



# NAMMC

Promoting market access for South African agriculture

## SMALLHOLDER MARKET ACCESS ESTIMATES

### QUARTER ONE 2024

*National Agricultural  
Marketing Council*

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## ABBREVIATIONS

BLN	Bloemfontein
CT	Cape Town
DALRRD	Department of Agriculture, Land Reform and Rural Development
DBN	Durban
EL	East London
GDARD	Gauteng Department of Agriculture and Rural Development
JHB	Johannesburg
KDP	Klerksdorp
KIM	Kimberly
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 March 2024 to May 2024. Market access for smallholder farmers is their ability to reach and sell products in various markets, meeting standards for quality, safety, quantity, and consistency. The assessment aligns with the NAMC's Section 7 Committee report on fresh produce market recommendation, which was set to be achieved in 2014. The recommendation is that 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 provisional report on the fresh produce market inquiry suggests that Small, Medium and Micro Enterprises account for less than 1% of proceeds in the NFPMs. The estimation focuses on 15 NFPMs. The primary focus is 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 that 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 February to May 2024 across various national fresh produce markets in South Africa focus on total revenues generated and tonnage from fruits and vegetables. **Table 1** shows the total estimated income generated from fruits and vegetables in different markets between February and May 2024. Over this period, total revenues fluctuated, starting at R 565.7 million in February and increasing to R 630.8 million in April before declining to R 593.8 million in May. Examining the percentage changes shows that February to March recorded a decrease of 2.51%, followed by an adjustment of 5.13% increase from March to April. At the same time, revenue decreased by 3.25% from April to May.

**Table 2** shows the total estimated volume supplied to the National Fresh Produce market between February and May 2024. The volume commenced at 75.7 thousand tons in February, decreased to 74.5 thousand tons in March, increased to 75.7 thousand tons in April, and peaked at 80.9 thousand tons in May. Specific markets, such as Johannesburg and Tshwane, demonstrated stability, while Cape Town and Durban experienced fluctuations in terms of volume. These observations show the dynamic nature of the fresh produce market environments and the challenges based on geographic location. 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 February to May 2024.

**Table 1: Total estimated revenue generated from fruits and vegetables.**

Market	SAME (R)	SMAE (R)	SMAE (R)	SMAE (R)	Av %Δ	Av % Δ	Av % Δ
	Feb-24	Mar-24	Apr-24	May-24	(Feb-March)	(Mar-April)	(April-May)
JOHANNESBURG	250 084 304.91	276 805 943.19	302 684 646.59	279 605 964.27	10.70↑	9.30↑	-7.60↓
TSHWANE	108 108 313.08	111 165 008.08	116 788 880.85	110 642 593.55	2.80↑	5.10↑	-5.30↓
CAPE TOWN	650 955 40.59	63 287 465.65	66 352 515.26	64 202 259.07	-2.80↓	4.80↑	-3.20↓
DURBAN	565 901 99.55	53 496 761.86	55 309 973.10	51 949 287.28	-5.50↓	3.40↑	-6.10↓
SPRINGS	169 895 42.47	16 898 861.50	18 526 521.71	17 904 336.23	-0.50↓	9.60↑	-3.40↓
EAST LONDON	145 480 66.96	13 902 156.65	15 334 584.57	14 444 760.24	-4.40↓	10.30↑	-5.80↓
BLOEMFONTEIN	13 723 893.92	13 498 984.45	14 542 372.52	13 646 378.16	-1.60↓	7.70↑	-6.20↓
KLERKSDORP	101 254 22.06	9 954 703.47	10 812 037.02	10 517 831.19	-1.70↓	8.60↑	-2.70↓
PORT ELIZABETH	8 981 641.35	8 935 161.75	10 019 733.23	9 075 852.60	-0.50↓	12.10↑	-9.40↓
PIETERMARITZBURG	861 014 8.59	8 306 781.97	8 349 743.79	8 573 185.97	-3.50↓	0.5↑0	2.70↑
WELKOM	7 705 461.84	8 035 585.50	8 569 905.60	8 682 404.10	4.30↑	6.60↑	1.30↑
VEREENIGING	1 472 171.10	1 004 064.30	0.00	1 093 409.70	-31.80↓	0.00↑	0.00↑
WITBANK	1 448 251.76	1 415 608.72	1 673 129.81	1 757 868.68	-2.30↓	18.20	5.10↑
KIMBERLEY	1 361 886.00	1 009 170.00	796 055.70	917 493.00	-25.90↓	-21.10↓	15.30↑
GEORGE	830 981.32	1 039 219.04	1 059 180.45	810 422.40	25.10	1.90↑	-23.50↓
<b>Total</b>	<b>565 675 825.49</b>	<b>588 755 476.13</b>	<b>630 819 280.19</b>	<b>593 824 046.46</b>	<b>-2.51↓</b>	<b>5.13↑</b>	<b>-3.25↓</b>

