



SMALLHOLDER MARKET ACCESS ESTIMATES

**QUARTER 1
2025/2026**

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ABBREVIATIONS

- BFN: Bloemfontein
CT: Cape Town
NDA: National 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
VER: Vereeniging
WBK: Witbank
WLK: Welkom

1. BACKGROUND

This report estimates smallholder market access at National Fresh Produce Markets (NFPMs) in South Africa. 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.

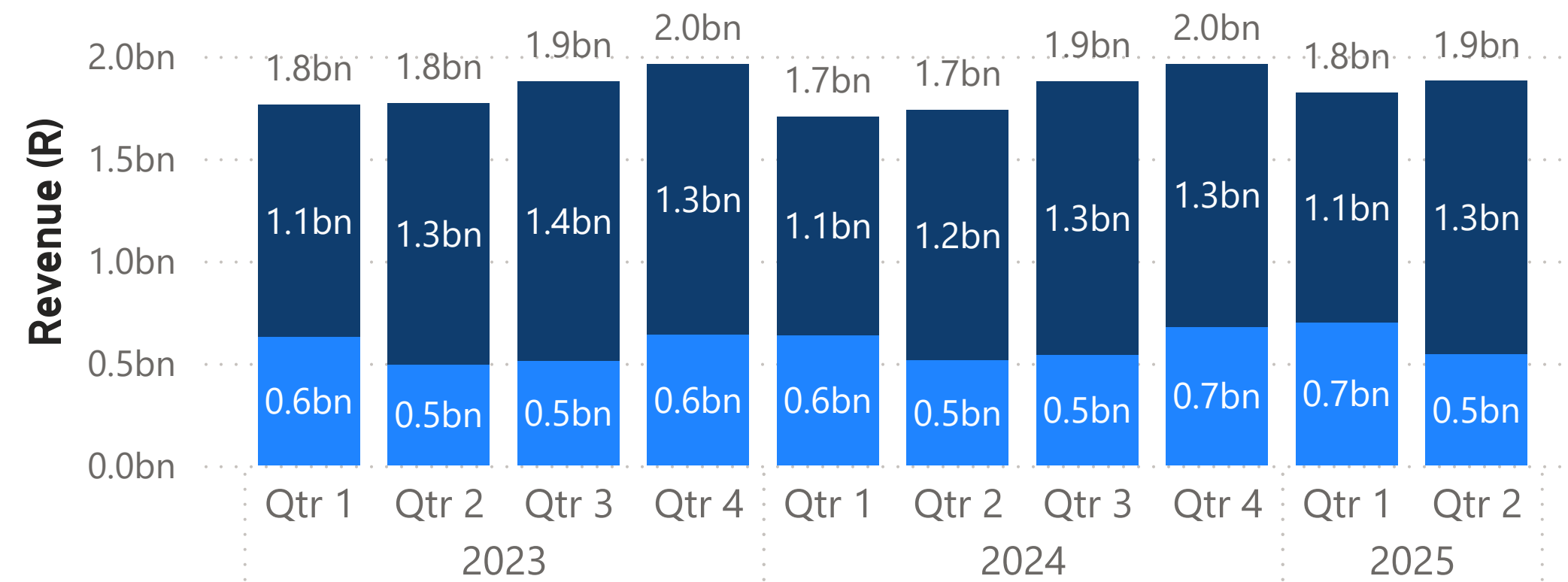
2. OVERVIEW

This report analyzes estimates of smallholder market access from the fresh produce data from Q2 2024 to Q2 2025 across 15 selected fresh produce markets, focusing on revenue, volume, and pricing trends. Vegetables consistently outperformed fruits, generating R1.34 billion (71.04% of total revenue) and accounting for 166.7 thousand tons (74.8%) of the 222.9 thousand tons traded in Q2 2025. Vegetable revenue grew steadily, while fruit volumes fluctuated. Commodity-level analysis shows potatoes as the top vegetable by volume (178,000 tons), with potatoes, tomatoes, and onions comprising nearly 60% of total vegetable volume. Bananas dominated the fruit category (162.3 million tons). Pricing for peppers and avocados exhibited notable volatility, peaking at R5,700/ton and R13,400/ton, respectively, indicating a higher risk-reward compared to more stable vegetable prices. South Africa's fresh produce market is highly concentrated, with Johannesburg, Tshwane, Cape Town, and Durban collectively accounting for over 80% of the total volume and revenue. Johannesburg is a primary market, with nearly 50% of supply comprising vegetables (led by potatoes and tomatoes) and 35% of deliveries comprising fruits, dominated by bananas and apples. Mid-sized and smaller markets exhibit strong commodity specialization; for instance, Port Elizabeth receives over half of its produce as bananas, and Kimberley absorbs 76% of its vegetables as potatoes. This market structure provides opportunities for farmers to align their production with regional demand and optimize their supply chains.

