



## **SMALLHOLDER MARKET ACCESS ESTIMATES**

### **QUARTER 3 2024**

***National Agricultural  
Marketing Council***



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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

## 1. BACKGROUND

This report estimates smallholder market access at National Fresh Produce Markets (NFPMs) in South Africa from October 2024 to December 2024. The focus is on the volume of fresh produce supplied by smallholder farmers to these markets, 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

**Table 1** shows the total estimated income generated from fruits and vegetables in the various markets between October and December 2024. The smallholder market turnover decreased from approximately **R715 million** in October 2024 to **about R622 million** in December 2024, representing a decline of approximately 13% during this two-month period. The Fresh Produce Markets are characterized by significant concentration, with a few large markets dominating. During the third quarter of 2024, the Johannesburg market accounted for 45.4% of the total turnover, followed by Tshwane at 19.3%, Cape Town at 11.1%, and Durban at 8.6%. These four markets collectively represented 84.4% of the total turnover. The remaining markets, including Springs, East London, Bloemfontein, Klerksdorp, Welkom, Pietermaritzburg, Port Elizabeth, Witbank, Nelspruit, Vereeniging, George, and Kimberley, all contributed less than 5% of the total turnover. This distribution indicates a high level of market concentration, with a few large markets accounting the highest portion of revenue generated.

**Table 2** shows the total volume in tons supplied to the National Fresh Produce Markets by smallholder farmers between October and December 2024. The total SMAE tonnage decreased from **81 thousand tons** in October to **74 thousand tons** in November, followed by an increase to **79 thousand tons in December**. The four largest markets—Johannesburg, Tshwane, Cape Town, and Durban—collectively accounted for approximately 83.51% of the total market share during this period. Medium-sized markets—including Springs, Bloemfontein, Pietermaritzburg, Port Elizabeth, Klerksdorp, Welkom, and East London—collectively contributed approximately 15.33% to the total market share. Smaller markets, such as Witbank, Nelspruit, Vereeniging, George, and Kimberley, collectively accounted for the remaining 1.16% of the market share.

Table 1: Total estimated revenue generated from fruits and vegetables

MARKET	OCT 2024	NOV 2024	DEC 2024	%Δ (OCT-NOV) 2024	%Δ (NOV-DEC) 2024	MARKET SHARE
JOHANNESBURG	329 700 043	283 082 258	291 785 425	-14.1%	3.1%	45.4%
TSHWANE	139 218 577	120 866 449	125 237 881	-13.2%	3.6%	19.3%
CAPE TOWN	76 628 518	69 937 613	75 201 119	-8.7%	7.5%	11.1%
DURBAN	57 803 897	54 155 868	58 906 312	-6.3%	8.8%	8.6%
SPRINGS	22 431 476	19 038 175	19 452 322	-15.1%	2.2%	3.1%
EAST LONDON	17 709 556	14 997 880	19 650 003	-15.3%	31.0%	2.6%
BLOEMFONTEIN	18 746 277	16 865 285	18 507 023	-10.0%	9.7%	2.7%
KLERKSDORP	13 620 618	11 831 378	12 086 906	-13.1%	2.2%	1.9%
WELKOM	11 634 997	8 984 878	10 758 414	-22.8%	19.7%	1.6%
PIETERMARITZBURG	9 555 011	8 053 607	9 501 537	-15.7%	18.0%	1.4%
PORT ELIZABETH	10 206 597	8 002 980	8 834 119	-21.6%	10.4%	1.4%
WITBANK	1 928 470	1 499 152	1 635 125	-22.3%	9.1%	0.3%
NELSPRUIT	1 377 638	1 422 781	1 406 919	3.3%	-1.1%	0.2%
VEREENIGING	1 504 566	1 164 235	1 047 629	-22.6%	-10.0%	0.2%
GEORGE	1 590 364	1 126 681	1 004 174	-29.2%	-10.9%	0.2%
KIMBERLEY	1 174 087	773 862	826 890	-34.1%	6.9%	0.1%
<b>Grand Total</b>	<b>714 830 692</b>	<b>621 803 082</b>	<b>655 841 797</b>			

