NAMC
Promoting market access for South African agriculture

SMALLHOLDER MARKET ACCESS ESTIMATES (SMAE)

QUARTER 4 2025/2026

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ABBREVIATIONS

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

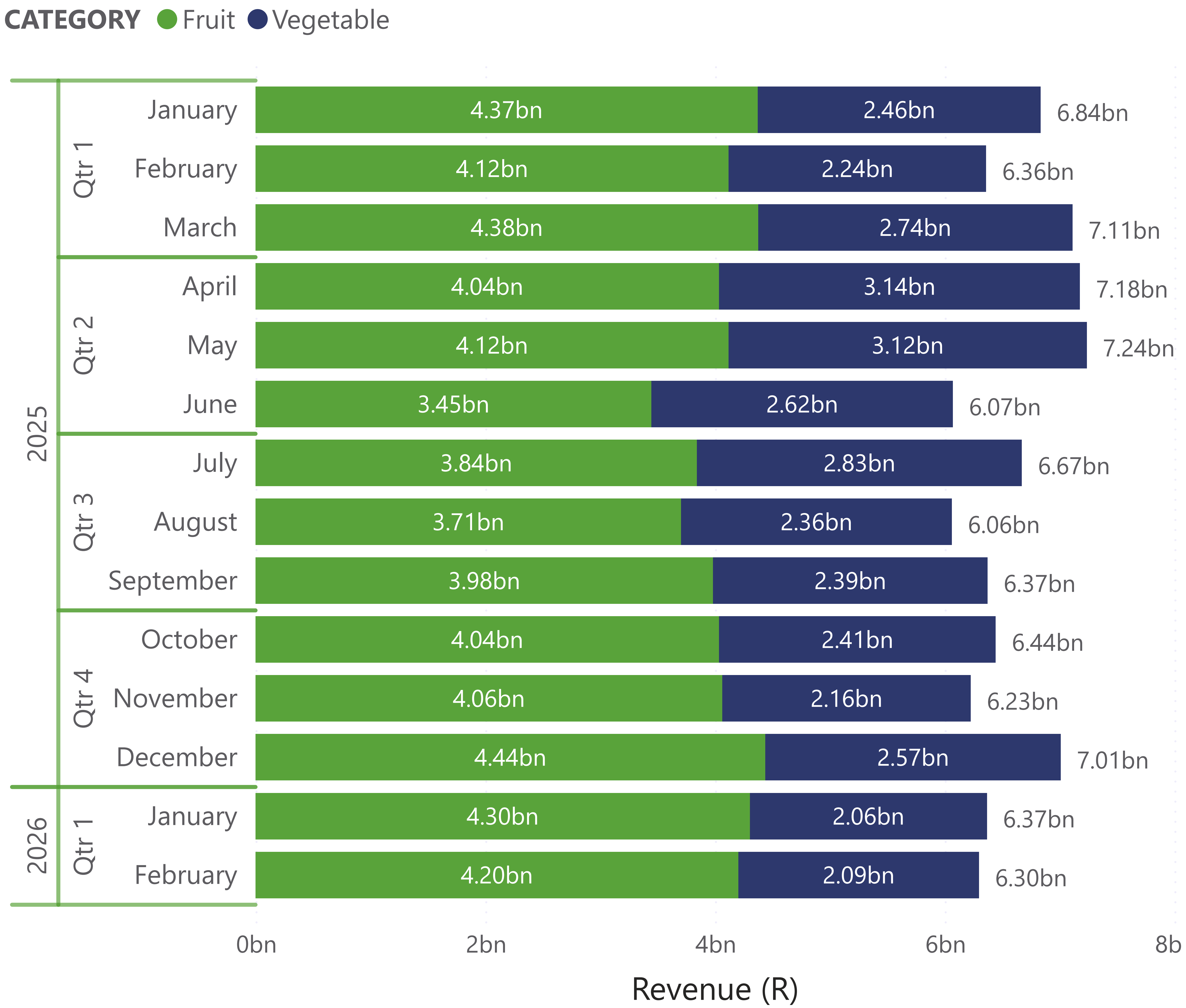
This report estimates smallholder market access at National Fresh Produce Markets (NFPMs) in South Africa for the period from Q1 2024 to Q3 2025. The focus is on the volume of fresh produce supplied by smallholder farmers to these markets, the revenue generated, and the average producer prices per ton. 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.