**Table 2: Total estimated volume of fruits and vegetables.**

Market	SMAE (Ton)	SMAE (Ton)	SMAE (Ton)	SMAE (Ton)	Av %Δ	Av %Δ	Av %Δ
	Feb 2024	March 2024	April 2024	May 2024	(Feb-March)	(March-April)	(April-May)
JOHANNESBURG	32 930.12	33 733.58	34 736.27	36 561.63	2.40↑	3.00↑	5.30↑
TSHWANE	15 375.31	14 765.06	14 879.56	16 035.28	-4.00↓	0.80↑	7.80↑
CAPE TOWN	7 684.11	6 641.13	6 820.55	7 753.63	-13.60↓	2.70↑	13.70↑
DURBAN	7 256.85	6 809.25	6 665.76	7 082.09	-6.20↓	-2.10↓	6.20↑
SPRINGS	2 585.13	2 816.33	2 686.40	2 991.54	8.90	-4.60↓	11.40↑
BLOEMFONTEIN	1 904.59	1 824.19	1 892.42	2 017.92	-4.20↓	3.70↑	6.60↑
EAST LONDON	1 868.74	1 756.58	2 054.33	1 888.42	-6.00↓	17.00↑	-8.10↓
KLERKSDORP	1 520.01	1 592.21	1 595.05	1 708.71	4.70↑	0.20↑	7.10↑
PORT ELIZABETH	1 309.57	1 313.77	1 438.33	1 307.12	0.30↑	9.50↑	-9.10↓
PIETERMARITZBURG	1 255.88	1 241.21	1 231.22	1 407.51	-1.20↓	-0.80↓	14.30↑
WELKOM	1 169.73	1 276.36	1 267.95	1 451.53	9.10	-0.70↓	14.50↑
WITBANK	241.37	229.04	258.97	289.17	-5.10↓	13.10↑	11.70↑
VEREENIGING	240.85	200.30	0.00	217.89	-16.80↓	0.00↑	0.00↑
KIMBERLEY	207.56	153.22	124.56	153.20	-26.20↓	-18.70↓	23.00↑
GEORGE	117.92	124.64	136.24	113.87	5.70↑	9.30↑	-16.40↓
<b>Total</b>	<b>75 667.73</b>	<b>74 476.87</b>	<b>75 787.62</b>	<b>80 979.52</b>	<b>-3.48↓</b>	<b>2.16↑</b>	<b>5.87↑</b>

### 3. VEGETABLES-FEBRUARY TO MAY 2024

This report section focuses on the smallholder market access estimates for the top twenty vegetables across selected fresh produce markets based on revenue and volume from February to May 2024. The data entails 96 vegetables across 15 fresh produce markets, of which only the top twenty have been visualized. The remaining vegetables have been categorized under the 'Other vegetable' category. We averaged the data within this period from February to May 2024. **Table 3** illustrates various vegetables' smallholder market access estimates 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 National Fresh Produce Market. Therefore, during the period in question, the average SMAE for vegetables in terms of revenue is **R 395 million**. This revenue is further analysed to explain market share distribution per commodity and market.

The approach shows that potatoes dominate the market with a 38.81% share, followed by tomatoes at 15.88% and onions at 15.7%. Carrots and peppers contribute 4.79% and 4.66%, respectively. These five vegetables collectively account for approximately 79.84% of the SMAE. This concentration regarding vegetables is concerning because many farmers might face market access constraints regarding other vegetables. Vegetables ranked sixth to twentieth, contributing 16.33%, while others constitute approximately 3.82%. The SMAE is concentrated in four markets: Johannesburg (JHB), Tshwane (TSH), Durban (DBN), and Cape Town (CPT). Johannesburg stands out with a 46.93% market share, followed by Tshwane (18.16%), Cape Town (10.65%), and Durban (9.07%). These four markets account for 84.81% of smallholder market access estimates, while the remaining 15.19% is distributed among other markets.

Current preliminary evidence from the Competition Commission investigation shows that the concentration in geographic location and commodities is due to few agents controlling many commodities supplied at the fresh produce market. In addition, this oligopolistic structure allocates more space to specific commodities, adding to this concentration. Onions are produced throughout the country, with the highest producing provinces such as Western Cape, Northern Cape, North West and Limpopo; however, they are concentrated at Tshwane, Joburg, Durban, and Cape Town. This oligopolistic nature of agents, markets, and commodities negatively impacts transformation. Aggregating the markets' contribution by province shows that Gauteng Province (JHB, TSH, and VER) dominates with 47.11% of smallholder market access estimates, 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 SMAE of the total volume supplied at different NFPs during the period in question. The distribution of smallholder market access estimates in terms of volume may differ from that of revenue, as certain vegetables, despite being high in weight, may not necessarily translate to high revenue. The average SMAE for vegetables in terms of volume, which is **56 thousand tons**, is presented in percentages to explain market share distribution per commodity and sales channel. Applied the approach described above, potatoes and onions are ranked first and second in volume, contributing 45.04% and 16.31%, respectively, followed by tomatoes at 9.21%, cabbage at 6.29%, and carrots at 5.38%. Collectively, these vegetables amount to 82.23% of the SMAE in terms of volume, and the distribution across markets follows a similar pattern as the distribution in terms of revenue.

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PMB	KDP	WLKM	PE	WBK	GRJ	KIM	VER	
POTATOES	16.02%	7.18%	3.63%	3.75%	1.89%	1.13%	1.05%	1.03%	0.94%	0.89%	0.74%	0.21%	0.11%	0.09%	0.16%	<b>38.81%</b>
TOMATOES	7.81%	2.59%	2.06%	1.19%	0.45%	0.26%	0.44%	0.25%	0.35%	0.30%	0.07%	0.01%	0.03%	0.06%	0.00%	<b>15.88%</b>
ONIONS	8.25%	2.74%	1.10%	1.79%	0.31%	0.40%	0.26%	0.26%	0.16%	0.15%	0.20%	0.02%	0.04%	0.01%	0.01%	<b>15.70%</b>
CARROTS	2.23%	0.86%	0.42%	0.57%	0.09%	0.26%	0.10%	0.13%	0.07%	0.03%	0.01%	0.00%	0.01%	0.01%	0.00%	<b>4.79%</b>
PEPPERS	2.42%	0.89%	0.69%	0.33%	0.07%	0.09%	0.05%	0.04%	0.04%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	<b>4.66%</b>
CABBAGE	1.25%	0.66%	0.15%	0.25%	0.10%	0.06%	0.15%	0.02%	0.13%	0.12%	0.01%	0.01%	0.00%	0.02%	0.00%	<b>2.94%</b>
LETTUCE	0.90%	0.36%	0.18%	0.25%	0.03%	0.01%	0.04%	0.01%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	<b>1.80%</b>
BUTTERNUT SQUASHES	0.83%	0.32%	0.28%	0.11%	0.02%	0.06%	0.01%	0.04%	0.01%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	<b>1.71%</b>
ENGLISH CUCUMBERS	0.98%	0.30%	0.31%	0.00%	0.02%	0.00%	0.03%	0.00%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.67%</b>
BEETROOT	0.77%	0.32%	0.07%	0.05%	0.03%	0.03%	0.03%	0.02%	0.05%	0.02%	0.00%	0.00%	0.00%	0.01%	0.00%	<b>1.41%</b>
PUMPKINS	0.35%	0.14%	0.13%	0.01%	0.02%	0.01%	0.06%	0.03%	0.04%	0.03%	0.00%	0.00%	0.01%	0.01%	0.00%	<b>0.85%</b>
SWEET POTATOES	0.36%	0.20%	0.16%	0.02%	0.01%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.79%</b>
GREEN BEANS	0.41%	0.17%	0.11%	0.03%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.76%</b>
GINGER	0.41%	0.12%	0.14%	0.03%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.71%</b>
GARLIC	0.34%	0.10%	0.12%	0.08%	0.02%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.68%</b>
BROCCOLI	0.42%	0.14%	0.09%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.66%</b>
CHILLIES	0.36%	0.12%	0.06%	0.05%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.64%</b>
SWEETCORN	0.38%	0.11%	0.10%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.62%</b>
CAULIFLOWER	0.35%	0.11%	0.11%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.62%</b>
SPINACH	0.19%	0.10%	0.03%	0.07%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.47%</b>
OTHER VEGETABLES	1.88%	0.62%	0.71%	0.44%	0.03%	0.01%	0.03%	0.03%	0.03%	0.01%	0.02%	0.00%	0.00%	0.00%	0.00%	<b>3.82%</b>
<b>TOTAL</b>	<b>46.93%</b>	<b>18.16%</b>	<b>10.65%</b>	<b>9.07%</b>	<b>3.13%</b>	<b>2.36%</b>	<b>2.31%</b>	<b>1.88%</b>	<b>1.86%</b>	<b>1.59%</b>	<b>1.16%</b>	<b>0.29%</b>	<b>0.22%</b>	<b>0.21%</b>	<b>0.18%</b>	<b>100%</b>



