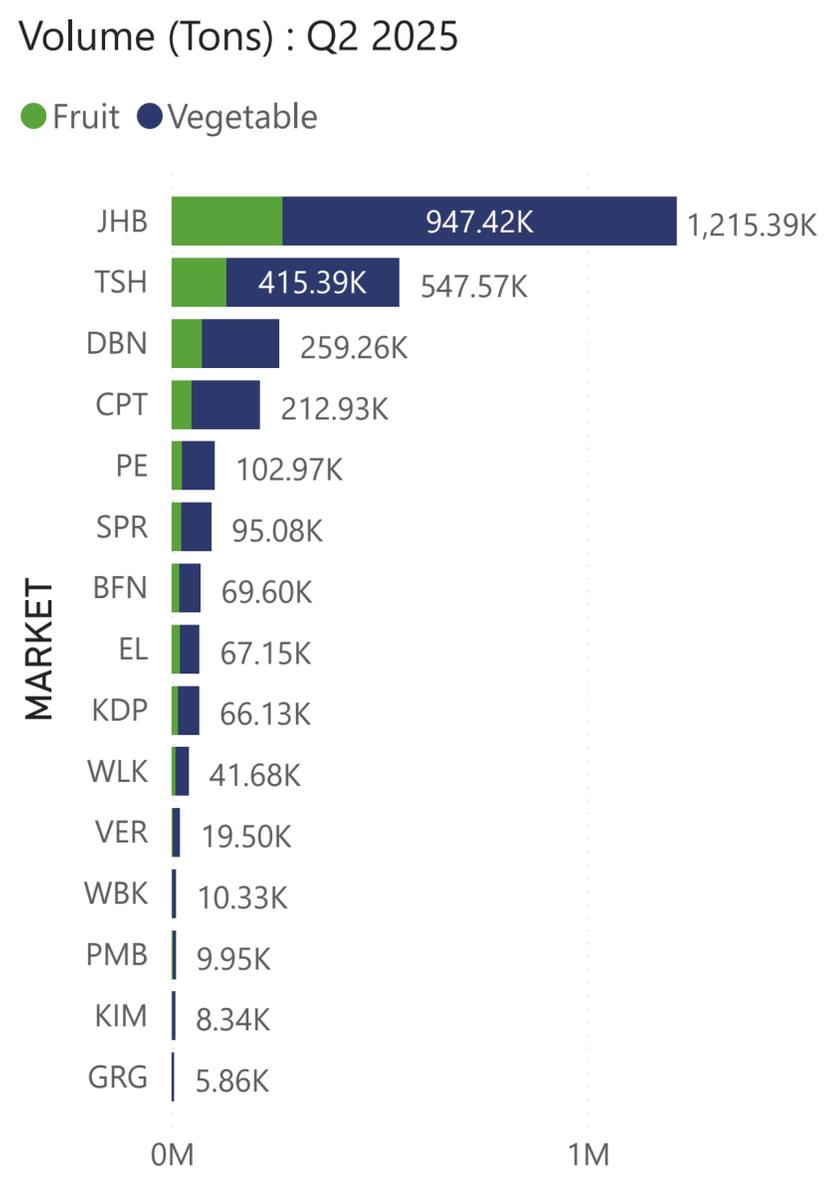
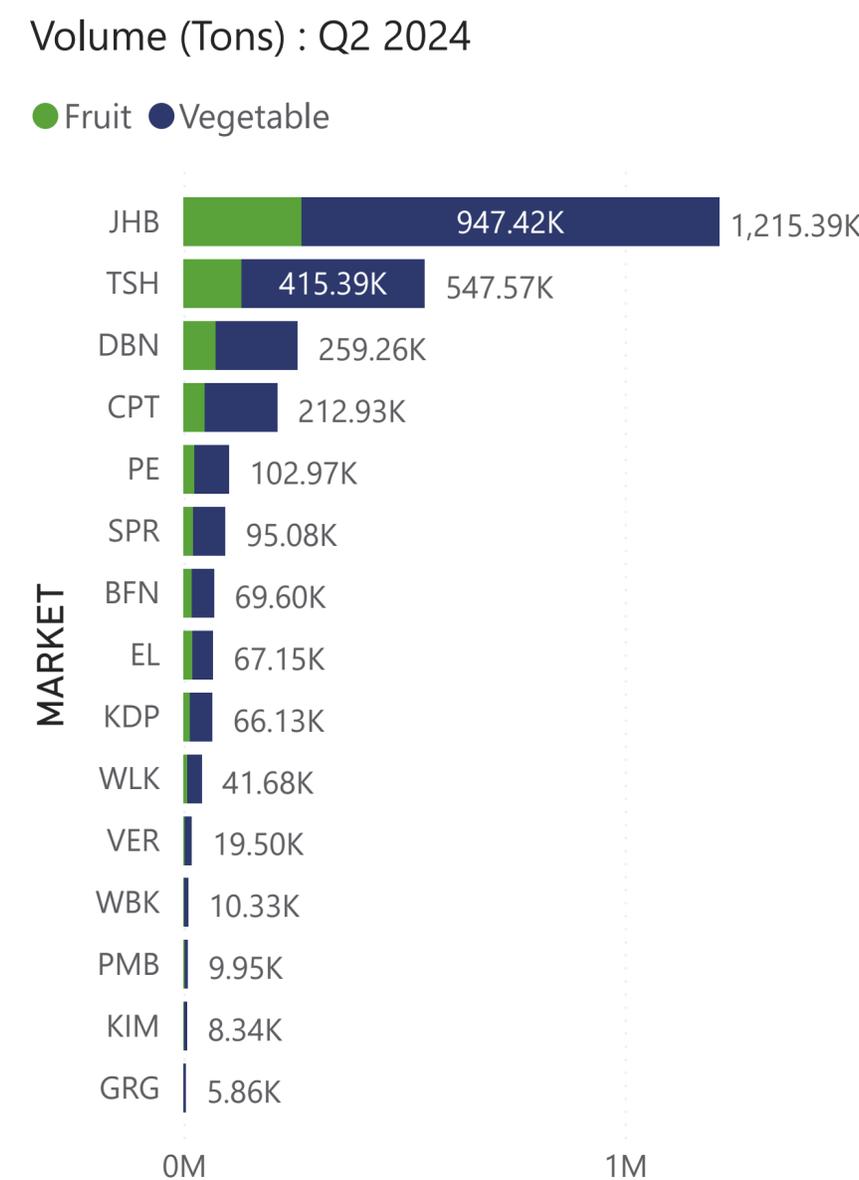