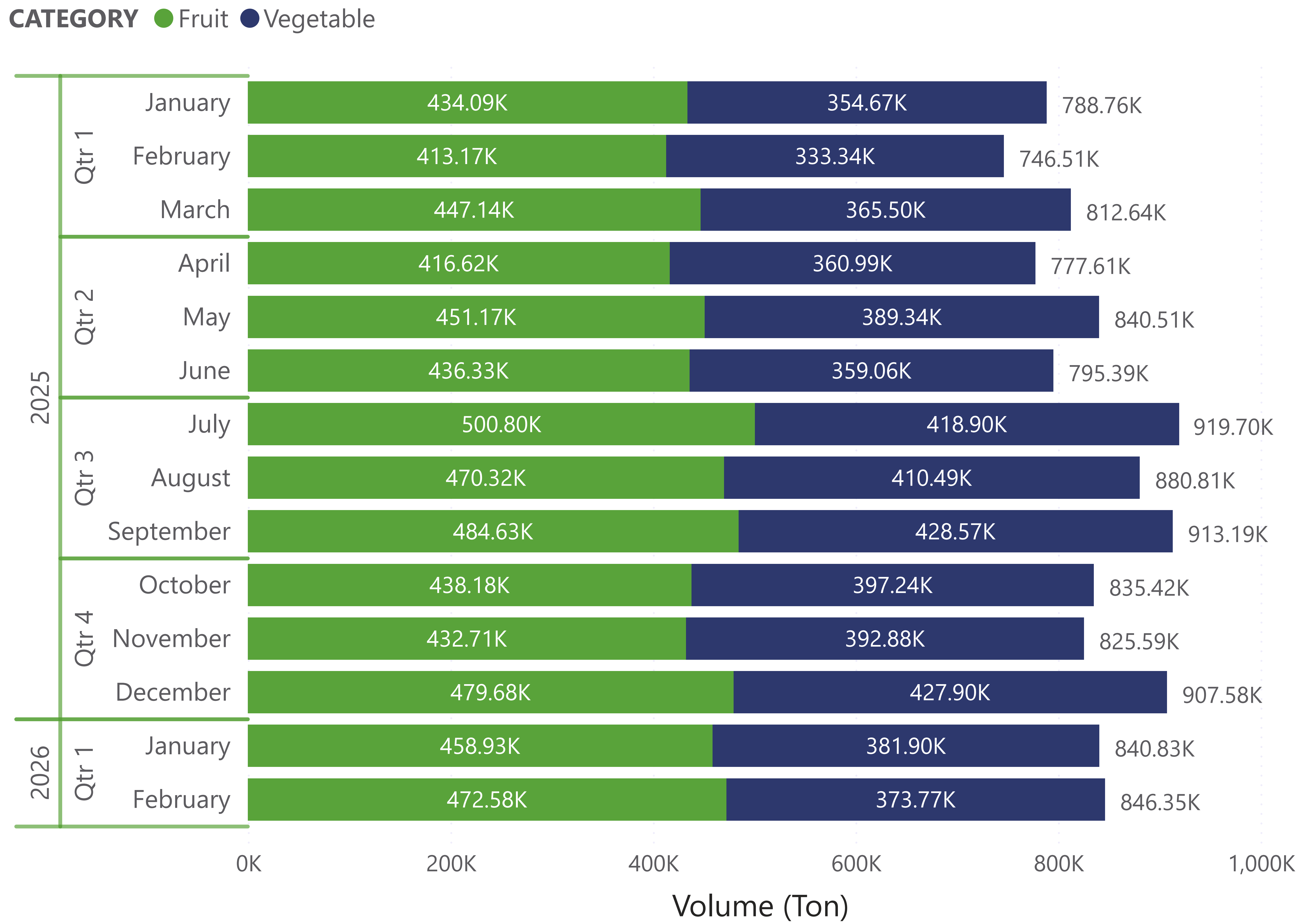
2. OVERVIEW

This report analyses smallholder market access using fresh produce data from Q1 2025 to Q1 2026 across selected Fresh Produce Markets, focusing on revenue, volume, and pricing trends. The market showed a decrease in total revenue, with Q1 2025 January at R8.84 billion decreasing to R6.37 billion in Q1 2026 January, and Q1 2025 February at R6.36 billion decreasing to R6.30 billion in Q1 2026 February, showing increased supply and price pressure. While total volumes increased by 12 % to higher levels, suggesting improved production, logistics, and smallholder participation. Vegetables consistently outperformed fruits, accounting for a higher 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, showing destination for certain fresh produce is concentrated. Vegetable supply increased in Q1 2026, exposing smallholders to price volatility in certain commodities such as tomatoes, peppers, and potatoes.