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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PMB	KDP	WKM	PE	WBK	KIM	VER	GRJ	
POTATOES	18.67%	8.55%	3.66%	4.33%	2.36%	1.24%	1.19%	0.92%	1.18%	1.11%	1.17%	0.25%	0.1%	0.2%	0.12%	<b>45.04%</b>
ONIONS	8.54%	2.96%	1.13%	1.72%	0.37%	0.38%	0.26%	0.22%	0.19%	0.17%	0.25%	0.04%	0.02%	0.02%	0.04%	<b>16.31%</b>
TOMATOES	4.51%	1.49%	1.19%	0.72%	0.30%	0.16%	0.24%	0.05%	0.19%	0.14%	0.14%	0.01%	0.04%	0.00%	0.01%	<b>9.21%</b>
CABBAGE	2.88%	1.60%	0.27%	0.41%	0.21%	0.08%	0.33%	0.02%	0.23%	0.14%	0.04%	0.02%	0.05%	0.01%	0.00%	<b>6.29%</b>
CARROTS	2.61%	1.03%	0.45%	0.60%	0.11%	0.22%	0.09%	0.01%	0.08%	0.05%	0.11%	0.00%	0.01%	0.00%	0.01%	<b>5.38%</b>
BUTTERNUT	1.57%	0.62%	0.56%	0.18%	0.04%	0.07%	0.02%	0.04%	0.01%	0.01%	0.06%	0.00%	0.00%	0.00%	0.00%	<b>3.19%</b>
PEPPERS	1.48%	0.70%	0.40%	0.17%	0.04%	0.04%	0.03%	0.01%	0.03%	0.01%	0.02%	0.01%	0.00%	0.00%	0.00%	<b>2.93%</b>
PUMPKINS	1.14%	0.35%	0.21%	0.03%	0.05%	0.02%	0.14%	0.01%	0.10%	0.08%	0.07%	0.01%	0.01%	0.00%	0.00%	<b>2.23%</b>
BEETROOT	1.12%	0.45%	0.07%	0.06%	0.05%	0.03%	0.04%	0.00%	0.05%	0.03%	0.02%	0.00%	0.01%	0.00%	0.00%	<b>1.93%</b>
LETTUCE	0.46%	0.22%	0.07%	0.18%	0.04%	0.00%	0.03%	0.02%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.04%</b>
SWEET POTATOES	0.43%	0.25%	0.14%	0.02%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.89%</b>
CUCUMBERS	0.49%	0.15%	0.14%	0.00%	0.01%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.83%</b>
SPINACH	0.34%	0.20%	0.02%	0.04%	0.02%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.67%</b>
GREEN BEANS	0.18%	0.16%	0.05%	0.01%	0.00%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.42%</b>
CHILLIES	0.20%	0.09%	0.02%	0.04%	0.01%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.38%</b>
CAULIFLOWER	0.07%	0.03%	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%	<b>0.18%</b>
SWEETCORN	0.06%	0.04%	0.04%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.17%</b>
BROCCOLI	0.09%	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%	0.00%	<b>0.16%</b>
GARLIC	0.04%	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%	<b>0.08%</b>
OTHER	1.24%	0.54%	0.38%	0.21%	0.05%	0.01%	0.04%	0.01%	0.04%	0.03%	0.02%	0.00%	0.00%	0.00%	0.00%	<b>2.58%</b>
<b>TOTAL</b>	<b>46.16%</b>	<b>19.49%</b>	<b>8.90%</b>	<b>8.76%</b>	<b>3.71%</b>	<b>2.30%</b>	<b>2.46%</b>	<b>1.34%</b>	<b>2.14%</b>	<b>1.77%</b>	<b>1.95%</b>	<b>0.35%</b>	<b>0.24%</b>	<b>0.24%</b>	<b>0.20%</b>	<b>100%</b>

## 4. FRUITS—FEBRUARY TO MAY 2024

This section shows the estimated smallholder market access for the top twenty fruits across selected fresh produce markets based on revenue and volume sold. In this data, 60 different fruits are found across 15 fresh produce markets. However, only the top twenty fruits are visualized, 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 within this period from February to May 2024. The average SMAE for fruits in terms of revenue, **R 199 million**, is visualized in percentages to explain distribution per market and commodity.