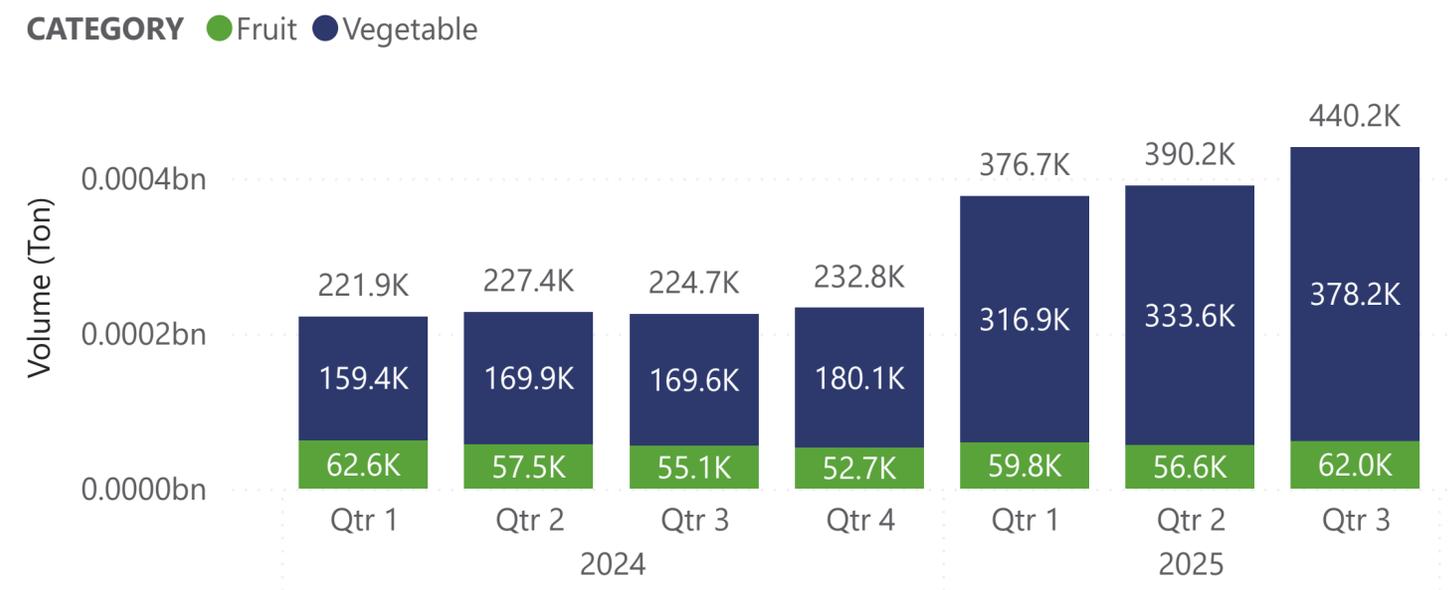
# 4. ESTIMATED REVENUE FROM SMALLHOLDER FARMERS