3. TOTAL REVENUE AND VOLUME

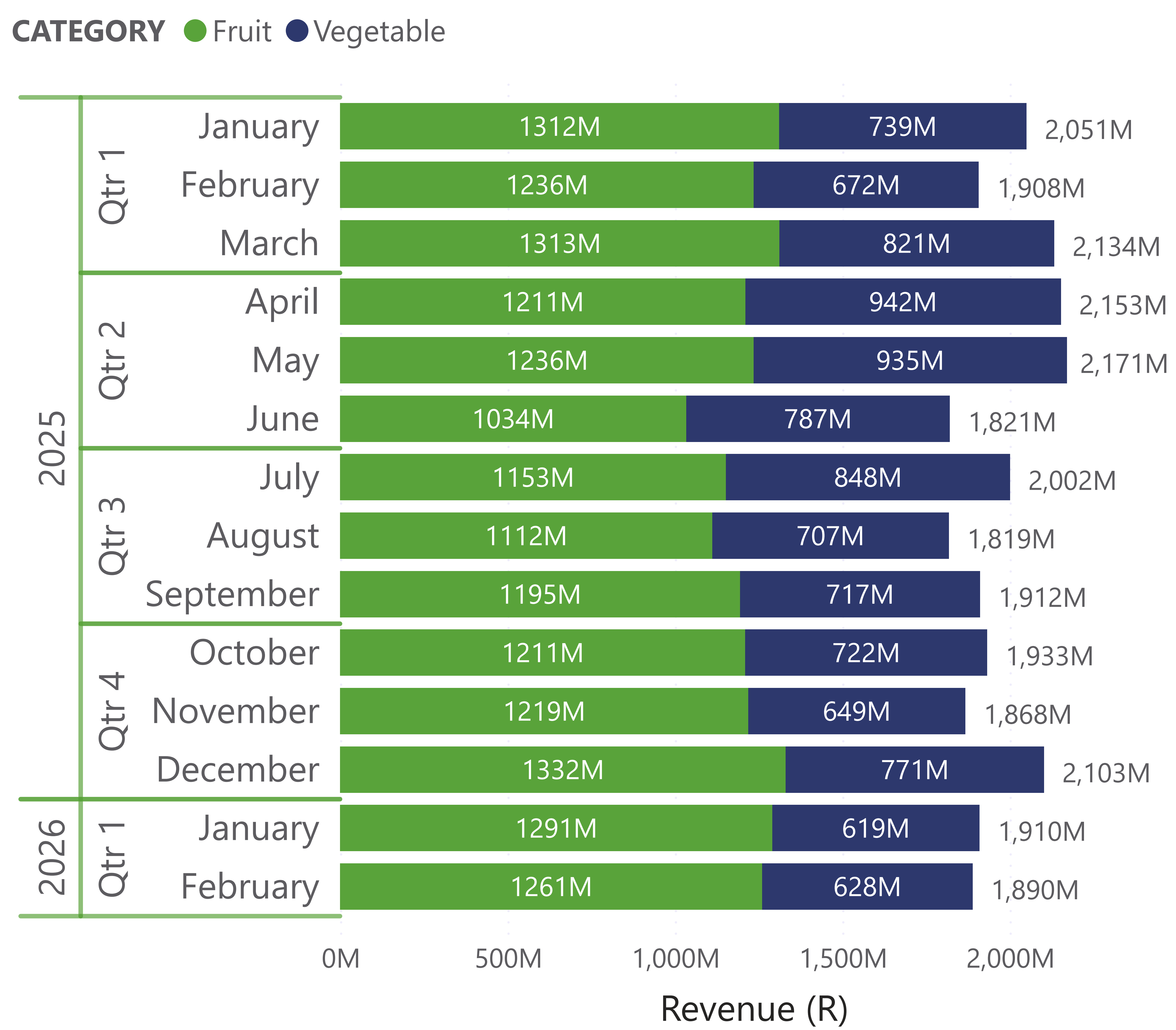
Total revenue decreased from 8.84 billion to 6.37 billion when comparing January 2025 with January 2026. A similar trend is observed between February 2025 and February 2026, where revenue decreased from 6.36 billion to 6.30 billion. The decline is largely driven by increased volumes in the first quarter of 2026, which led to decreased prices and reduced revenue. Within Q1 2026, revenue also decreased from 6.37 billion to 6.30 billion from January to February, showing the effect of increased supply on price levels.