Bananas and apples dominate the fruit market, accounting for 27.61% and 16.93% of SMAE, respectively. Grapes, mangoes, and avocados have a market share of approximately 16.93%, 8.77%, and 5.26%, respectively. Johannesburg emerges as the leading market with a 44.02% market share, followed by Tshwane with 19.99%, Cape Town with 11.99%, and Durban with 9.84%. These four markets contribute 85.84% of the SMAE, while others account for 14.16%. The fact that Johannesburg, Tshwane, Cape Town, and Durban continue to account for a larger smallholder market share can be attributed to similar factors outlined in the previous section.

The distribution of smallholder market access estimates in terms of volume is illustrated in **Table 6**. In this analysis, the SMAE for fruits in terms of volume, which is **20 thousand tons**, is presented in percentages to explain the distribution across markets and commodities. It is essential to note that the distribution of these estimates varies from revenue, as some fruits, despite being high in weight, do not necessarily translate to high revenue. For instance, smallholder market access estimates show that bananas and apples, ranked first and second in terms of volumes, contribute 33.26% and 18.42%, respectively. They are followed by watermelons at 6.79%, oranges at 6.03% and pears at 5.48%. Collectively, these fruits contribute to 69.98% of the smallholder market access estimates in terms of volume. While fruits ranked sixth to twentieth, holding a 28.60% market share by volume, other fruits only reached 1.41%. The distribution across markets, considering the volume supplied, mirrors the pattern when analysed by revenue.

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

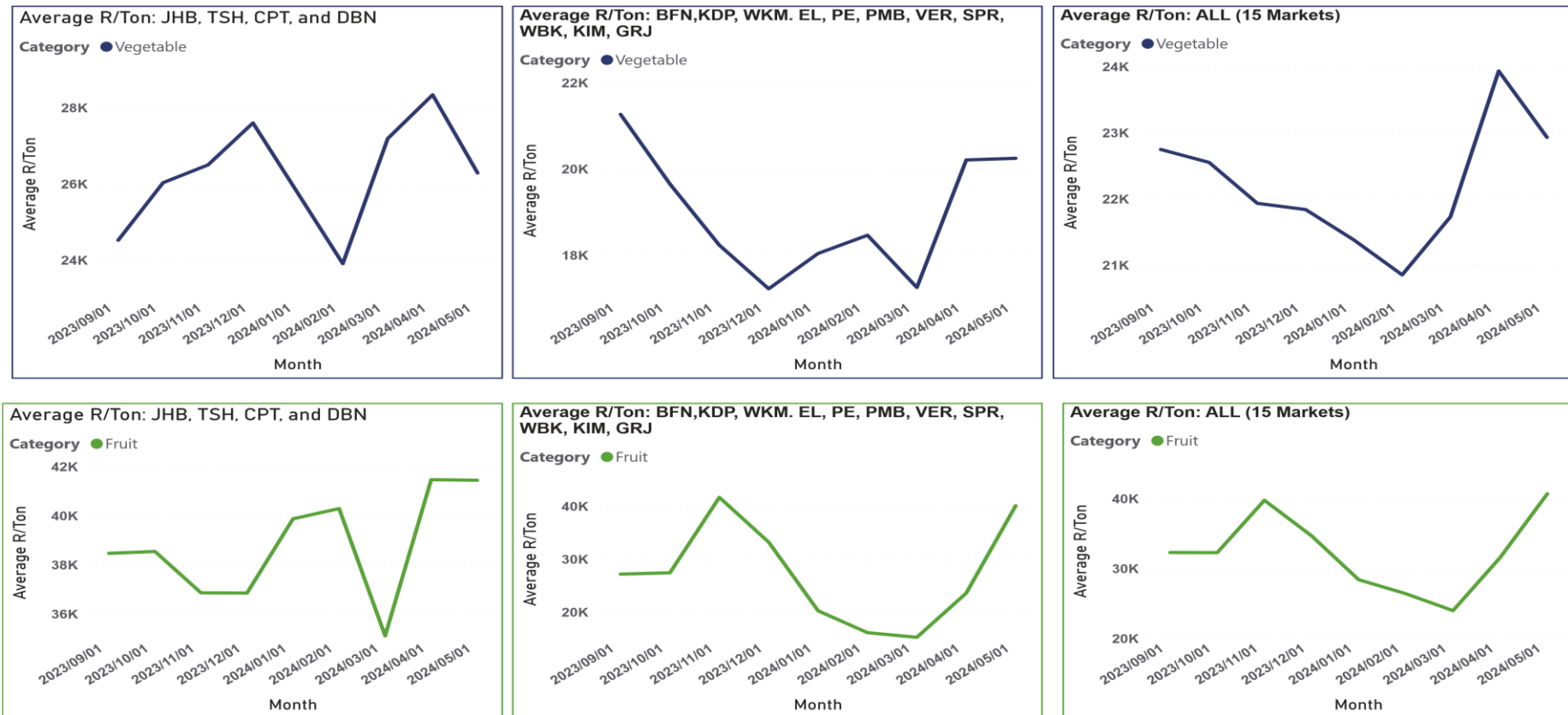
COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PMB	KDS	WLKM	PE	WBK	KIM	VER	GRK	
BANANAS	8.95%	5.45%	4.42%	2.63%	0.97%	1.41%	0.90%	0.83%	0.56%	0.39%	0.85%	0.13%	0.06%	0.06%	0.01%	<b>27.61%</b>
APPLES	7.80%	3.95%	0.85%	1.74%	0.66%	0.39%	0.52%	0.34%	0.35%	0.27%	0.00%	0.02%	0.03%	0.01%	0.00%	<b>16.93%</b>
GRAPES	4.92%	1.63%	0.48%	1.07%	0.13%	0.08%	0.17%	0.08%	0.11%	0.08%	0.02%	0.00%	0.01%	0.00%	0.00%	<b>8.77%</b>
MANGOES	2.34%	1.04%	0.67%	0.66%	0.13%	0.09%	0.11%	0.05%	0.06%	0.04%	0.02%	0.01%	0.02%	0.00%	0.00%	<b>5.26%</b>
AVOCADOS	2.31%	0.67%	1.47%	0.11%	0.12%	0.05%	0.10%	0.01%	0.06%	0.03%	0.06%	0.00%	0.00%	0.00%	0.01%	<b>5.00%</b>
PEARS	2.00%	1.13%	0.20%	0.51%	0.18%	0.13%	0.15%	0.16%	0.08%	0.07%	0.00%	0.00%	0.01%	0.01%	0.00%	<b>4.64%</b>
ORANGES	2.04%	0.74%	0.49%	0.38%	0.10%	0.04%	0.10%	0.07%	0.07%	0.04%	0.01%	0.01%	0.00%	0.00%	0.00%	<b>4.09%</b>
NECTARINES	1.32%	0.72%	0.29%	0.42%	0.12%	0.15%	0.20%	0.15%	0.06%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>3.45%</b>
PLUMS	1.58%	0.69%	0.16%	0.53%	0.11%	0.10%	0.06%	0.13%	0.02%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>3.43%</b>
PEACHES	1.03%	0.55%	0.23%	0.49%	0.07%	0.13%	0.05%	0.11%	0.02%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>2.68%</b>
PINEAPPLES	1.22%	0.47%	0.44%	0.30%	0.04%	0.06%	0.07%	0.02%	0.02%	0.01%	0.02%	0.00%	0.01%	0.00%	0.00%	<b>2.66%</b>
WATERMELONS	1.10%	0.71%	0.33%	0.14%	0.01%	0.02%	0.12%	0.00%	0.04%	0.07%	0.01%	0.00%	0.01%	0.00%	0.01%	<b>2.55%</b>
LEMONS	0.95%	0.25%	0.30%	0.18%	0.02%	0.01%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.76%</b>
STRAWBERRIES	0.78%	0.38%	0.42%	0.06%	0.00%	0.00%	0.02%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.68%</b>
EXOTIC CITRUS	0.76%	0.38%	0.10%	0.35%	0.03%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.67%</b>
NAARTJIES	0.72%	0.07%	0.08%	0.03%	0.02%	0.00%	0.04%	0.04%	0.02%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.05%</b>
MUSKMELONS	0.68%	0.12%	0.07%	0.01%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.91%</b>
SWEET MELONS	0.56%	0.08%	0.20%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.87%</b>
PAPAYAS	0.53%	0.21%	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%	<b>0.80%</b>
KIWIFRUIT	0.31%	0.09%	0.08%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.52%</b>
OTHER FRUIT	2.11%	0.68%	0.66%	0.15%	0.01%	0.01%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>3.66%</b>
<b>TOTAL</b>	<b>44.02%</b>	<b>19.99%</b>	<b>11.99%</b>	<b>9.84%</b>	<b>2.72%</b>	<b>2.70%</b>	<b>2.66%</b>	<b>2.01%</b>	<b>1.49%</b>	<b>1.09%</b>	<b>1.02%</b>	<b>0.18%</b>	<b>0.16%</b>	<b>0.10%</b>	<b>0.03%</b>	<b>100%</b>