Vegetables consistently generated higher revenue than fruits for smallholder farmers across 2024 and 2025. In 2024, vegetable revenue ranged from around R1.07 billion to R1.33 billion. At the same time, fruit revenue was much lower ranging between R513 million and R676 million, suggesting that fruits are export-oriented in nature. Revenue for vegetables increased sharply in 2025, reaching R2.24 billion and R2.67 billion in the first two quarters, likely driven by improved production, better market access, and higher prices. Fruit revenue increased moderately, with R0.7 billion in Q1 2025 and R0.59 billion in Q3, suggesting limited domestic demand.



# 5. ESTIMATED VOLUME FROM SMALLHOLDER FARMERS

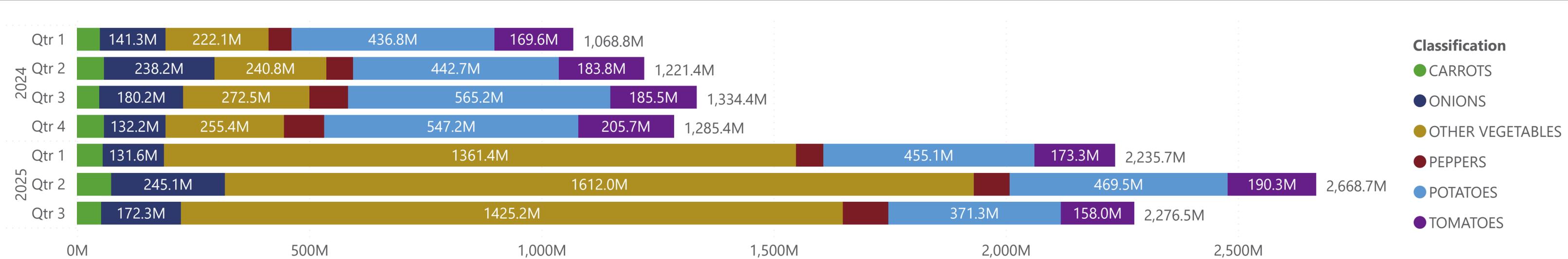
Vegetables consistently accounted for higher volumes than fruits supplied by smallholder farmers across 2024 and 2025. In Q3 2024, estimated vegetable volume reached 169.6 thousand tons, while fruit volume was much lower at 55.1 thousand tons, suggesting that fruits are export-oriented in nature. Vegetable supply increased sharply in Q3 2025, reaching 378.2 thousand tons, likely driven by improved production, better market access, and favourable seasonal conditions. Johannesburg (JHB), Tshwane (TSH), Cape Town (CPT) and Durban (DBN) markets stand out as the predominant markets in terms of volume, accounting for more than 80% of the traded commodities.



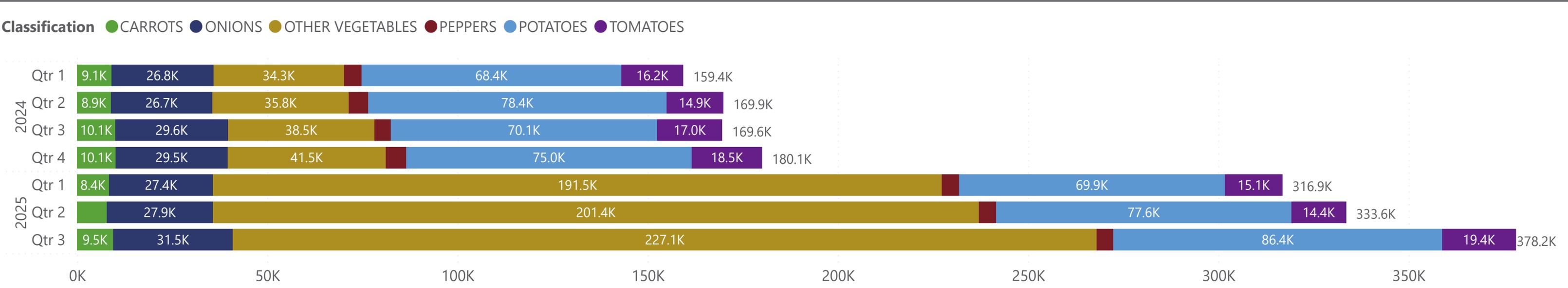
# 6. ESTIMATED VOLUME AND REVENUE OF VEGETABLES FROM SMALLHOLDER FARMERS

The data from Q1 to Q3 2025 shows that revenue for most vegetables peaked in Q2. Carrots, onions, potatoes, and tomatoes experienced declines after Q2 as higher volumes put downward pressure on prices. In contrast, peppers and other vegetables continued to see revenue growth into Q3, supported by stable volumes that helped maintain prices. Compared with Q3 2024, revenue for carrots, peppers, and other vegetables increased, while onions, potatoes, and tomatoes declined due to oversupply.

Top 5 Vegetables: Revenue (Rands)



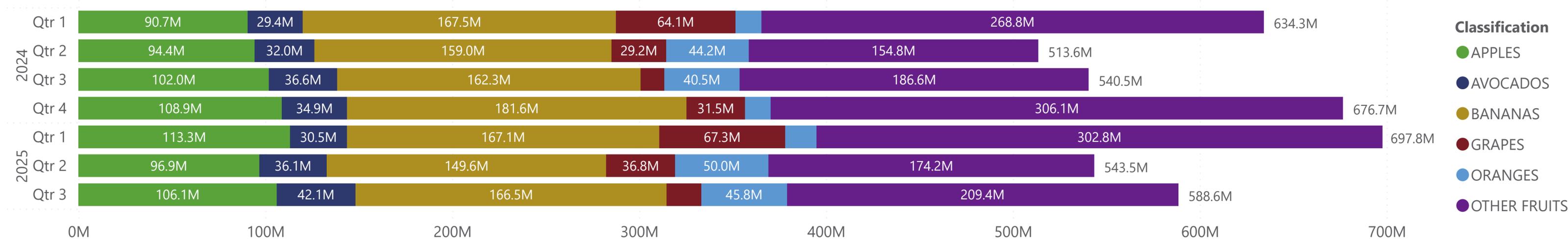
Top 5 Vegetables: Volume (Tons)