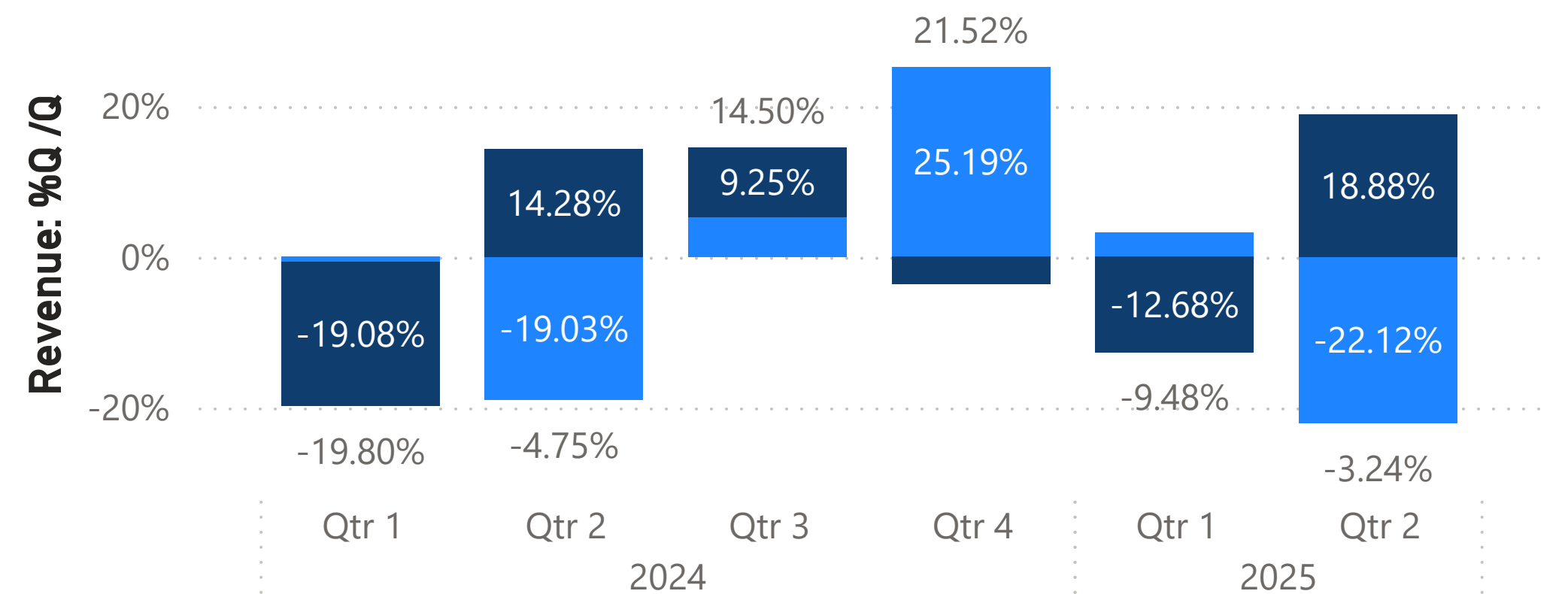
3. TOTAL SALES

In Q2 2025, vegetables generated R1.33 billion, comprising 71.04% of total revenue, significantly more than the R0.54 billion generated from fruits, which made up 28.96%. Quarterly, vegetable revenue demonstrated a steady upward trajectory, growing from R1.2 billion in Q2 2024 to R1.3 billion in Q2 2025. Johannesburg (JHB), Tshwane (TSH), Cape Town (CPT), and Durban (DBN) stand out as the predominant markets in terms of revenue, accounting for a substantial portion of the total.