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	EL	BFN	PMB	KDP	WKM	PE	WBK	KIM	VER	GRJ	
BANANAS	10.84%	6.94%	4.68%	3.27%	1.25%	1.54%	1.08%	1.11%	0.84%	0.53%	0.83%	0.17%	0.07%	0.09%	0.00%	<b>33.26%</b>
APPLES	8.36%	4.14%	0.85%	2.23%	0.74%	0.37%	0.52%	0.42%	0.39%	0.31%	0.00%	0.02%	0.03%	0.02%	0.00%	<b>18.42%</b>
WATERMELONS	2.1%	1.75%	1.38%	0.34%	0.37%	0.25%	0.24%	0.00%	0.09%	0.16%	0.05%	0.00%	0.03%	0.00%	0.03%	<b>6.79%</b>
ORANGES	2.66%	1.23%	0.63%	0.66%	0.21%	0.07%	0.17%	0.16%	0.11%	0.07%	0.03%	0.01%	0.01%	0.01%	0.00%	<b>6.03%</b>
PEARS	2.23%	1.3%	0.25%	0.66%	0.23%	0.14%	0.18%	0.24%	0.13%	0.11%	0.01%	0.00%	0.01%	0.01%	0.00%	<b>5.48%</b>
MANGOES	1.7%	0.95%	0.52%	0.5%	0.12%	0.06%	0.1%	0.04%	0.05%	0.07%	0.03%	0.01%	0.02%	0.00%	0.00%	<b>4.16%</b>
GRAPES	2.24%	0.69%	0.22%	0.55%	0.06%	0.03%	0.12%	0.04%	0.04%	0.06%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>4.08%</b>
AVOCADOS	1.84%	0.54%	0.74%	0.07%	0.13%	0.02%	0.08%	0.02%	0.06%	0.04%	0.03%	0.01%	0.00%	0.00%	0.01%	<b>3.58%</b>
PLUMS	1.52%	0.57%	0.13%	0.58%	0.1%	0.08%	0.05%	0.15%	0.02%	0.03%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>3.23%</b>
LEMONS	1.42%	0.41%	0.55%	0.29%	0.05%	0.02%	0.03%	0.01%	0.01%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	<b>2.8%</b>
PINEAPPLES	1.14%	0.43%	0.38%	0.29%	0.03%	0.09%	0.05%	0.01%	0.01%	0.01%	0.03%	0.00%	0.01%	0.00%	0.00%	<b>2.48%</b>
EXOTIC CITRUS	0.83%	0.45%	0.16%	0.42%	0.04%	0.03%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.95%</b>
NECTARINES	0.61%	0.3%	0.17%	0.21%	0.06%	0.07%	0.1%	0.1%	0.03%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.65%</b>
PEACHES	0.6%	0.31%	0.13%	0.3%	0.04%	0.06%	0.03%	0.09%	0.01%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	<b>1.59%</b>
NAARTJIES	0.7%	0.07%	0.15%	0.05%	0.03%	0.00%	0.05%	0.07%	0.04%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.2%</b>
MUSKMELONS	0.35%	0.07%	0.05%	0.01%	0.00%	0.02%	0.01%	0.00%	0.00%	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	<b>0.64%</b>
SWEET MELONS	0.27%	0.04%	0.16%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.05%	<b>0.54%</b>
PAPAYAS	0.21%	0.06%	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%	<b>0.31%</b>
STRAWBERRIES	0.11%	0.07%	0.07%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.27%</b>
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%	<b>0.12%</b>
OTHER FRUITS	0.75%	0.29%	0.25%	0.06%	0.02%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.41%</b>
<b>TOTAL</b>	<b>40.54%</b>	<b>20.64%</b>	<b>11.51%</b>	<b>10.53%</b>	<b>3.48%</b>	<b>2.86%</b>	<b>2.82%</b>	<b>2.48%</b>	<b>1.84%</b>	<b>1.45%</b>	<b>1.2%</b>	<b>0.23%</b>	<b>0.19%</b>	<b>0.14%</b>	<b>0.1%</b>	<b>100%</b>