Table 2: Total estimated volume of fruits and vegetables

MARKET	OCT 2024	NOV 2024	DEC 2024	%Δ (OCT-NOV) 2024	%Δ (NOV-DEC) 2024	MARKET SHARE
JOHANNESBURG	37 067	33 177	35 395	-10.5%	6.7%	44.77%
TSHWANE	17 960	15 954	16 316	-11.2%	2.3%	21.29%
CAPE TOWN	7 071	6 861	7 505	-3.0%	9.4%	9.09%
DURBAN	6 703	6 549	6 475	-2.3%	-1.1%	8.36%
SPRINGS	2 861	2 738	2 847	-4.3%	4.0%	3.58%
BLOEMFONTEIN	2 101	1 941	2 143	-7.6%	10.4%	2.62%
EAST LONDON	1 832	1 657	2 301	-9.6%	38.8%	2.45%
KLERKSDORP	1 710	1 695	1 754	-0.9%	3.5%	2.19%
WELKOM	1 437	1 161	1 381	-19.2%	18.9%	1.69%
PIETERMARITZBURG	1 133	1 008	1 269	-11.0%	25.9%	1.45%
PORT ELIZABETH	1 081	985	1 138	-8.9%	15.5%	1.36%
WITBANK	252	227	250	-10.2%	10.0%	0.31%
VEREENIGING	203	184	189	-9.1%	2.6%	0.24%
NELSPRUIT	179	168	198	-6.3%	17.7%	0.23%
GEORGE	168	122	209	-27.4%	71.6%	0.21%
KIMBERLEY	167	114	121	-31.9%	6.5%	0.17%
<b>Grand Total</b>	<b>81 927</b>	<b>74 542</b>	<b>79 489</b>			

### 3. VEGETABLES – OCTOBER TO DECEMBER 2024

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 October to December 2024. 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 vegetable'. We aggregated the data within the period October to December 2024. **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 **R1.3 billion**. This revenue is further analysed to determine market share distribution per commodity and market.

The SMAE shows that potatoes dominate the market with a 43.08% share, followed by tomatoes at 15.86 % and onions at 10.19%. Peppers and carrots contribute 6.66% and 4.52%, respectively. These five vegetables collectively account for approximately 80.31% of the smallholder market access estimates (SMAE). 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 16.36%, while others constitute approximately 3.30%.

The SMAE is concentrated in four markets: Johannesburg (JHB), Tshwane (TSH), Cape Town (CPT), and Durban (DBN). Johannesburg leads with a 45.60% market share, followed by Tshwane (18.37%), Cape Town (10.56%), and Durban (8.67%). These four markets account for 83.2% of smallholder market access estimates, while the remaining 16.8% 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 64.25%, followed by Western Cape Province at 10.56%. 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 October to December 2024. The average SMAE for vegetables in volume, which is **182 thousand tons**, is presented in percentages to explain market share distribution per commodity and sales channel. Potatoes rank first, contributing 40.59% of the total volume, followed by onions at 16.71%. Tomatoes rank third at 10.46% followed by cabbage at 6.89% and carrots at 5.74%. Collectively, these five commodities represent 80.39% 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 47.31%, followed by Tshwane at 17.97% and then Cape Town and Durban at 8.60% respectively.