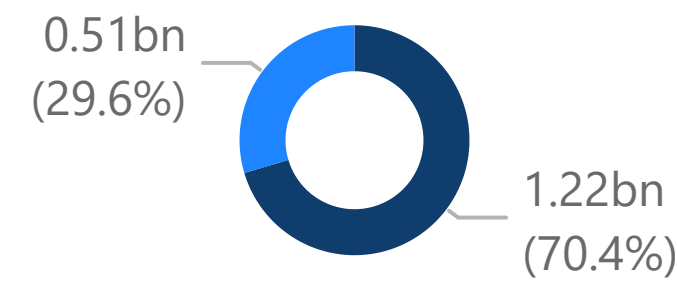
CATEGORY ● Fruit ● Vegetable



CATEGORY ● Fruit ● Vegetable



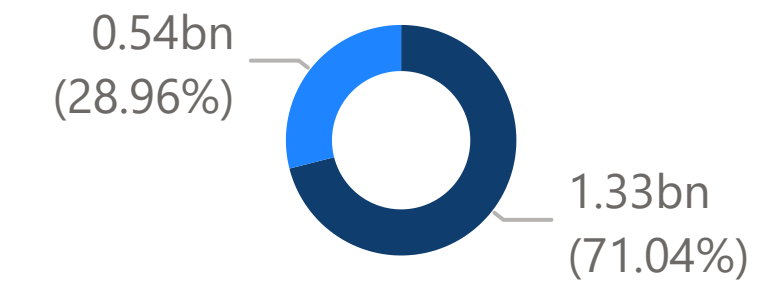
Total Revenue : Q2 2024



CATEGORY ● Vegetable ● Fruit

● Vegetable
● Fruit

Total Revenue: Q2 2025

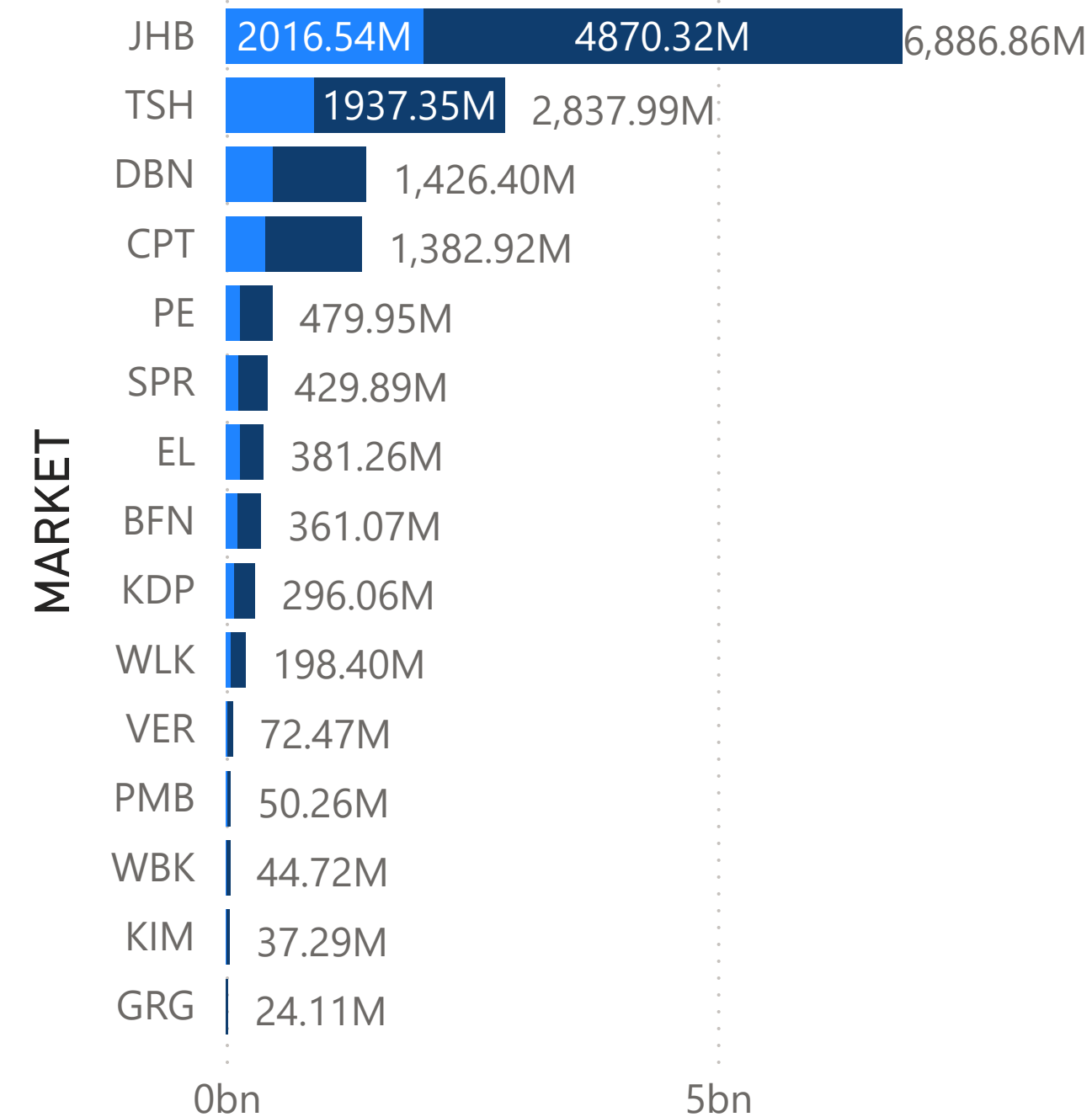


CATEGORY ● Vegetable ● Fruit

● Vegetable
● Fruit

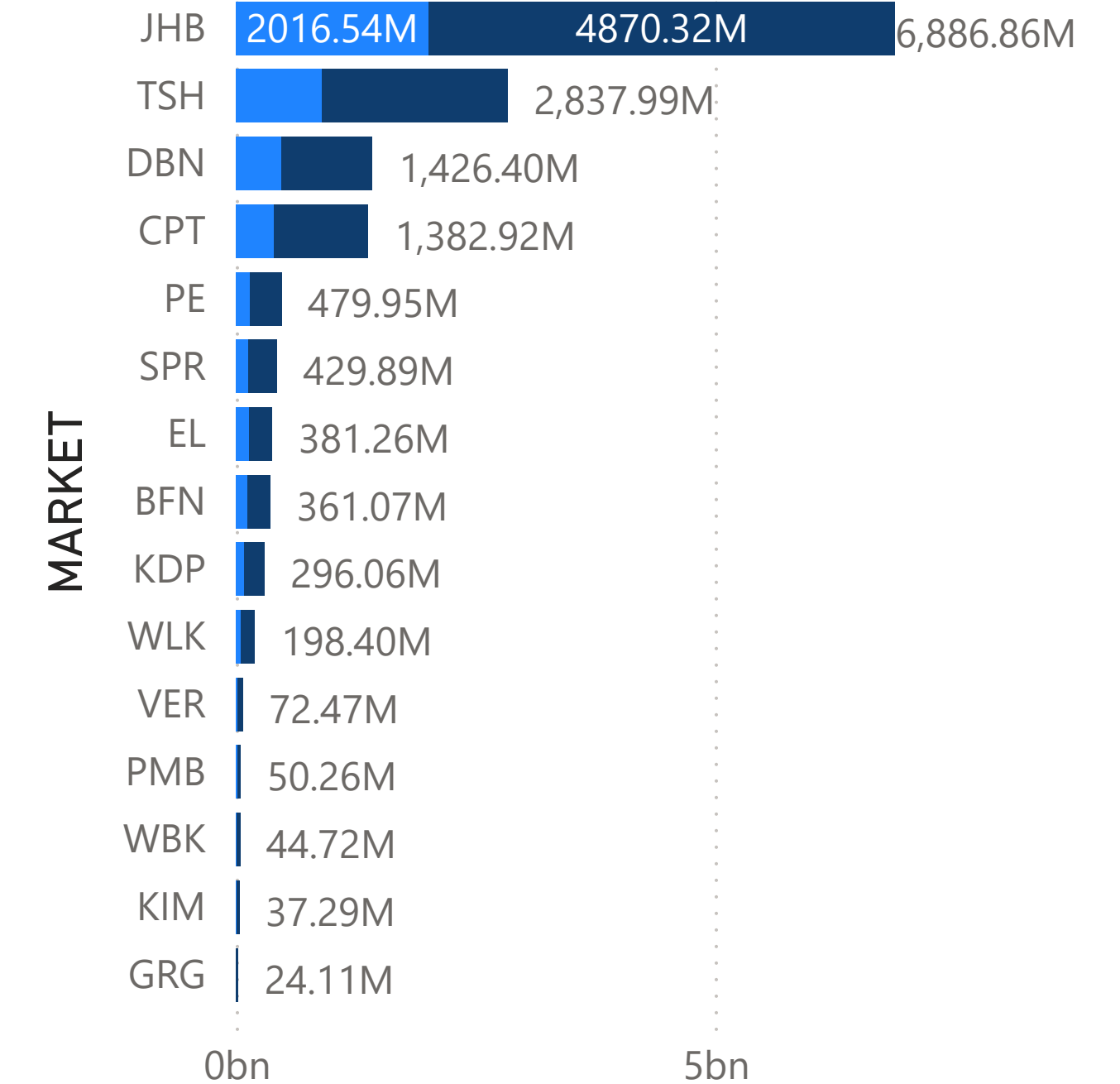
Revenue (R): Q2 2024

● Fruit ● Vegetable



Revenue (R) : Q2 2025

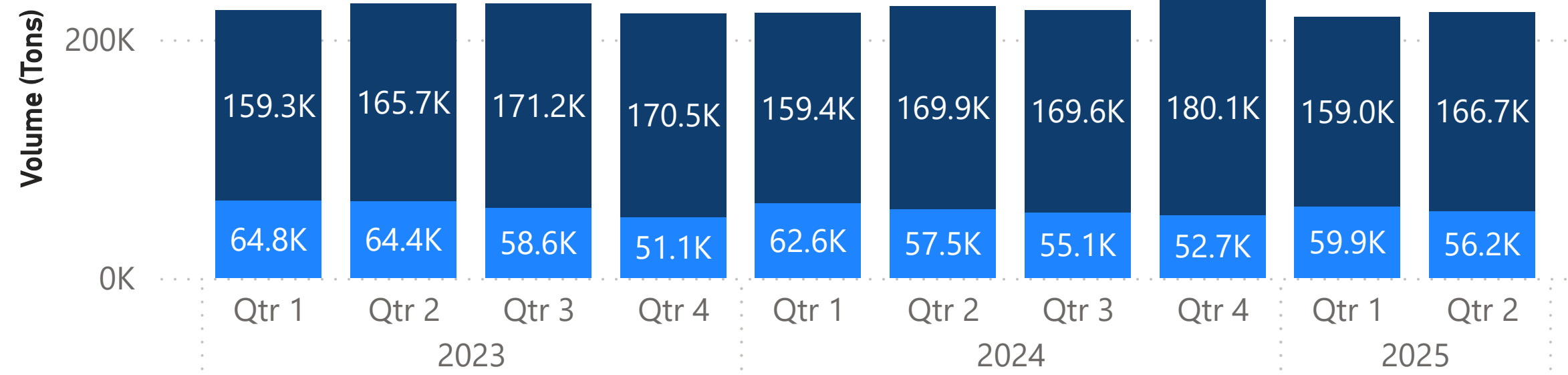
● Fruit ● Vegetable



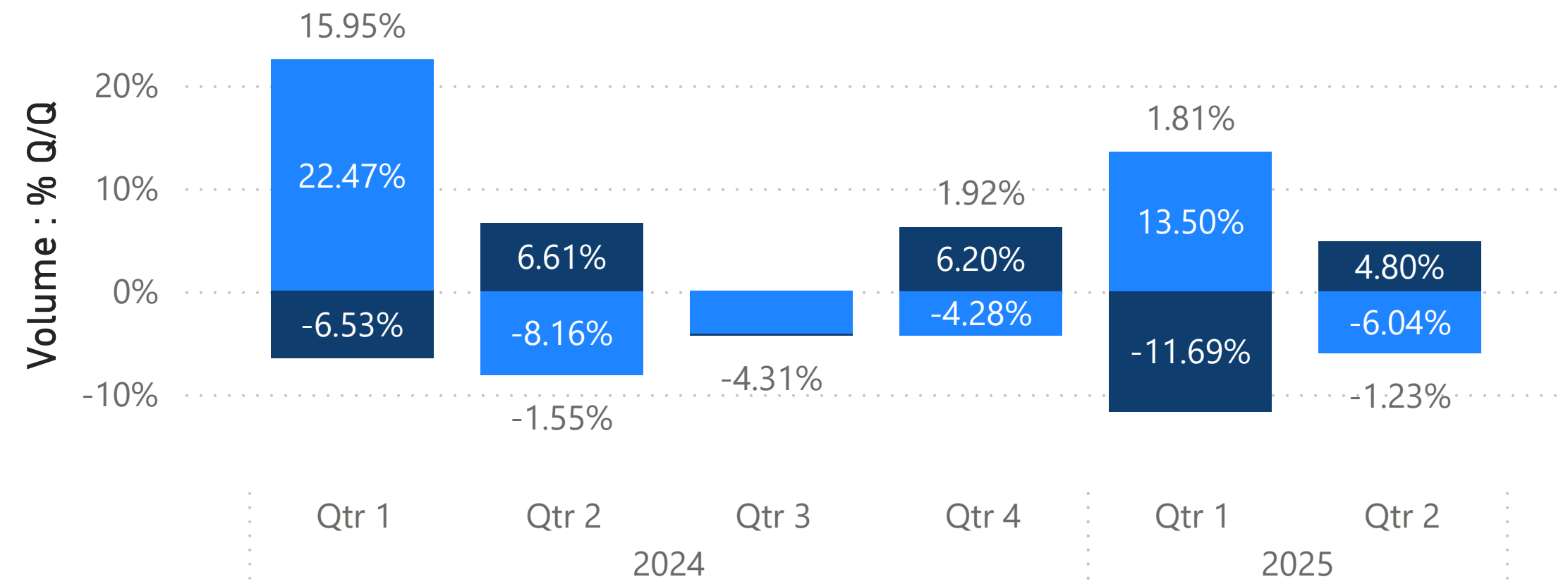
4. TOTAL VOLUME

In Q2 2025, fresh produce markets recorded 222.9 thousand tons of produce, with vegetables making up 166.7 thousand tons, representing 74.77% of the total, and fruits comprising 56.2 thousand tons, or 25.23%. Quarterly volume trends largely followed revenue patterns, with vegetable supply showing a steady increase, while fruit volumes experienced more fluctuations. Johannesburg (JHB), Tshwane (TSH), Cape Town (CPT), and Durban (DBN) stand out as the predominant markets in terms of volume, accounting for more than 80% of the market share.