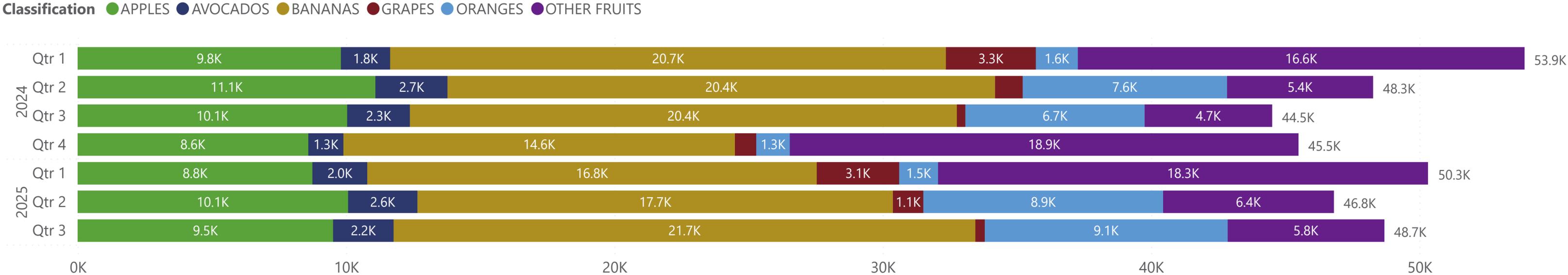
# 7. ESTIMATED VOLUME AND REVENUE OF FRUITS FROM SMALLHOLDER FARMERS

Revenue for apples, avocados, bananas, oranges, and other fruits increased in Q3 2025 compared with Q3 2024, while grape revenue declined. Volumes increased for bananas, oranges, and other fruits, slightly reducing prices but still supporting revenue growth. While very low grape volumes led to lower revenue. Across Q1 to Q3 2025, most fruit revenues peaked in Q1 and Q3, with fluctuations in apples, avocados, and grapes largely driven by changing volumes that affected prices.

Top 5 Fruits: Revenue (Rands)



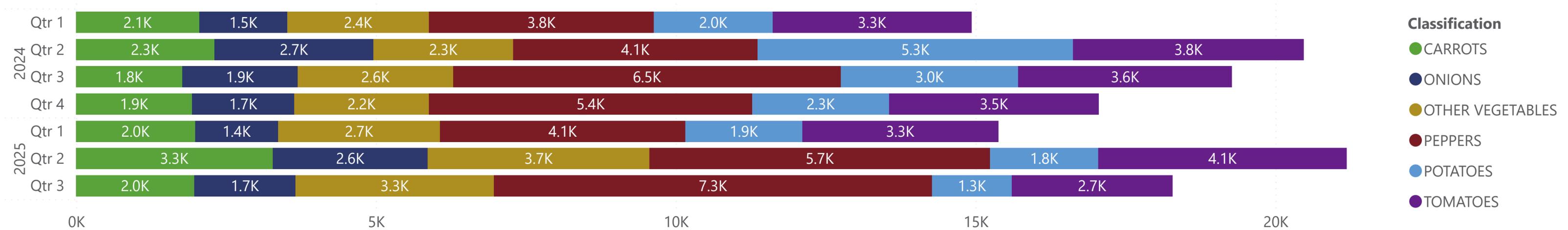
Top 5 Fruits: Volume (Tons)



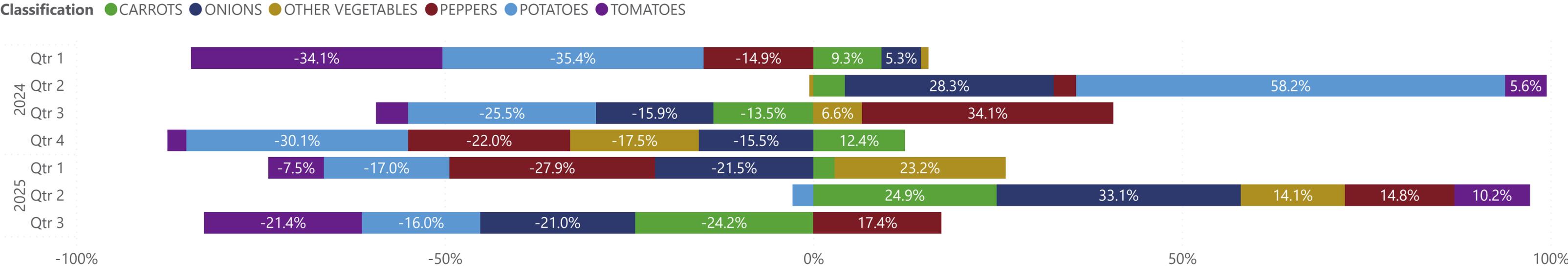
# 8. VEGETABLE PRICES

Prices for most vegetables decreased in Q3 2025 compared with Q3 2024, except for peppers. Carrot prices decreased by 39.9% to R1,973 per ton, onions decreased by 34.6% to R1,691 per ton, potatoes decreased by 26.5% to R1,328 per ton, tomatoes decreased by 35.3% to R2,679 per ton, and other vegetables decreased by 28.7% to R3,306 per ton. In contrast, pepper prices increased by 28.7% to R7,308 per ton. The overall decrease reflects higher market supply, which lowered prices, while the increase in pepper prices suggests limited availability and steady demand. From Q1 to Q3 2025, carrot and onion prices increased sharply to Q2 before decreasing in Q3. Potatoes and tomatoes prices decreased steadily after Q1, and peppers increased consistently throughout the period due to continue limited supply and increased demand.