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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	BFN	EL	KDP	WLK	PMB	PE	WBK	GRG	VER	KIM	
POTATOES	17.93%	8.08%	3.42%	3.79%	2.20%	1.33%	1.39%	1.20%	1.09%	0.83%	0.77%	0.26%	0.15%	0.27%	0.11%	<b>43.08%</b>
TOMATOES	7.35%	2.47%	2.48%	1.17%	0.50%	0.52%	0.22%	0.42%	0.37%	0.08%	0.25%	0.01%	0.03%	0.00%	0.00%	<b>15.86%</b>
ONIONS	4.93%	1.82%	0.86%	1.19%	0.25%	0.16%	0.34%	0.13%	0.11%	0.15%	0.15%	0.03%	0.03%	0.01%	0.01%	<b>10.19%</b>
PEPPERS	3.53%	1.27%	0.97%	0.46%	0.07%	0.08%	0.12%	0.05%	0.02%	0.02%	0.05%	0.00%	0.00%	0.00%	0.00%	<b>6.66%</b>
CARROTS	1.99%	0.88%	0.33%	0.58%	0.09%	0.10%	0.27%	0.07%	0.03%	0.03%	0.13%	0.00%	0.01%	0.00%	0.01%	<b>4.52%</b>
CABBAGE	1.18%	0.59%	0.14%	0.23%	0.12%	0.14%	0.07%	0.13%	0.11%	0.01%	0.01%	0.01%	0.00%	0.00%	0.01%	<b>2.75%</b>
BUTTERNUT SQUASHES	1.05%	0.41%	0.26%	0.11%	0.02%	0.02%	0.08%	0.01%	0.01%	0.03%	0.02%	0.00%	0.01%	0.00%	0.00%	<b>2.02%</b>
LETTUCE	0.84%	0.38%	0.18%	0.24%	0.03%	0.04%	0.01%	0.00%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.75%</b>
BETROOT	0.82%	0.39%	0.07%	0.09%	0.04%	0.04%	0.05%	0.05%	0.02%	0.00%	0.03%	0.00%	0.00%	0.00%	0.00%	<b>1.62%</b>
ENGLISH CUCUMBERS	0.81%	0.32%	0.32%	0.00%	0.02%	0.04%	0.00%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.54%</b>
PUMPKINS	0.41%	0.15%	0.12%	0.01%	0.02%	0.08%	0.02%	0.04%	0.04%	0.00%	0.03%	0.00%	0.01%	0.00%	0.01%	<b>0.94%</b>
SWEET POTATOES	0.40%	0.17%	0.15%	0.02%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.77%</b>
GREEN BEANS	0.37%	0.17%	0.13%	0.03%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.73%</b>
CHILLIES	0.40%	0.14%	0.07%	0.07%	0.01%	0.01%	0.00%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.73%</b>
SWEETCORN	0.41%	0.12%	0.10%	0.04%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.68%</b>
GARLIC	0.39%	0.10%	0.08%	0.05%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.66%</b>
BROCCOLI	0.40%	0.13%	0.07%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.61%</b>
CAULIFLOWER	0.34%	0.08%	0.10%	0.05%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.59%</b>
GINGER	0.29%	0.08%	0.08%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.49%</b>
HUBBARD SQUASHES	0.28%	0.13%	0.00%	0.00%	0.03%	0.01%	0.00%	0.01%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.48%</b>
OTHER	1.47%	0.50%	0.62%	0.52%	0.03%	0.04%	0.02%	0.03%	0.01%	0.02%	0.03%	0.00%	0.00%	0.00%	0.00%	<b>3.30%</b>
<b>Grand Total</b>	<b>45.60%</b>	<b>18.37%</b>	<b>10.56%</b>	<b>8.67%</b>	<b>3.47%</b>	<b>2.64%</b>	<b>2.60%</b>	<b>2.17%</b>	<b>1.84%</b>	<b>1.21%</b>	<b>1.50%</b>	<b>0.33%</b>	<b>0.26%</b>	<b>0.28%</b>	<b>0.16%</b>	<b>100%</b>