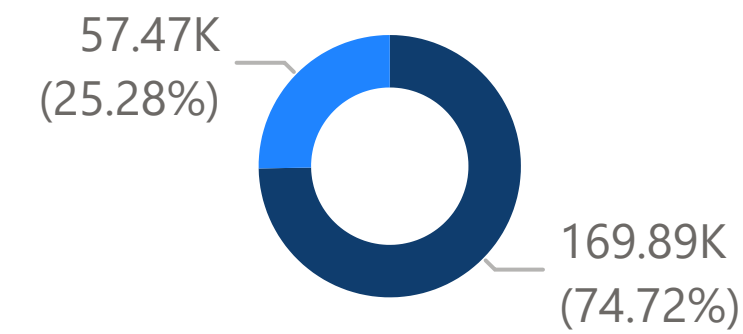
CATEGORY ● Fruit ● Vegetable



CATEGORY ● Fruit ● Vegetable



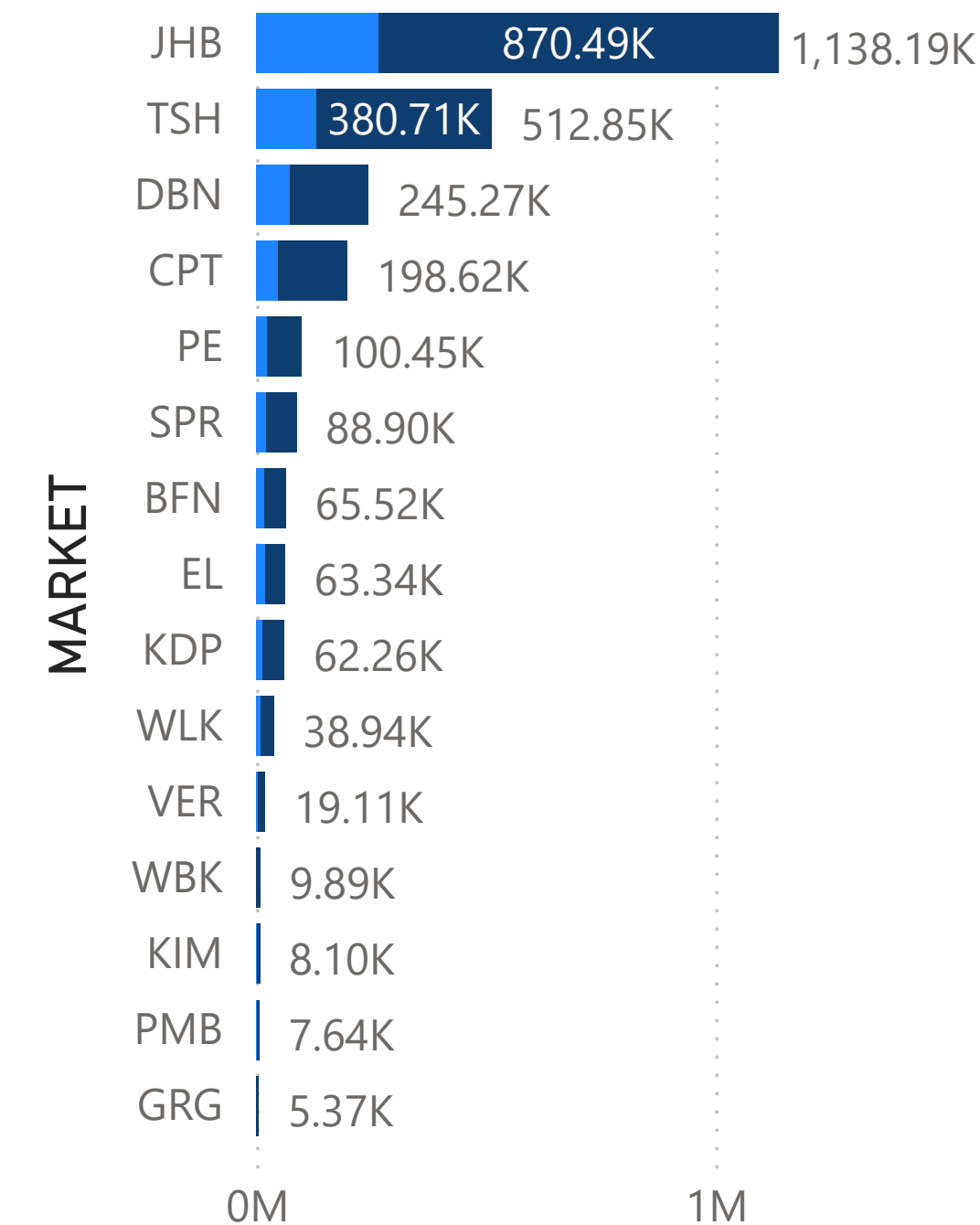
Total Volume : Q2 2024



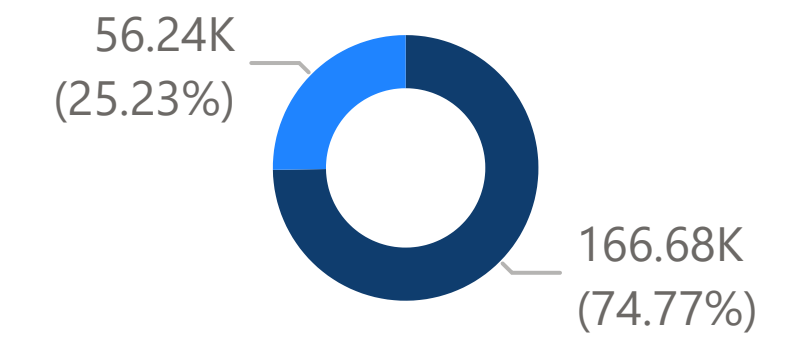
CATEGORY ● Vegetable ● Fruit

Volume (Tons) : Q2 2024

● Fruit ● Vegetable



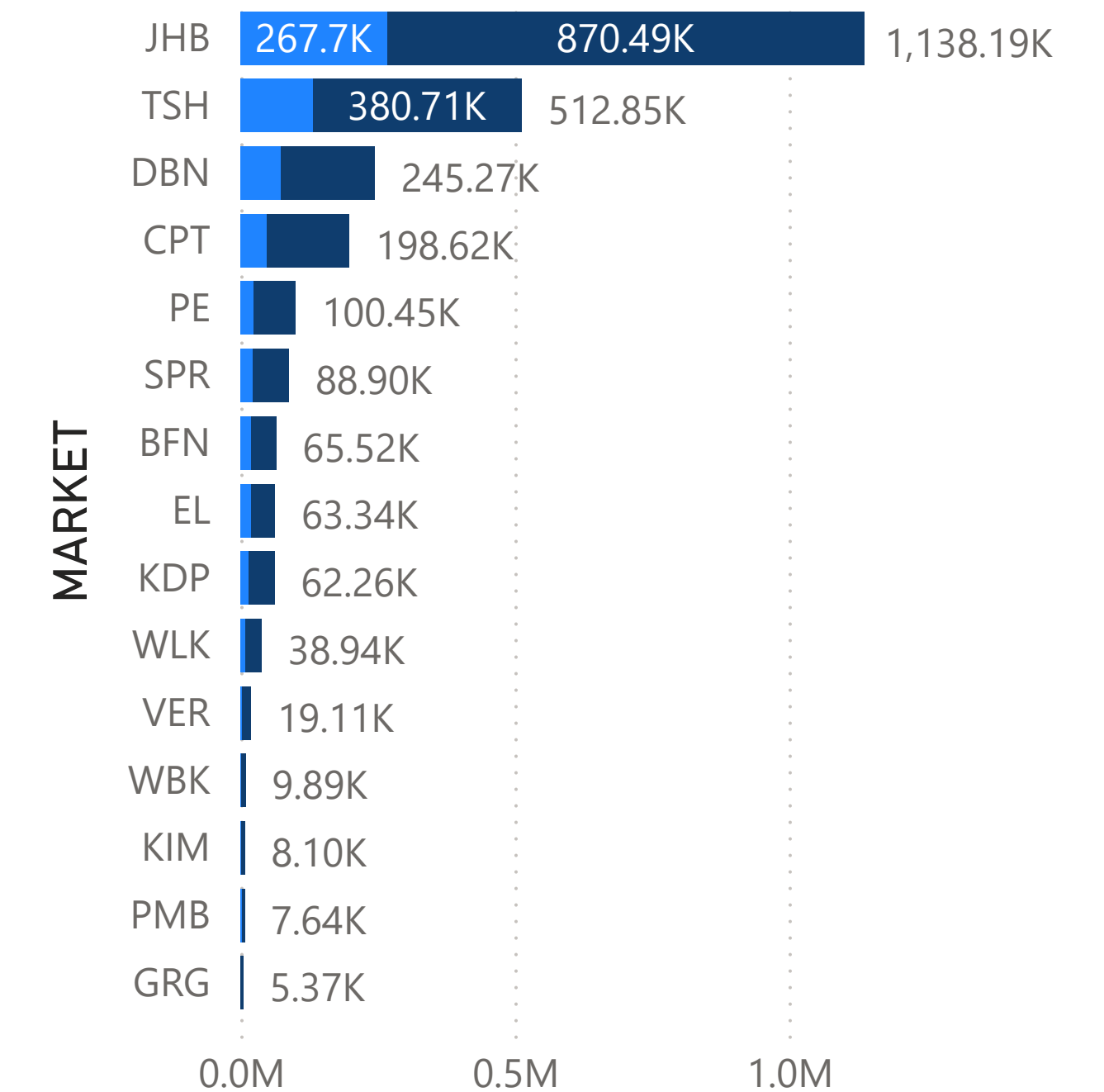
Total Volume: Q2 2025



CATEGORY ● Vegetable ● Fruit

Volume (Tons) : Q2 2025

● Fruit ● Vegetable

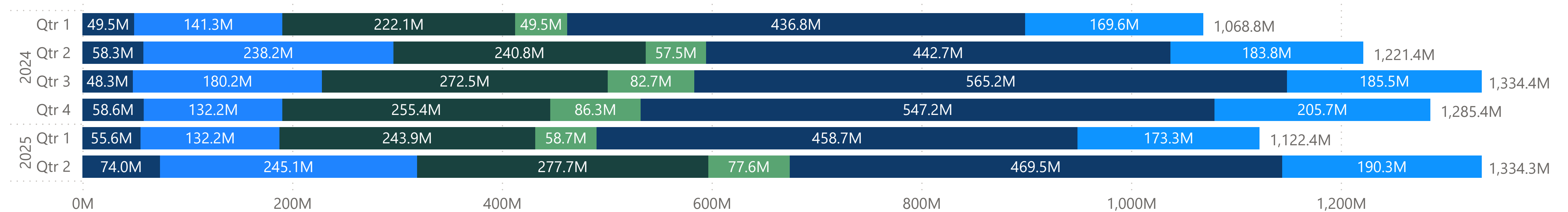


5. ESTIMATED VOLUME AND SALES OF VEGETABLES

Between Q2 2024 and Q2 2025, vegetable sales increased from R1.22 billion to R1.33 billion, driven mainly by higher prices rather than larger volumes. While sales of peppers, carrots, and other vegetables increased by 35%, 27%, and 15.3%, respectively. The volumes of carrots and tomatoes decreased, and pepper volumes remained stable, indicating stronger price realization. Potatoes and onions remained the highest contributors in both value and volume, with onion volumes increasing by 4.6 percent and potato volumes remaining steady. Comparing Q1 and Q2 of 2025, total sales increased by 17.6%, with onion sales increasing by 85%, carrots by 33%, and peppers by 32%. These increases were supported by volume growth in onions and potatoes, while carrot, tomato, and pepper volumes decreased. This reflects a period of stronger market activity, where higher earnings were driven by both seasonal increases in supply and higher prices.