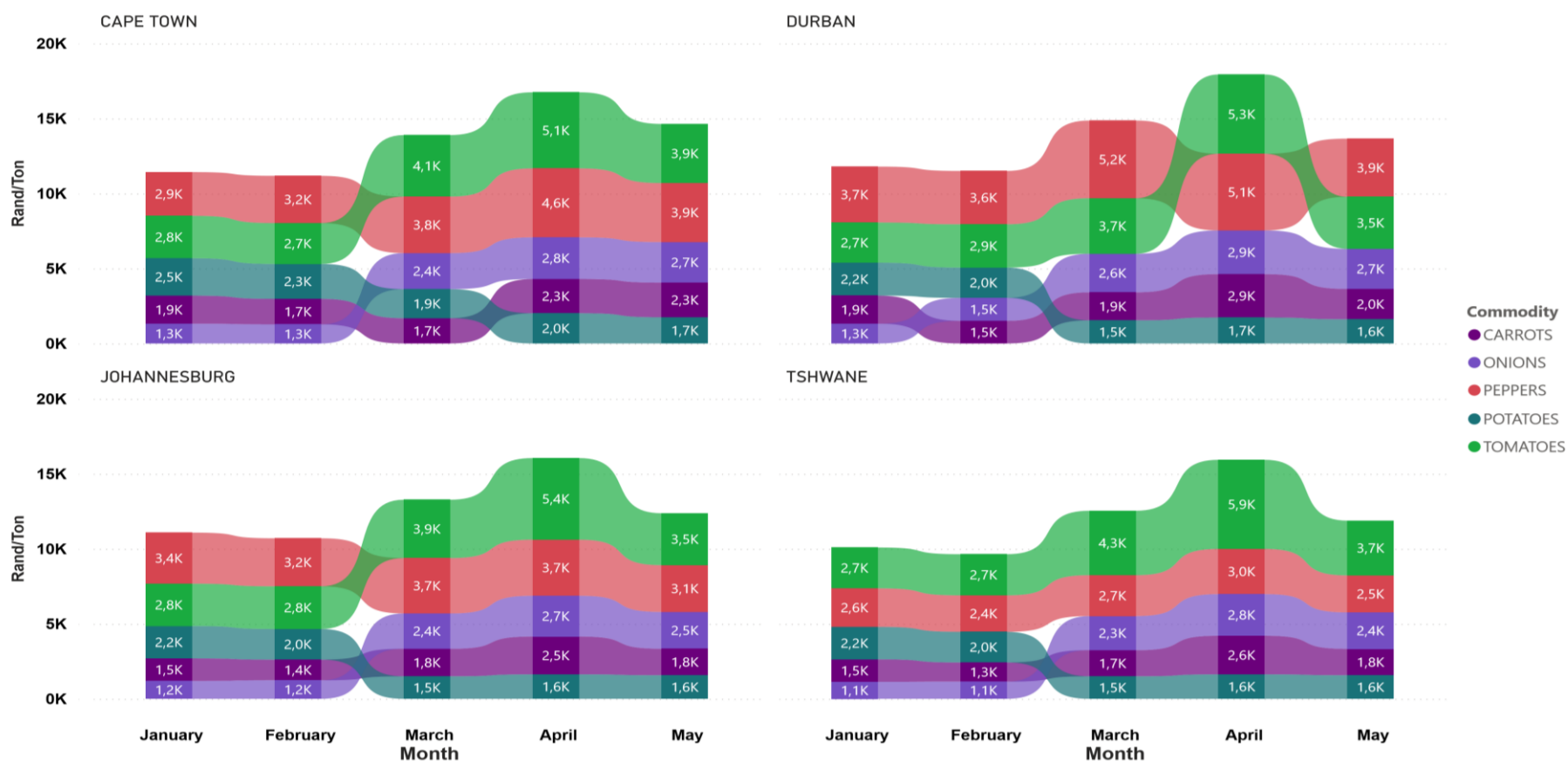
## 5. PRICES – JANUARY TO MAY 2024

**Figure 1** shows average fruit and vegetable prices in different categorised markets. Prices in top-performing markets are higher compared to aggregated small and medium markets. Moreover, the price fluctuation is higher in top markets than in other markets. The price of fruit appears to be more stable than that of vegetables.