Top 5 Vegetables: Average Prices (R/T)



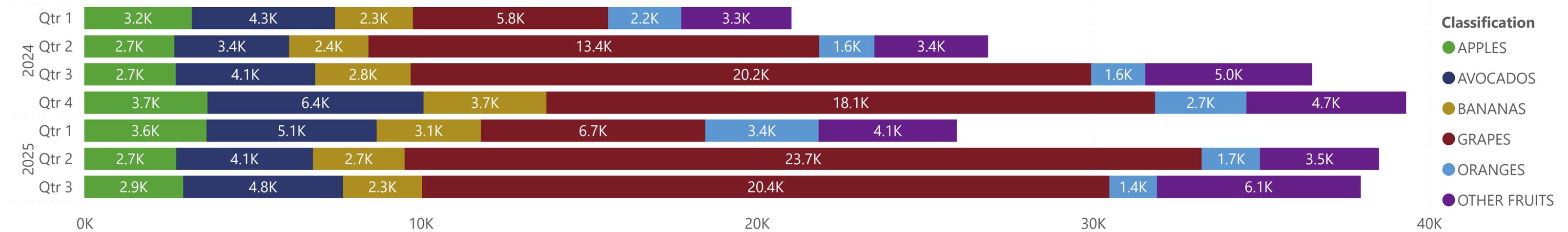
Quarter to Quarter % Price Change



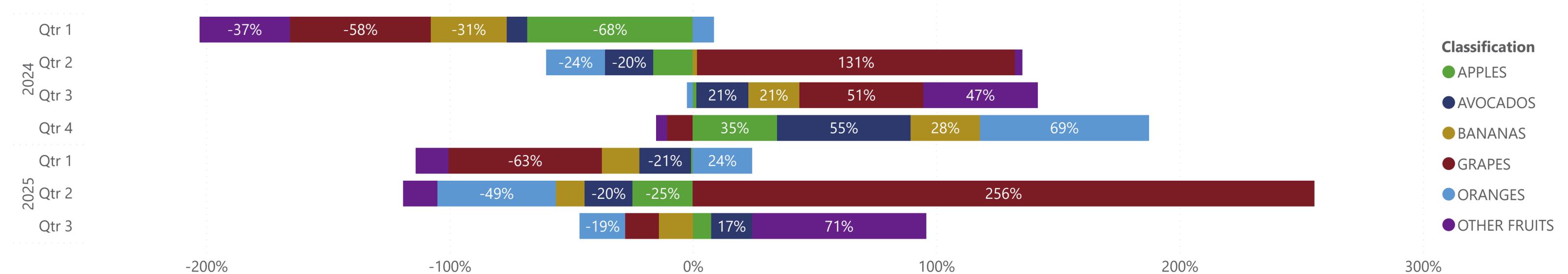
# 9. FRUIT PRICES

In Q3 2025, prices decreased for apples by 13.0% to R2,943 per ton, bananas by 13.0% to R2,349 per ton, grapes by 13.8% to R20,449 per ton, and oranges by 18.7% to R1,411 per ton. Higher volumes of some fruits, particularly bananas and grapes, put downward pressure on prices, while lower supply of avocados and other fruits supported price increases. These movements reflect the influence of seasonal supply and market demand on fruit prices.