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

COMMODITY	MARKET															TOTAL
	JHB	TSH	CPT	DBN	SPR	BLFN	EL	KDP	WKM	PMB	PE	WBK	GRG	VER	KIM	
POTATOES	18.34%	5.39%	3.36%	3.76%	2.34%	1.28%	1.22%	1.23%	1.07%	0.85%	0.75%	0.25%	0.13%	0.29%	0.11%	40.59%
TOMATOES	5.00%	1.66%	1.44%	0.78%	0.35%	0.29%	0.17%	0.30%	0.23%	0.06%	0.15%	0.01%	0.02%	0.00%	0.00%	10.46%
ONIONS	8.41%	3.19%	1.09%	1.77%	0.45%	0.26%	0.49%	0.25%	0.17%	0.26%	0.20%	0.04%	0.04%	0.01%	0.02%	16.71%
PEPPERS	1.58%	0.77%	0.35%	0.18%	0.04%	0.03%	0.04%	0.03%	0.01%	0.01%	0.02%	0.00%	0.00%	0.00%	0.00%	3.06%
CARROTS	2.65%	1.08%	0.45%	0.71%	0.12%	0.13%	0.26%	0.09%	0.05%	0.03%	0.14%	0.01%	0.01%	0.00%	0.01%	5.74%
CABBAGE	2.81%	2.26%	0.25%	0.45%	0.31%	0.24%	0.14%	0.20%	0.12%	0.03%	0.03%	0.02%	0.00%	0.00%	0.03%	6.89%
BUTTERNUT SQUASHES	1.95%	0.74%	0.36%	0.15%	0.04%	0.03%	0.07%	0.02%	0.02%	0.04%	0.02%	0.00%	0.01%	0.00%	0.00%	3.43%
LETTUCE	0.43%	0.22%	0.10%	0.22%	0.03%	0.04%	0.00%	0.00%	0.00%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	1.06%
BEETROOT	1.23%	0.51%	0.07%	0.11%	0.06%	0.05%	0.05%	0.05%	0.04%	0.01%	0.03%	0.00%	0.00%	0.00%	0.00%	2.22%
ENGLISH CUCUMBERS	0.57%	0.18%	0.22%	0.00%	0.02%	0.02%	0.00%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.02%
PUMPKINS	1.50%	0.48%	0.20%	0.03%	0.06%	0.17%	0.03%	0.13%	0.10%	0.01%	0.05%	0.01%	0.01%	0.01%	0.01%	2.80%
SWEET POTATOES	0.34%	0.16%	0.19%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.76%
GREEN BEANS	0.16%	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%	0.37%
CHILLIES	0.19%	0.09%	0.02%	0.05%	0.00%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.37%
SWEETCORN	0.06%	0.04%	0.03%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.16%
GARLIC	0.06%	0.02%	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%	0.10%
BROCCOLI	0.11%	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%	0.00%	0.18%
CAULIFLOWER	0.07%	0.03%	0.08%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.21%
GINGER	0.05%	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%	0.00%	0.08%
HUBBARD SQUASHES	0.78%	0.39%	0.00%	0.01%	0.09%	0.02%	0.00%	0.03%	0.04%	0.00%	0.00%	0.01%	0.00%	0.01%	0.00%	1.37%
OTHER	1.01%	0.56%	0.30%	0.32%	0.05%	0.03%	0.02%	0.02%	0.01%	0.02%	0.02%	0.01%	0.00%	0.00%	0.00%	2.39%
<b>Grand Total</b>	<b>47.31%</b>	<b>17.97%</b>	<b>8.60%</b>	<b>8.60%</b>	<b>4.00%</b>	<b>2.59%</b>	<b>2.50%</b>	<b>2.38%</b>	<b>1.87%</b>	<b>1.34%</b>	<b>1.44%</b>	<b>0.37%</b>	<b>0.22%</b>	<b>0.33%</b>	<b>0.19%</b>	<b>100%</b>

#### 4. FRUITS – OCTOBER TO DECEMBER 2024

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 different 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 October to December 2024. The average SMAE for fruits in terms of revenue **R695 million**, is presented in percentages to explain distribution per market and commodity.

Bananas and apples dominate the fruit market, accounting for 26.09% and 17.18% of the SMAE, respectively. This is followed by watermelons, avocados and grapes which hold market shares of approximately 8.32%, 5.01%, and 4.52% respectively. These top five fruit commodities collectively contribute to 61.12% of the SMAEs in terms of market share. Meanwhile, fruits ranked sixth to twentieth, holding a 34.70% market share by volume, while other fruits only account for 4.18%.