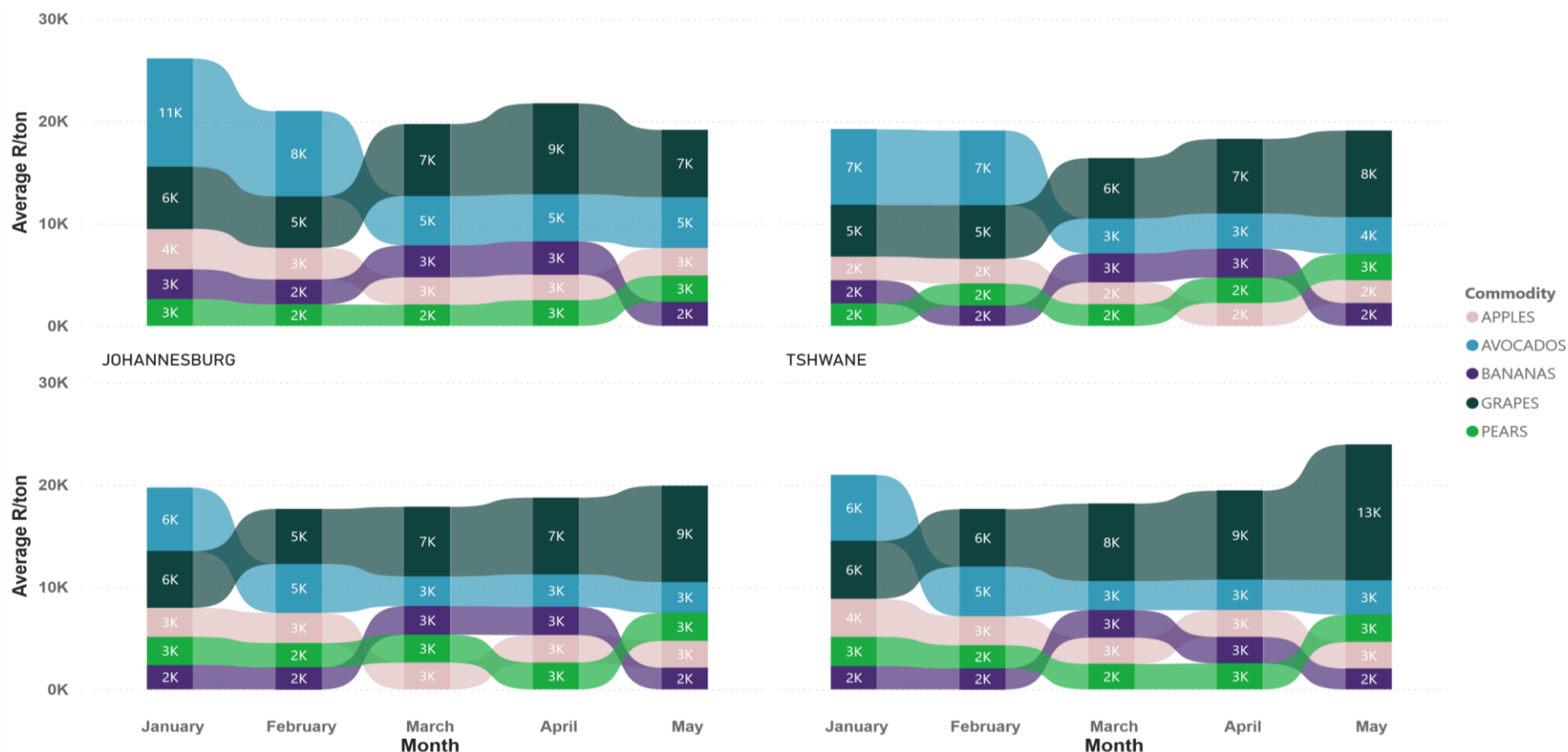
**Figure 1: Average fruits and vegetables prices in different categorised market**

**Figure 2** shows average vegetable prices in Cape Town, Durban, Joburg, and Tshwane. Tomato and peppers recorded the highest prices in Tshwane, Cape Town, and Johannesburg. Carrot prices steadily increased across all markets, especially in Durban and Johannesburg, indicating strong regional demand. Onion prices increased consistently from February to April before a slight decline in May, while pepper prices fluctuated significantly, with Durban seeing the highest increase from January to March. Potato prices remained relatively stable, though Cape Town, Durban, and Tshwane experienced significant decreases.



**Figure 2: Top five vegetables Price (R/ton) in top five markets**

**Figure 3** shows average fruit prices in Cape Town, Durban, Joburg, and Tshwane. Fruit prices generally decreased from January to March and slightly increased until May, with Durban maintaining stable prices. Avocado prices declined across all markets from January to April, particularly in Cape Town, before slightly rising in May. Banana prices showed moderate fluctuations, with a noticeable decrease in May, while grape prices were volatile but generally increased from March to May, with Cape Town leading this trend. Pear prices remained relatively stable with minor fluctuations, while Johannesburg and Tshwane consistently reported higher prices than other markets.



**Figure 3: Top five fruit prices (R/ton) in the top five markets**

## 6. CASE STUDY

In this case study, we purposively sample 13 vegetable farmers in Gauteng province. Due to data collection limitations, we are reporting on these farmers; however, this assessment does not imply that it represents the broad market access dynamics of South Africa. Instead, we aim to gain insight into what is happening regarding market access for fresh produce (vegetables) amongst smallholder farmers. Specifically, we look at what types of vegetables are produced and what quantity. We also asked farmers about the price they receive per commodity; however, some of this information was inconsistent due to poor record-keeping. In addition, we asked about the distance to the market since it directly affects their profitability. **Table 7** describes the collected data, which shows diverse demographic, production, and market access characteristics. The farmers' age ranges from 24 to 69 years, with an average age of 44.25. They produce an estimated quantity of 1 to 660 tons of vegetables, averaging 90.71 tons, and are located an average of 53.78 km from the nearest market. Revenue generated from fresh produce sales ranges from R3 000 to R250 000, with a mean of R89 250. The sample comprises six males and seven females.

**Table 7: Descriptive data**

Variable	N	Min	Max	Mean	Std
Age	13	24	69	44.25	15.88
Estimated quantity (tons)	7	1	660	90.71	229.77
Distance (km)	9	5	85	53.78	27.76
Cost (Rand)	7	3000	250000	89250	116805.55
Male	6	-	-	-	-
Female	7	-	-	-	-
Average number of vegetable commodities per farmer	3	-	-	-	-

### 6.1 Commodities

Each farmer cultivates an average of three different types of vegetables. Spinach emerges as the most cultivated vegetable, with a frequency of seven farmers growing it. This reflects its popularity, possibly due to its nutritional value and relatively straightforward cultivation requirements. Tomatoes are second, with six farmers producing them, highlighting their importance in local markets for fresh consumption and processing. This concurs with the SMAE since tomato is ranked second in the SMAE.