Quarter to Quarter Price Change



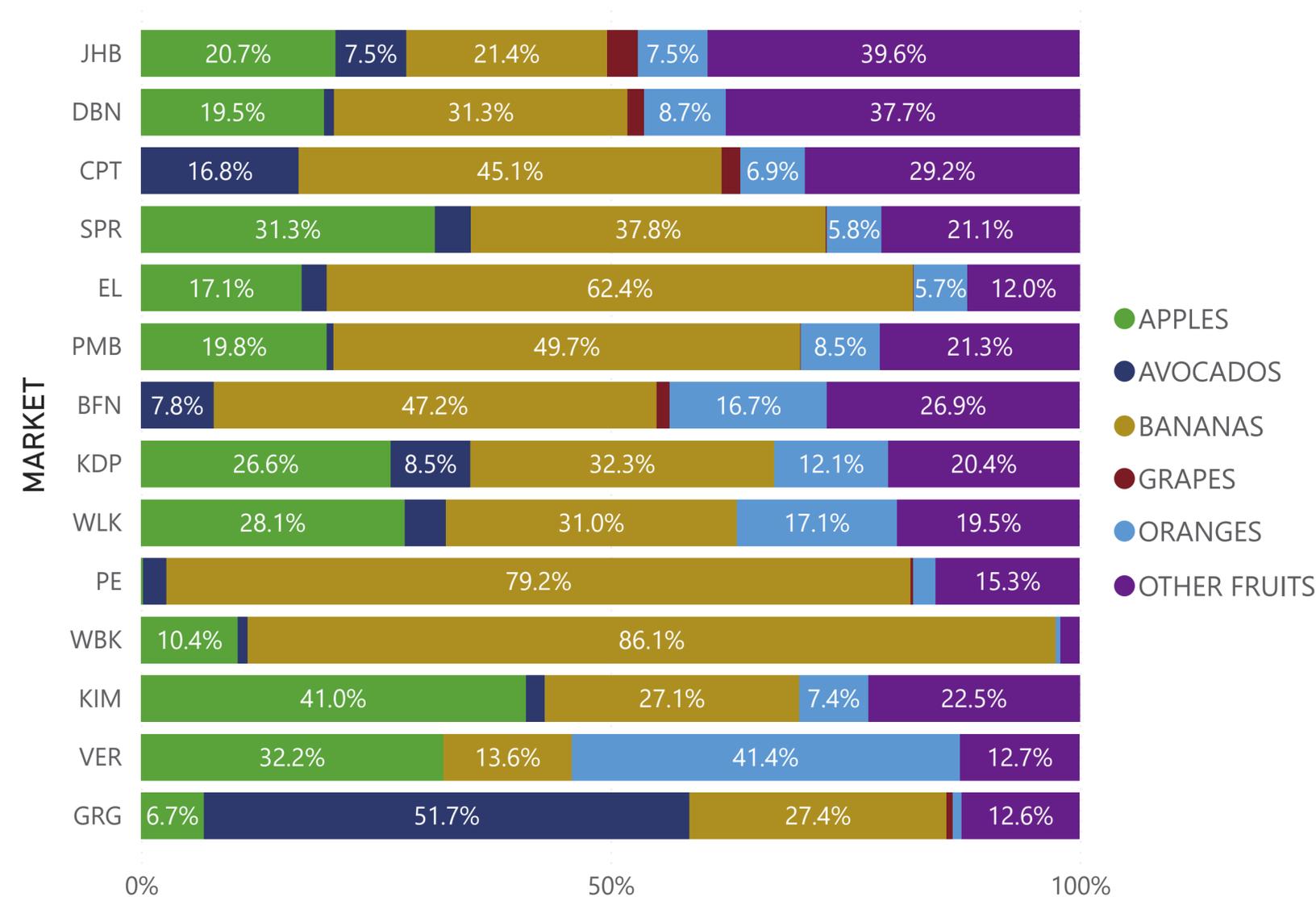
Quarter to Quarter % Price Change



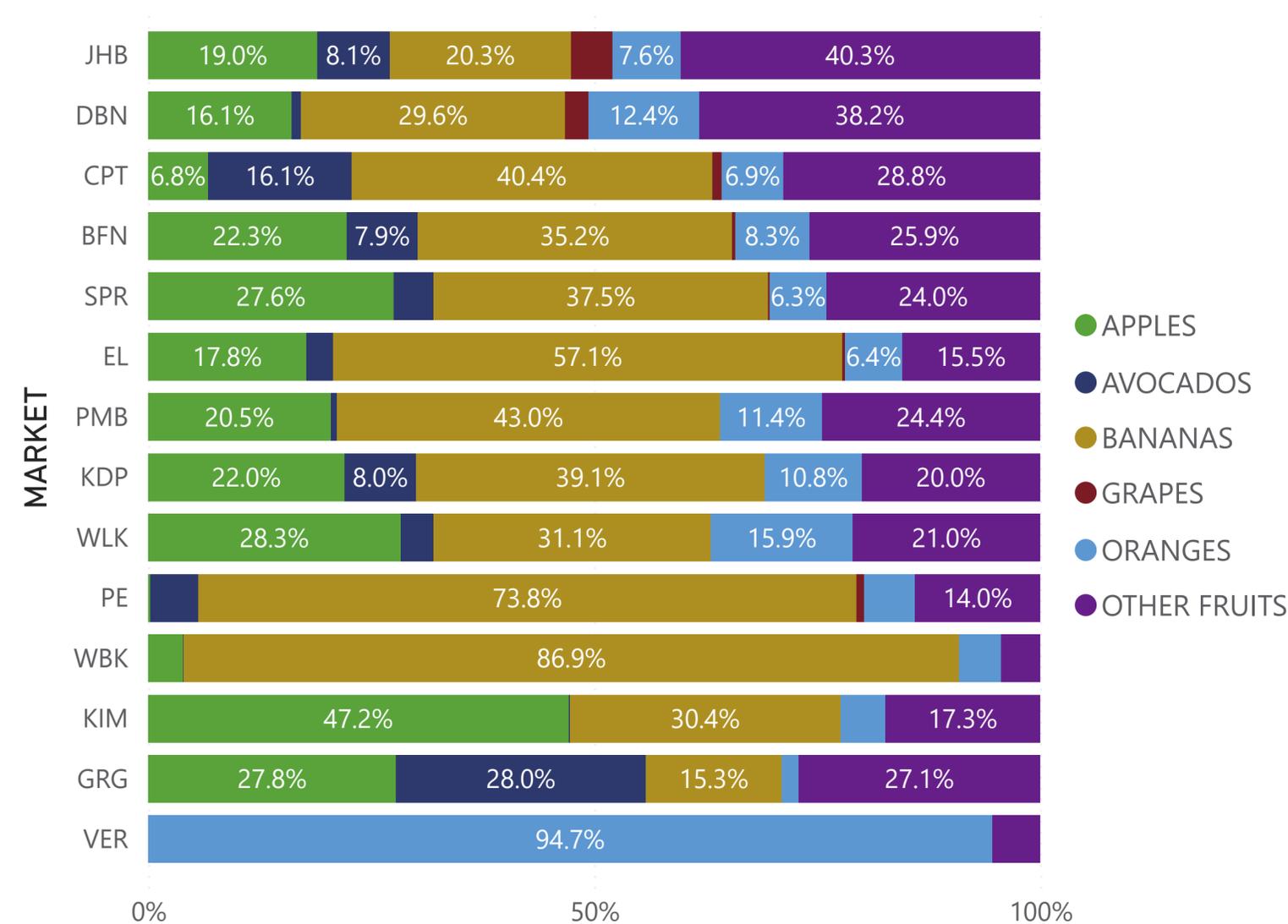
# 10. FRUIT MARKET SHARES

Comparing Q3 2024 and Q3 2025, other fruits and avocados gained market share in big markets such as JHB, TSH, CPT and DBN. While bananas market share decreased in most markets. Grapes also increased market share in JHB and DBN. In contrast, apples lost market share in JHB, DBN, and smaller markets, and oranges showed mixed trends with declines in some regions. Farmers of other fruits, avocados, and bananas potentially earned good revenue owing to higher prices in major markets. Apple farmers may face lower prices and tougher competition. Buyers may pay more for in-demand fruits such as avocados and bananas. At the same time, apples and some oranges could be cheaper and easier to source.