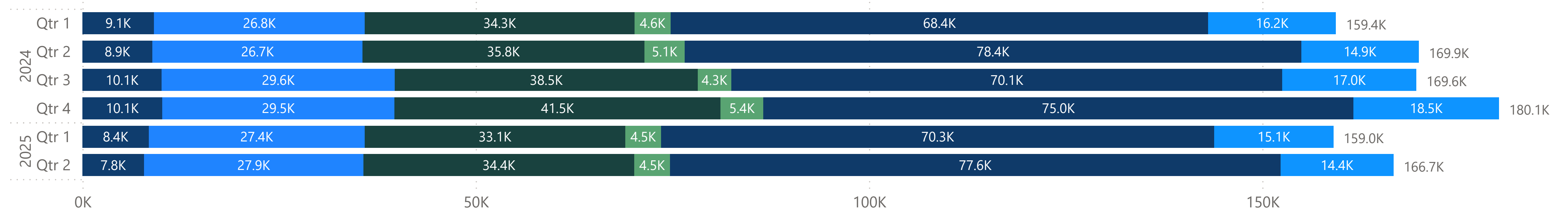
Top 5 Vegetables :Revenue (Rands)

Classification ● CARROTS ● ONIONS ● OTHER VEGETABLES ● PEPPERS ● POTATOES ● TOMATOES



Top 5 Vegetables: Volume (Tons)

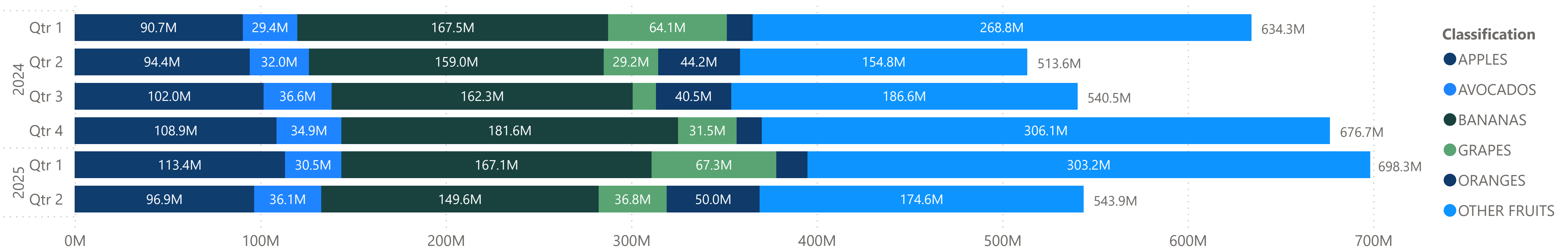
Classification ● CARROTS ● ONIONS ● OTHER VEGETABLES ● PEPPERS ● POTATOES ● TOMATOES



6. ESTIMATED VOLUME AND SALES OF FRUITS

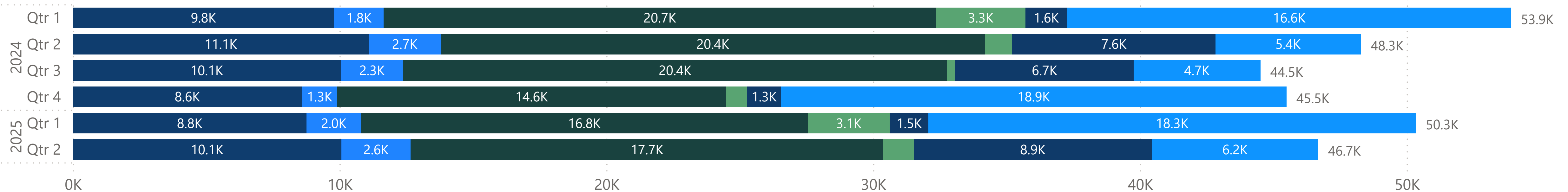
Between Q2 2024 and Q2 2025, smallholder fruit sales increased slightly from R513.6 million to R514.7 million, with volume also increasing. Oranges and avocados recorded increases in both sales and volume, while bananas and apples experienced lower sales despite higher volumes, indicating price declines. Grape sales increased by 25.9%, driven by stronger prices despite lower supply. Comparing Q1 and Q2 of 2025, total fruit sales decreased by 26.9%, mainly due to a 42.4% decline in the "Other Fruits" category. While avocados increased in both sales and volume, apples and bananas showed higher volumes but lower revenue, reflecting downward pressure on prices. These patterns highlight the influence of seasonal supply and pricing on smallholder fruit performance.

Top 5 Fruits: Revenue (Rands)



Top 5 Fruits: Volume (Tons)

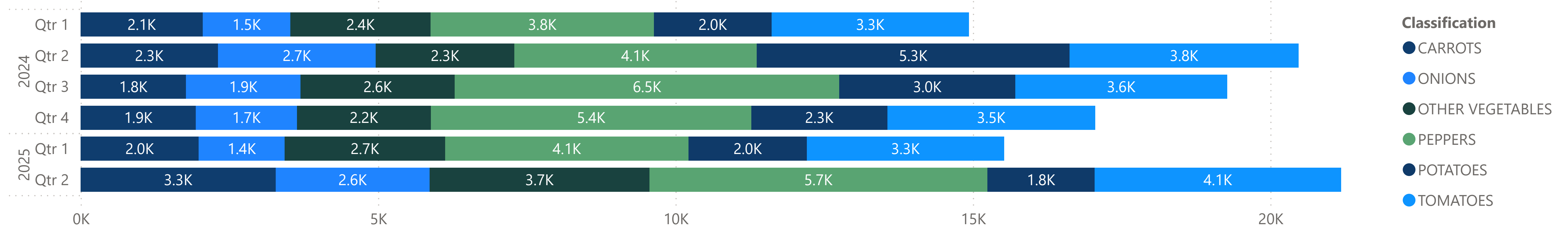
Classification ● APPLES ● AVOCADOS ● BANANAS ● GRAPES ● ORANGES ● OTHER FRUITS