Cabbage is another significant crop five farmers grew, likely due to its durability and market demand. Two farmers each produce butternut and onion, demonstrating a moderate but



consistent presence among the surveyed farmers. The presence of various other vegetables, such as lemon, lettuce, chilli, sweet potato, jalapeno, beans, pepper, cucumber, coriander, Italian parsley, micro greens, and baby spinach, each with a frequency of one farmer, indicates a diversified farming approach. Farmers are exploring different crops in the top twenty in the fresh produce markets, with some ranked beyond the top twenty, which are niche markets. The ranking of tomatoes, cabbage, onion, butternut and peppers concurs with the SMAE since they fall within the top ten.

**Table 82: Frequency of vegetables per farmer**

Vegetable	Frequency
Spinach	7
Tomato	6
Cabbage	5
Butternut	2
Onion	2
Lemon	1
Lettuce	1
Shushu	1
Chili	1
Sweet potato	1
Jalapeno	1
Beans	1
Pepper	1
Cucumber	1
Coriander	1
Italian parsley	1
Microgreens	1
Baby spinach	1
Spinach	1
Sweet potatoes	1

## 6.2 Marketing channels

The sampled farmers have different marketing channels to sell their produce, including formal and informal markets. Fresh produce markets are popular, with several farmers selling their produce at the Joburg and Tshwane markets. In addition to fresh produce markets, many

farmers sell to butcheries through informal trading channels. This includes high-road butcheries and various informal traders, highlighting a reliance on more localized and potentially less regulated market options. Such channels often provide more immediate cash flow and direct sales opportunities, which can be crucial for smallholder farmers with limited resources. Hawkers are another significant market outlet frequently mentioned by farmers. Selling to hawkers represents an essential aspect of the informal economy, where produce can reach consumers directly and quickly. This method is particularly beneficial for perishable goods that must be sold swiftly to avoid spoilage. Formal retail channels, such as supermarkets and agents, also play a vital role in the farmers' market strategies.

Some farmers sell their produce to retailers. Given this market, they mentioned that they have a relationship that offers stable demand and potentially higher prices but may come with stringent quality and consistency requirements. In addition, street vendors are another layer of the informal market structure, providing a direct connection between farmers and end consumers. Selling through street vendors allows for flexible and immediate sales, catering to local demand and often requiring less logistical complexity. Home markets, referred to by one farmer as "homers," suggest direct sales to local consumers within the community. This approach fosters community support and reduces transportation costs and logistical hurdles.

### **6.3 Market Access Programs**

We also asked farmers if they currently participate in programs that help them access markets for fresh produce. Most farmers indicated that they do not participate in specific market access programs; however, several proactive measures were noted. Farmers are actively pursuing production training to improve agricultural practices, with support from the Khula enterprise. In addition, the Gauteng Department of Agriculture and Rural Development (GDARD) is also assisting them with obtaining crucial SA and GAP certifications. They also mentioned that their affiliation to a secondary cooperative helps them use a collective approach to meet specific marketing requirements such as transport and quantity.

### **6.4 Challenges**

Given these market dynamics, farmers identified several challenges in accessing markets for their fresh produce. These include logistical issues such as transportation and refrigeration, which impact product quality and availability. Economic challenges such as funding and cash flow were also noted, exacerbated by late payments. Pricing concerns pose another significant hurdle. Moreover, production obstacles stemming from climate change effects, such as unpredictable weather and hail damage, affect yield consistency and quality.

### **6.5 Interventions**

To address these challenges effectively, targeted interventions are crucial. Supporting infrastructure development, such as refrigerated storage and larger transport vehicles, can enhance logistical capabilities and maintain product quality. Financial interventions, including more accessible access to funding, letters of intent for financing, and support for cash flow

management, would alleviate economic pressures and ensure timely payments. Establishing market structures and off-taker agreements could stabilize pricing and create a more predictable market environment for farmers. Furthermore, interventions focusing on climate resilience, such as providing shade nets and supporting cultivation under cover, would mitigate production risks associated with climate change. Investing in agricultural inputs like fertilizers, quality seeds, equipment, and training in modern farming techniques would further bolster productivity and product quality.

## 7. CONCLUSION

The smallholder market access estimates for fruits and vegetables from February to May 2024 highlight significant revenue and volume fluctuations in the national fresh produce market. Total revenues ranged from R565 million to R630 million, with volumes between 74 477 and 80 980 tons. Market access remains concentrated in major markets such as Johannesburg, Tshwane, Cape Town, and Durban, limiting smallholder farmers' reach and exposing them to volatile market dynamics. Potatoes, tomatoes, onions, peppers, carrots, bananas, and apples dominate the market, with potatoes leading in revenue (38.81%) and volume (45.04%). Key markets accounted for 84.81% of the revenue, reflecting a need for strategic support to enhance smallholder farmers' access and competitiveness.

Vegetable prices exhibited consistent trends and geographic differences. Tomatoes and peppers were the highest-paying commodities in Tshwane, Cape Town, and Johannesburg. Carrot prices increased steadily across all markets, especially in Durban and Johannesburg. Onion prices increased from February to April, slightly declining in May, while pepper prices showed significant volatility, with Durban reporting the highest prices. Potato prices remained stable with minimal fluctuations. Fruit prices generally decreased from January to March and slightly increased up to May, with Durban maintaining price stability. A case study of 13 vegetable farmers in Gauteng province shows that farmers have diverse cultivation practices, production challenges, and market strategies. Challenges include accessing markets due to logistical issues like transportation and refrigeration, economic difficulties, including funding and late payments, pricing concerns, and production obstacles from climate change impacts such as unpredictable weather and hail damage. Effective infrastructure development, financial support, and climate resilience initiatives are essential to address these challenges and promote sustainable agricultural practices.

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