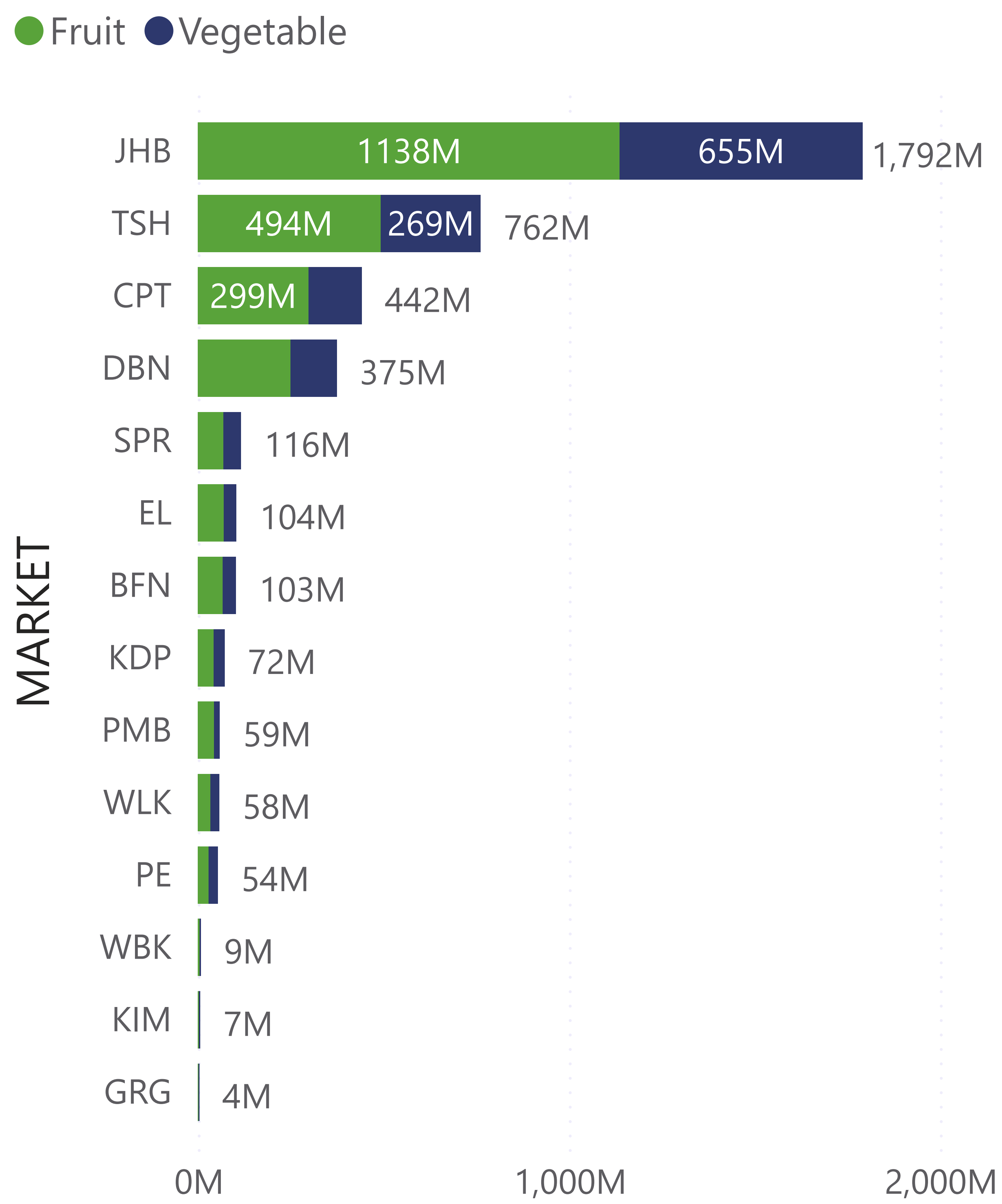


4. ESTIMATED REVENUE FROM SMALLHOLDER FARMERS

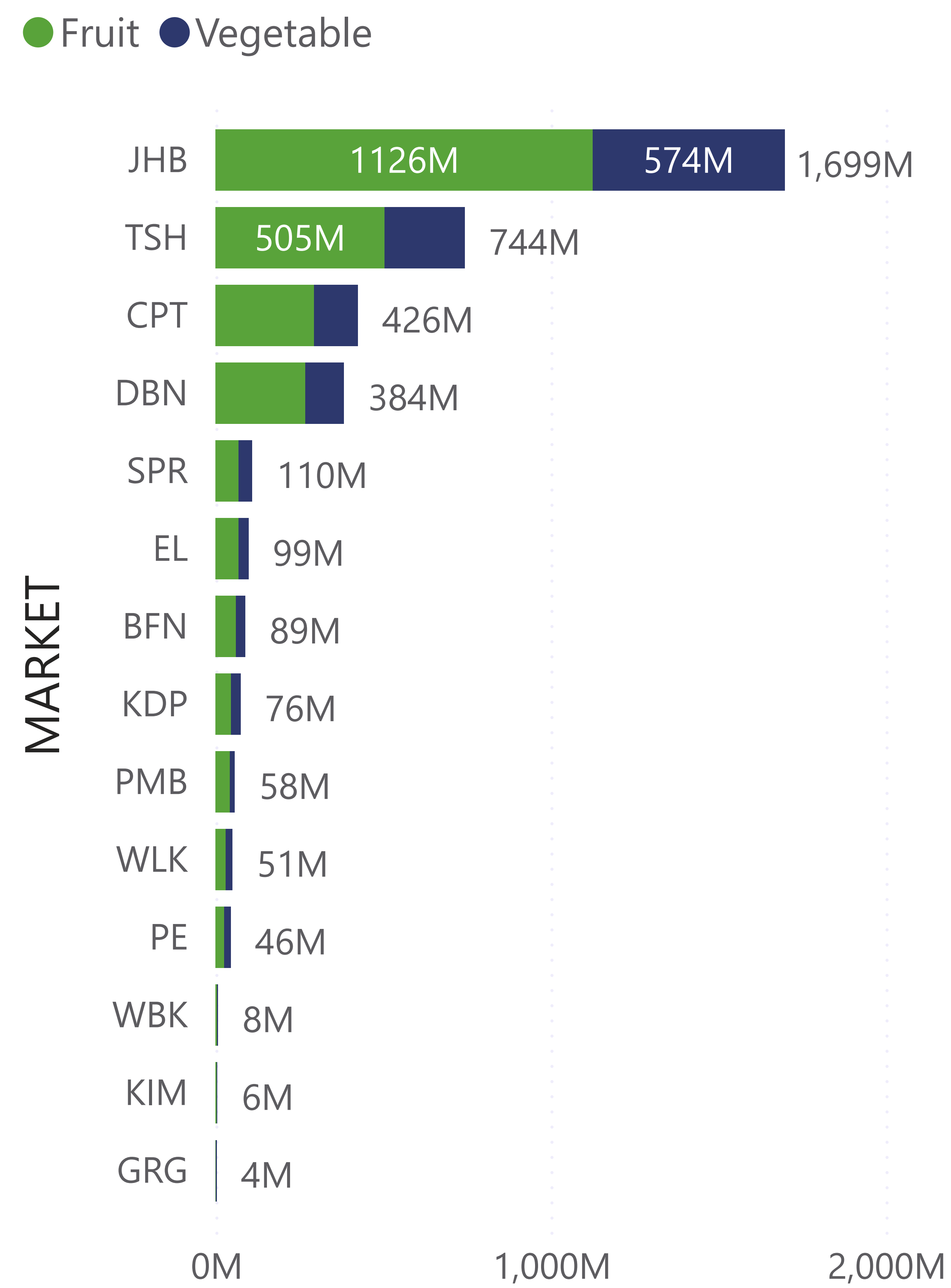
The estimated revenue shows a similar trend to the previous section. Vegetables always accounted higher revenue compared to fruits across considered period. Total revenue decreased from 2.05 billion to 1.91 billion when comparing January 2025 with January 2026. A similar pattern is observed between February 2025 and February 2026, where revenue decreased from 1.91 billion to 1.89 billion. The decline is largely driven by increased volumes in the first quarter of 2026, which led to decreased prices and reduced revenue. Within Q1 2026, revenue also decreased from 1.91 billion to 1.89 billion from January to February, reflecting the effect of increased supply on price levels. Joburg market remains the largest market in terms of both revenue and volume, followed by Tshwane, Cape Town, and Durban market.