7. VEGETABLE PRICES

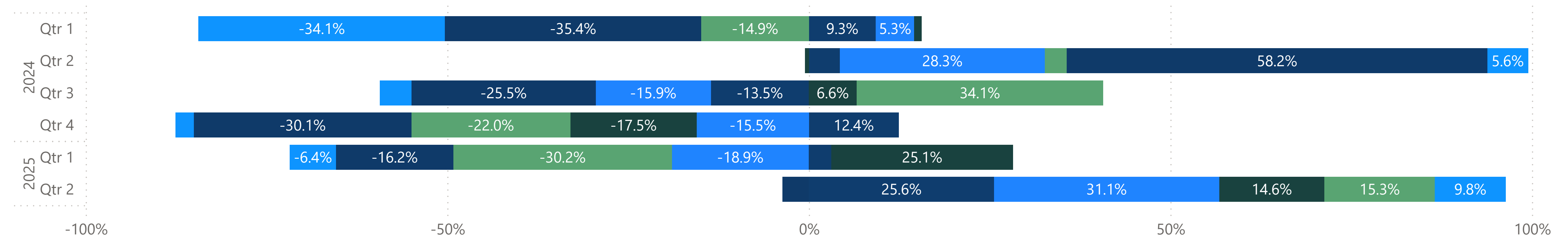
Between Q2 2024 and Q2 2025, vegetable prices per ton increased across most crops, indicating improved market returns for smallholder farmers. Carrot prices increased by 42 percent from R2 311/ton to R3 282/ton, peppers by 39 percent, other vegetables by 59%, and tomatoes by 8%. Onion prices declined slightly, while potatoes dropped sharply by 66% from R5 259/ton to R1 806/ton. Comparing Q1 and Q2 of 2025, prices increased significantly for most commodities: carrots increased by 65.1%, onions by 79.1 percent, other vegetables by 37%, peppers by 38.8%, and tomatoes by 24.9%. Potatoes, however, continued to decline, decreasing by 9.2%. These quarter-on-quarter shifts, combined with the annual trends, highlight the impact of seasonal supply, demand changes, and market conditions on smallholder vegetable pricing.

Top 5 Vegetables: Average Prices (R/T)



Quarter to Quarter % Price Change

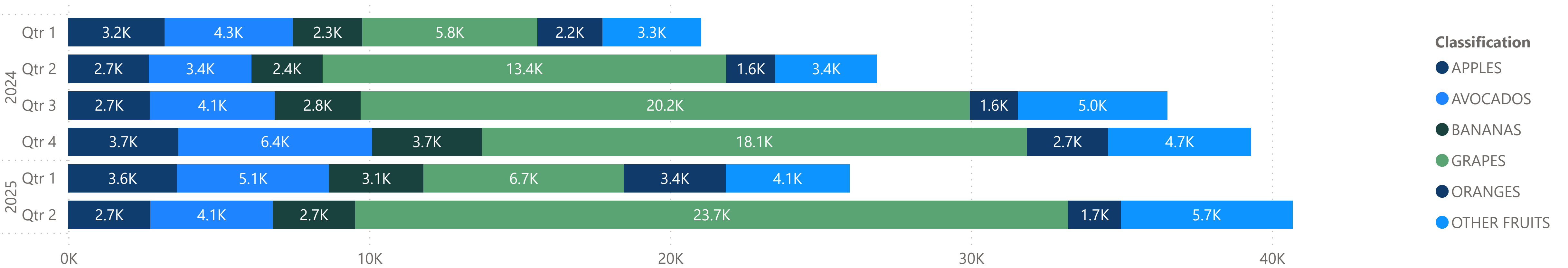
Classification ● CARROTS ● ONIONS ● OTHER VEGETABLES ● PEPPERS ● POTATOES ● TOMATOES



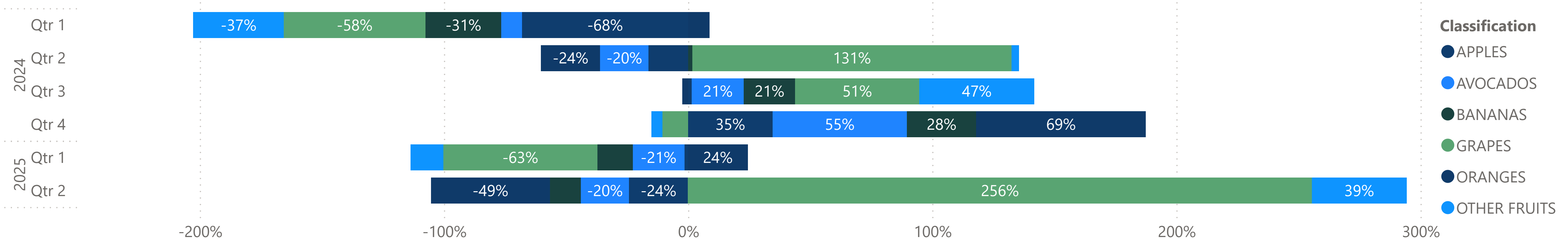
8. FRUIT PRICES

Between Q2 2024 and Q2 2025, fruit prices per ton varied across commodities due to seasonality and market shifts. Apples increased by 2.1% from R2 679/ton to R2 735/ton, bananas by 15.9% from R2 355/ton to R2 731/ton, and grapes by 76.8% from R13 410/ton to R23 710/ton. Avocados decreased by 19.8% from R3,418 to R4,069, and oranges declined by 5.5% from R1 642/ton to R1 734/ton. "Other Fruits" increased by 68.9% from R3 376/ton to R5 705/ton. Comparing Q1 and Q2 of 2025, most fruits recorded price decreases: apples fell by 24.2%, avocados by 19.7%, bananas by 12.7%, and oranges by 48.7%. In contrast, grapes increased by 255.5% and "Other Fruits" by 38.8%. These movements reflect the influence of seasonal supply and market demand on smallholder fruit pricing.

Top 5 Fruits: Average Prices (R/T)