Fruit Shares in Q3: 2024



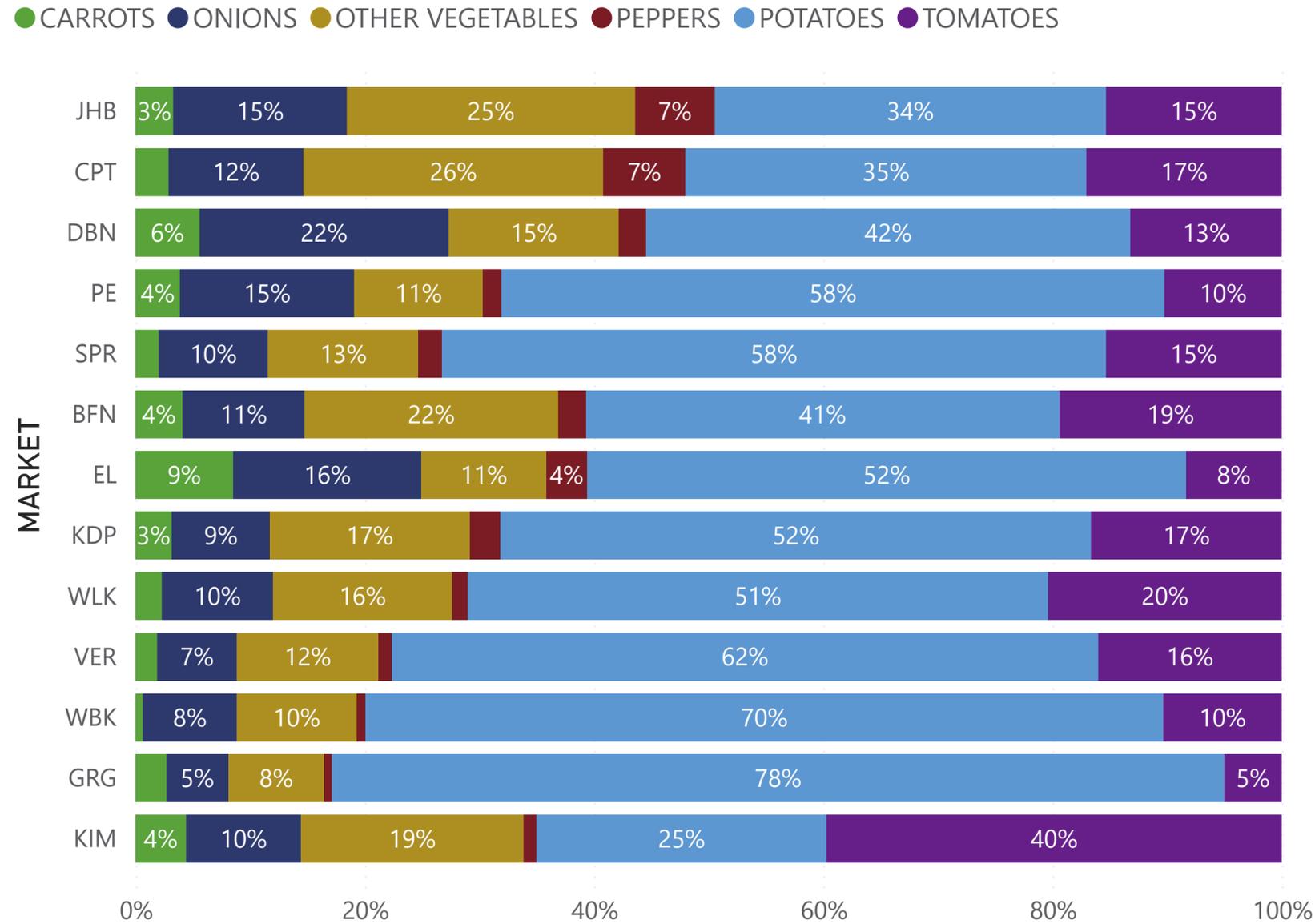
Fruit Shares in Q3 : 2025



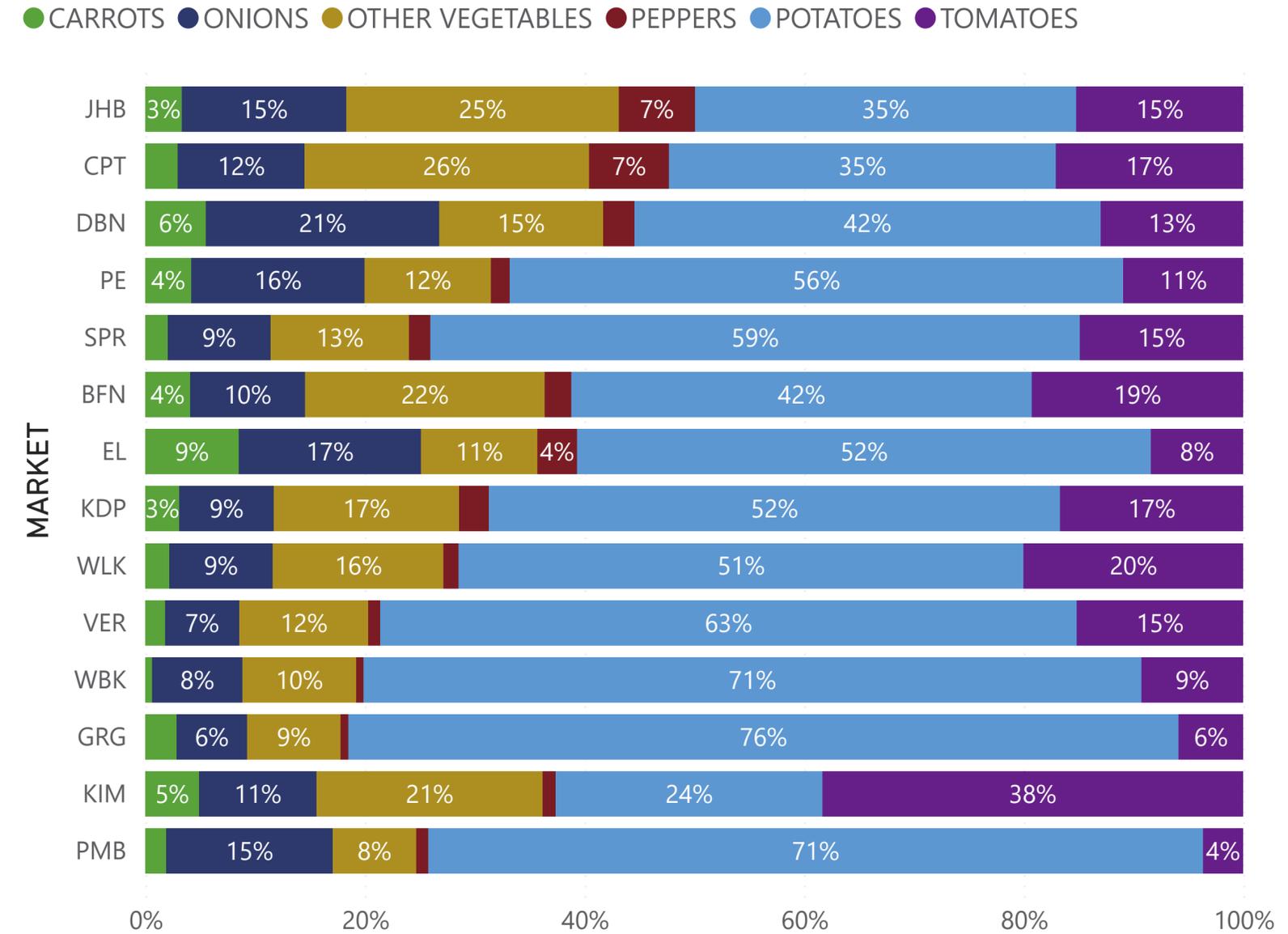
# 11. VEGETABLE MARKET SHARES

Comparing Q3 2025 to Q3 2024, potatoes remain the most traded vegetables in the fresh produce market. Other vegetables recorded high market share in JHB, DBN, CPT, and smaller markets. Tomatoes gained mainly in JHB, CPT, and smaller markets, while onions expanded in JHB, DBN, CPT, and smaller markets. Peppers gained market share in JHB, CPT, and other smaller markets. Carrots recorded market share growth in JHB, CPT, and EL.

Vegetable Market Shares in Q3: 2024



Vegetable Market Shares in Q3: 2025



# 12. CONCLUSION

The Q2 2025 Smallholder Market Access Estimates report reveals a dynamic fresh produce market in South Africa where vegetables consistently outperform fruits in both revenue and volume, demonstrating a steady and robust local market demand and the growing drive for fruits export. Total market revenue reached R9.55 billion in Q3 2025, representing a 53% year-on-year increase, while total volume grew to 1.47 million tons, marking a 31% increase. Within this expanding market landscape, the estimated contribution of smallholder farmers shows particularly strong performance, with their vegetable volumes increasing by 123% to 378.2 thousand tons and estimated revenue growing by 71% to R2.28 billion in Q3 2025 compared to the same period last year. Potatoes and bananas dominated their respective categories, while peppers and avocados showed significant price hikes. Major markets handled over 80% of fruits and vegetables volume in the fresh produce markets, with JHB, TSH, CPT, and DBN leading. Despite impressive growth, smallholders remain vulnerable to price fluctuations. Targeted support in market intelligence and capacity through training, extension services, access to funding, and business acumen in the form of collective action and partnerships with buyers remains crucial to sustain their market participation and enhance profitability in South African agricultural sector.

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