Revenue (R) : Q1 2025

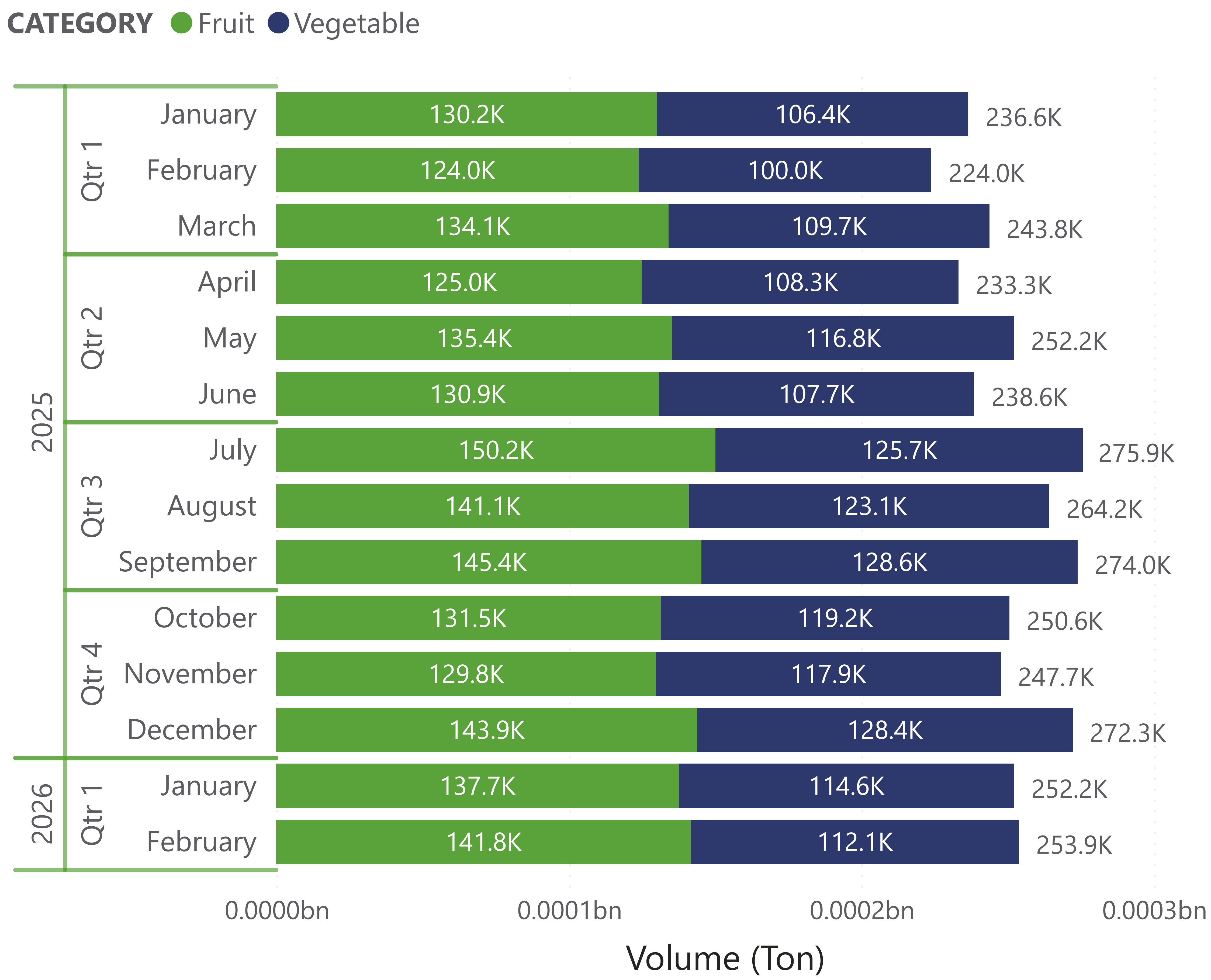


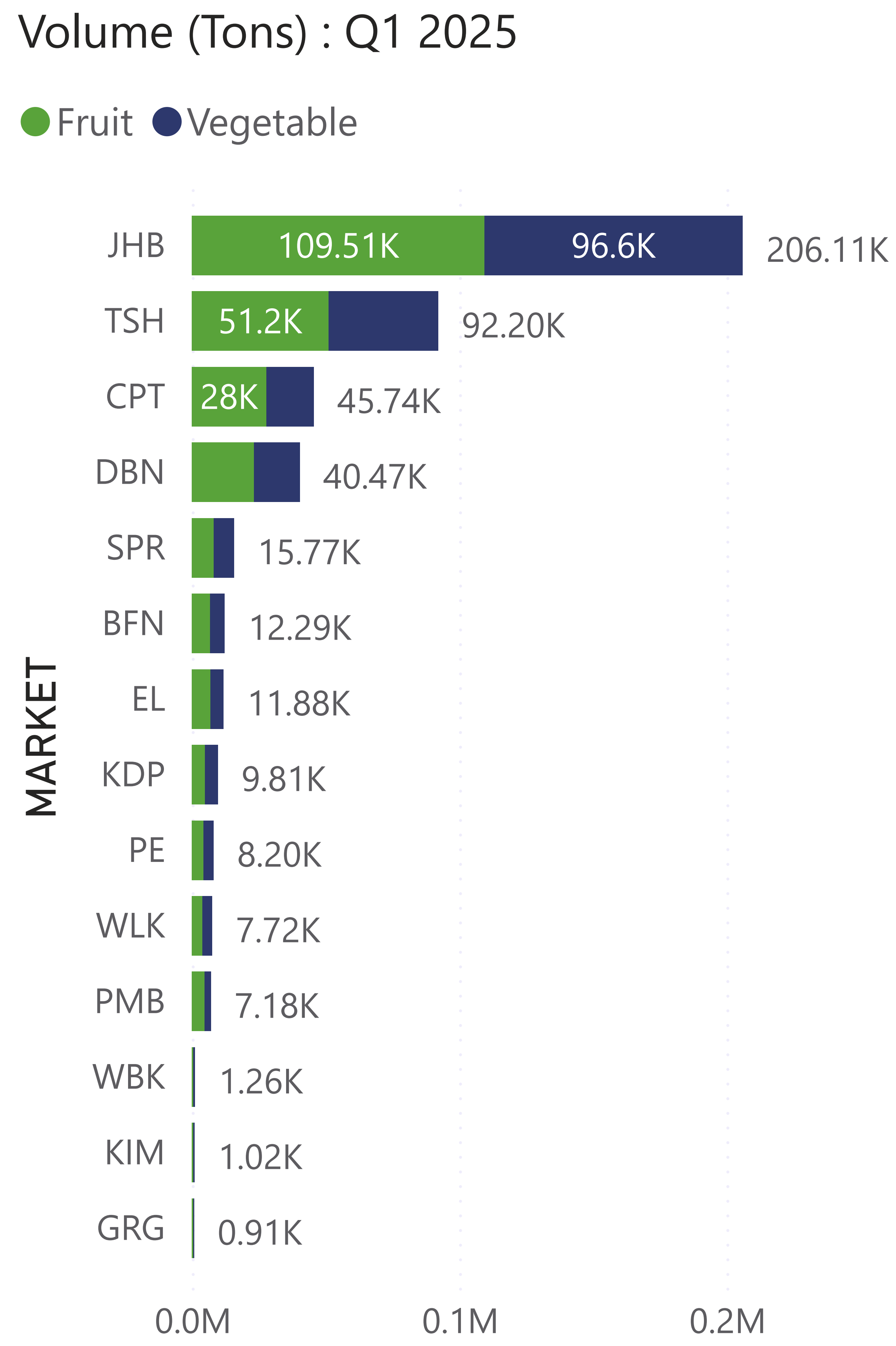
Revenue (R) : Q1 2026

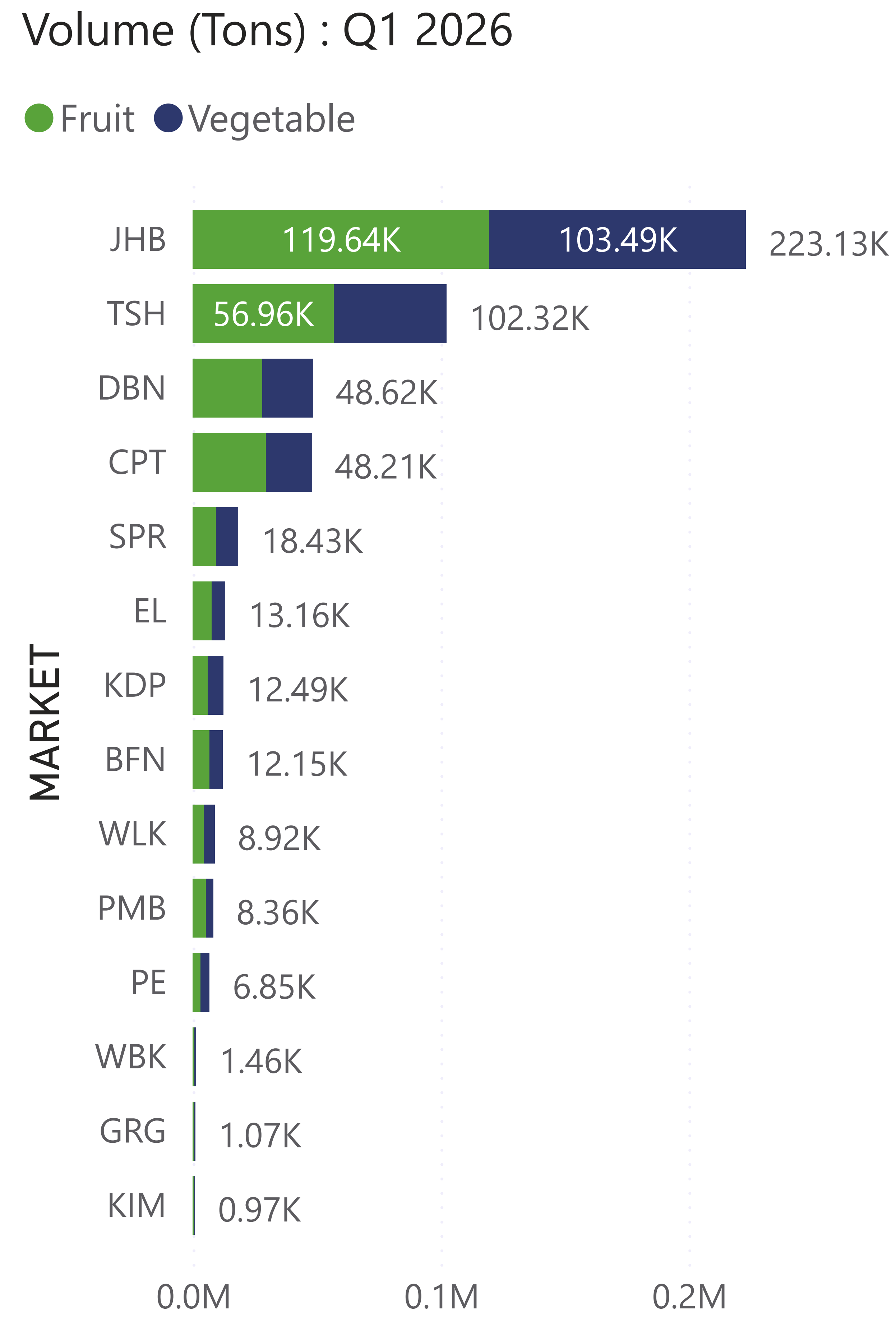


5. ESTIMATED VOLUME FROM SMALLHOLDER FARMERS

Regarding estimated volumes, there is an increase from Q1 2025 to Q1 2026. Vegetable volumes increased from 106.4 thousand tons in January 2025 to 114.6 thousand tons in January 2026. A similar increase is observed when comparing February 2025 and February 2026, where volumes increased from 100.0 thousand tons to 112.1 thousand tons. Fruits also followed a similar upward trend. The top four markets remain the main destinations for fruits and vegetables within the fresh produce market system.