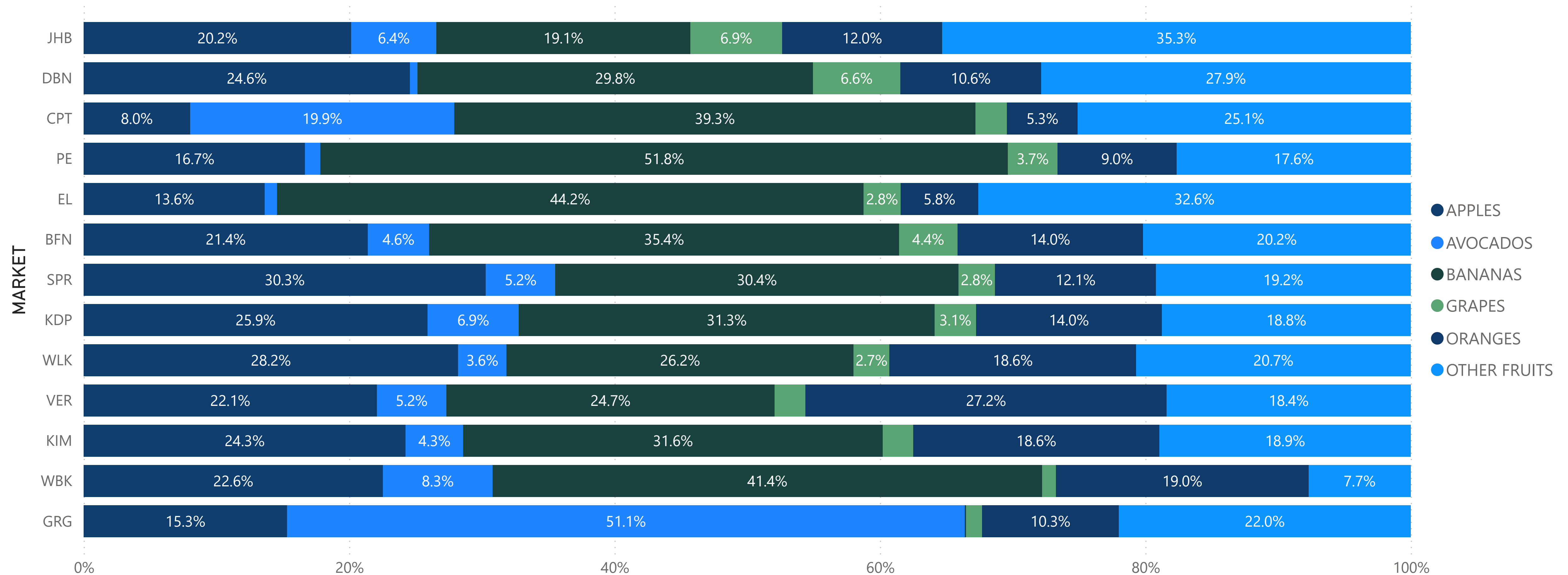
Quarter to Quarter % Price Change



9. FRUIT MARKET SHARES

Within the fruit market, bananas demonstrate widespread importance, constituting high shares across numerous markets, though market share is not uniform. Major markets such as Johannesburg (with 35.3% in "Other Fruits" and 20.2% in Apples) and Durban (29.8% in Bananas) exhibit diversified portfolios, while specialized mid-sized and smaller markets, such as Port Elizabeth (51.8% bananas) and George (51.1% bananas), show strong concentrations, indicating specific regional demand or efficient distribution. This structure highlights tailored supply chain opportunities, with bananas being a key commodity and "Other Fruits" also constituting high demand in some markets.

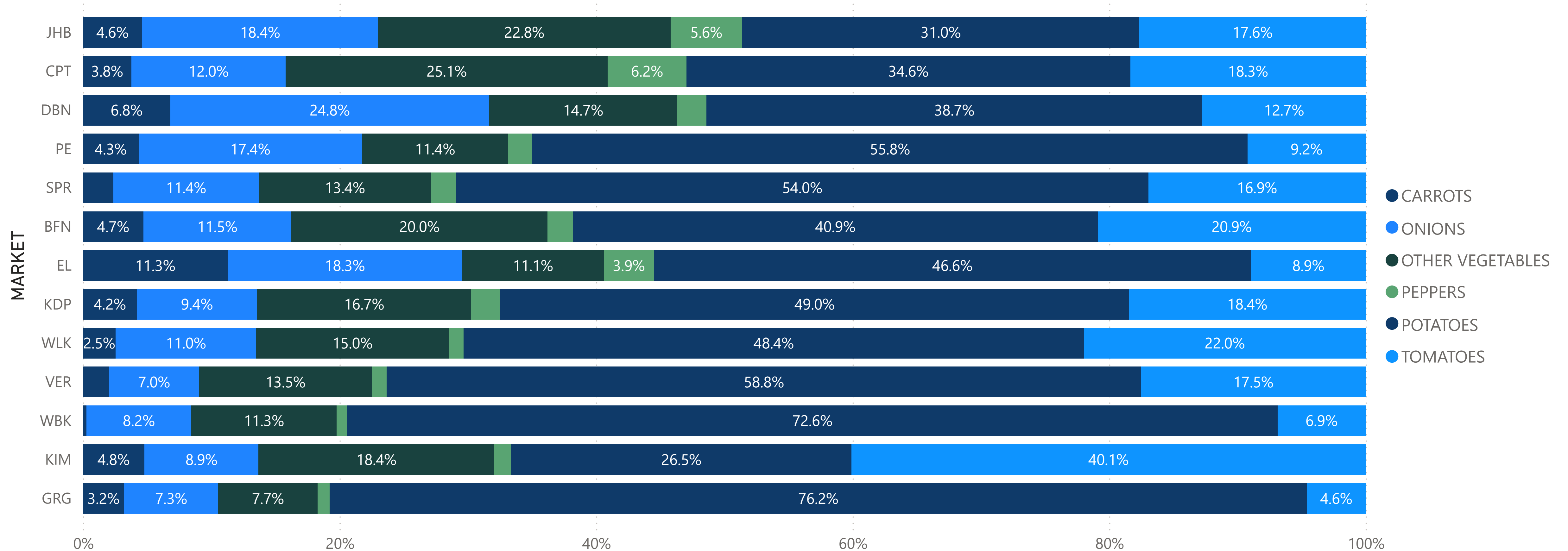
Fruit Shares in Q2 2025



10. VEGETABLE MARKET SHARES

Potatoes are the dominant vegetable across a vast number of markets, constituting exceptionally high shares that far surpass other types. While major markets such as Johannesburg (31.0% in potatoes and 17.6% in tomatoes), Cape Town (34.6% in potatoes and 18.3% in tomatoes), and Durban handle large overall volumes with clear leading vegetables, smaller markets exhibit remarkable specialization. For instance, Kimberley absorbs about 76.2% of its vegetables as potatoes, and other markets such as Witbank (72.6%), Vereeniging (58.8%), and Port Elizabeth (55.8%) also show very high potato concentrations, functioning as critical regional distribution hubs. This distinct hierarchical structure, where major markets handle broader ranges and smaller ones intensely specialize, highlights clear opportunities for targeted production and optimized logistics for farmers.

Vegetable Market Shares in Q2 2025



10. CONCLUSION

The Q1 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 steady and robust growth over the analyzed period. This strong performance positions vegetables as a more stable segment for market participants. While potatoes and bananas clearly dominate their respective categories as key staples, prices for high-value commodities such as peppers and avocados exhibit significant volatility, often experiencing quarter-on-quarter fluctuations, which contrasts sharply with the more stable and predictable returns observed from staple vegetables. The market structure is highly concentrated, with major markets such as Johannesburg, Tshwane, Cape Town, and Durban collectively handling over 80% of the total produce flow, acting as primary fresh produce markets. Beyond these dominant markets, numerous mid-sized and smaller markets display strong commodity specialization, particularly in potatoes and bananas, indicating localized demand and supply chains. This structured hierarchy, characterized by both diversified major hubs and intense specialization in large markets, highlights clear opportunities for smallholder farmers to strategically align their production with demand and optimize their supply chain strategies for improved market access and enhanced profitability.

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