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6. ESTIMATED VOLUME OF VEGETABLES FROM SMALLHOLDER FARMERS

Volumes of staple fresh produce fluctuate throughout the year, peaking in winter and toward the end of the year due to seasonal harvests and holiday demand. Root vegetables and citrus tend to peak in winter, while year end increases reflect festive supply. Fluctuations are more pronounced in peppers, potatoes, and tomatoes, while carrots and onions remain relatively stable. Comparing January 2025 and January 2026, potatoes and other vegetables declined, while carrots, onions, peppers, and tomatoes increased, with the drop in potatoes having a notable impact due to its large market share. A similar pattern is observed between February 2025 and February 2026, while month to month in 2026 shows declines in peppers, tomatoes, other vegetables, and carrots.

Top 5 Vegetables: Volume (Tons)

7. ESTIMATED REVENUE OF VEGETABLES FROM SMALLHOLDER FARMERS

The estimated revenue generated from vegetables by smallholder farmers shows a steady decline in the first quarter (Q1) of 2026 compared to Q1 of 2025. However, a month-to-month comparison indicates that estimated vegetable revenue increased by 0.67% between January and February 2026, with onions, tomatoes, peppers, and other vegetables demonstrating notable improvement.

Top 5 Vegetables: Revenue (Rands)

8. ESTIMATED VOLUME OF FRUITS FROM SMALLHOLDER FARMERS

The estimated volume of fruits produced by smallholder farmers increased by 0.07% in the first quarter (Q1) of 2026 compared to Q1 of 2025. This marginal increase suggests relative stability in fruit production, although the growth remains minimal. The volume of apples, avocados, bananas, and grapes increased on a month-to-month basis between January and February 2026 (Q1 2026), while the volume of other fruits declined by 0.18% over the same period.

Top 5 Fruits: Volume (Tons)

9. ESTIMATED REVENUE OF FRUITS FROM SMALLHOLDER FARMERS

Data shows that bananas are a key contributor to revenue in fresh produce markets, generating between 42 million and 66 million over the period. This is followed by apples, contributing between 27 million and 40 million, with grapes and oranges also playing a significant role. Total fruit revenue shows a slight increase over time. Comparing January 2025 and January 2026, revenue increased from 191.4 million to 200.1 million. When comparing February 2025 and February 2026, a further increase is observed from 185.2 million to 196.1 million. This growth is mainly driven by grapes, avocados, and bananas. However, from January to February 2026, fruit revenue declined, mainly due to lower contributions from bananas and grapes.

Top 5 Fruits: Revenue (Rands)

10. VEGETABLE PRICES

Price data shows that peppers and potatoes exhibit the highest fluctuations, followed by tomatoes, while carrots and onions remain relatively stable. On a year to year basis, tomato prices increased sharply, rising from R309 thousand per ton in January 2025 to R1 088 thousand per ton in January 2026. A similar increase is observed between February 2025 and February 2026, where prices rose from R290 thousand to R511 thousand per ton .Given that volumes increased over the same period, the expectation would be that tomato prices should decrease due to higher supply in the market. However, the observed increase in prices indicates that this expected relationship did not hold, suggesting that other factors are influencing the market. These may include rising input costs, transport and logistics constraints, or supply chain inefficiencies that place upward pressure on prices despite higher volumes. In contrast, prices for carrots and onions remain relatively stable, indicating more consistent supply conditions and limited exposure to such external pressures, which results in less price volatility.

11. FRUIT PRICES

A comparison of Q1 2025 and Q1 2026 shows mixed price movements, with orange prices declining in January while other commodities increased. In February, most prices declined, except apples. From January to February 2026, orange prices increased, while grapes, apples, and bananas declined. Grape and avocado prices remain volatile due to seasonal supply, strong export demand, and production constraints. Grapes were expensive in June 2025 due to limited post harvest supply, while avocado prices peak in January when supply is lowest and ease as supply increases

Quater to Quater Price Change

12. CONCLUSION

The Smallholder Market Access Estimates report highlights a fresh produce market that is adjusting to increased supply conditions, where volumes are increasing but revenue is decreasing due to downward pressure on prices. Total market revenue decreased from R8.84 billion in January 2025 to R6.37 billion in January 2026, and from R6.36 billion to R6.30 billion in February 2026, reflecting the impact of higher supply on market prices. At the same time, total volumes increased, indicating improved production and continued participation of smallholder farmers, although this growth is not yet translating into higher revenues. Vegetables continue to dominate both revenue and volume, although vegetable revenue decreased despite higher volumes, while fruit revenue showed slight growth year on year but declined within Q1 2026. Price trends show that increased volumes have generally been associated with downward pressure on prices, although some commodities such as tomatoes, peppers, and potatoes remain highly volatile, with fluctuations driven by supply conditions and market dynamics. Market share concentration remains high, with major markets such as Joburg, Tshwane, Cape Town, and Durban handling most of the trade, reinforcing their influence on price formation and market access. The findings highlight that while production and volumes are increasing, price movements remain volatile, limiting revenue gains for smallholder farmers and emphasizing the need for stronger market coordination and efficiency.

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