Johannesburg emerges as the leading market with a 45.02% market share, followed by Tshwane with 21.14%, Cape Town with 12.19%, and Durban with 8.40%. These four markets contribute 86.75% of the SMAE, while others account for 13.25%. 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 based, favouring larger players. Cross-shareholding, specialization by commodity, and economies of scale further entrench the market power of dominant agents as indicated by 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, which is **54 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 volumes, contribute 26.82% and 22.98%, respectively. Apples follow them at 17.40%, mangoes at 3.63%, and lemons at 3.52%. Collectively, these fruits contribute 74.35% of the SMAEs in terms of volume. Meanwhile, fruits ranked sixth to twentieth, holding a 24% market share by volume, while other fruits only account for 1.66%. 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	BFN	EL	KDP	WKM	PMB	PE	WBK	GRG	VER	KIM	
<b>BANANAS</b>	8.95%	5.39%	3.75%	2.23%	0.88%	0.86%	1.59%	0.48%	0.35%	0.68%	0.85%	0.08%	0.00%	0.00%	0.01%	<b>26.09%</b>
<b>APPLES</b>	8.00%	3.81%	0.99%	1.53%	0.74%	0.53%	0.45%	0.36%	0.32%	0.37%	0.00%	0.01%	0.00%	0.00%	0.03%	<b>17.18%</b>
<b>WATERMELONS</b>	3.37%	3.22%	0.69%	0.26%	0.08%	0.32%	0.02%	0.14%	0.15%	0.03%	0.01%	0.01%	0.00%	0.00%	0.02%	<b>8.32%</b>
<b>AVOCADOS</b>	2.69%	0.65%	1.21%	0.13%	0.05%	0.10%	0.05%	0.04%	0.02%	0.02%	0.06%	0.00%	0.01%	0.00%	0.00%	<b>5.01%</b>
<b>GRAPES</b>	2.59%	0.80%	0.36%	0.47%	0.04%	0.12%	0.05%	0.04%	0.03%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>4.52%</b>
<b>NECTARINES</b>	2.11%	0.81%	0.63%	0.43%	0.08%	0.18%	0.09%	0.04%	0.03%	0.10%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>4.50%</b>
<b>MANGOES</b>	1.52%	0.81%	0.61%	0.52%	0.08%	0.13%	0.08%	0.07%	0.06%	0.06%	0.03%	0.01%	0.01%	0.00%	0.02%	<b>4.00%</b>
<b>PEARS</b>	1.65%	0.92%	0.18%	0.30%	0.12%	0.15%	0.10%	0.06%	0.06%	0.10%	0.00%	0.00%	0.00%	0.00%	0.01%	<b>3.65%</b>
<b>PINEAPPLES</b>	1.57%	0.62%	0.52%	0.33%	0.05%	0.09%	0.06%	0.03%	0.02%	0.03%	0.01%	0.00%	0.00%	0.00%	0.01%	<b>3.34%</b>
<b>PEACHES</b>	1.62%	0.71%	0.33%	0.40%	0.03%	0.04%	0.09%	0.01%	0.01%	0.09%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>3.34%</b>
<b>STRAWBERRIES</b>	1.47%	0.56%	0.45%	0.31%	0.02%	0.04%	0.01%	0.00%	0.01%	0.00%	0.05%	0.00%	0.00%	0.00%	0.00%	<b>2.93%</b>
<b>LEMONS</b>	1.16%	0.32%	0.37%	0.23%	0.03%	0.02%	0.01%	0.01%	0.00%	0.01%	0.02%	0.00%	0.00%	0.00%	0.00%	<b>2.18%</b>
<b>ORANGES</b>	1.07%	0.28%	0.38%	0.19%	0.01%	0.01%	0.00%	0.00%	0.00%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.97%</b>
<b>CHERRIES</b>	1.08%	0.32%	0.17%	0.21%	0.02%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.84%</b>
<b>NAARTJIES</b>	1.15%	0.16%	0.05%	0.11%	0.04%	0.02%	0.01%	0.03%	0.01%	0.05%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.63%</b>
<b>PLUMS</b>	0.64%	0.24%	0.13%	0.18%	0.02%	0.02%	0.03%	0.01%	0.01%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.30%</b>
<b>MUSKMELONS</b>	0.82%	0.15%	0.04%	0.04%	0.00%	0.01%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.09%</b>
<b>SWEET MELONS</b>	0.56%	0.08%	0.32%	0.03%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.00%</b>
<b>LITCHIS</b>	0.54%	0.24%	0.13%	0.06%	0.01%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.99%</b>
<b>PAPAYAS</b>	0.55%	0.24%	0.06%	0.03%	0.01%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.93%</b>
<b>OTHER</b>	1.91%	0.81%	0.83%	0.39%	0.01%	0.17%	0.02%	0.02%	0.01%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>4.18%</b>
<b>Grand Total</b>	<b>45.02%</b>	<b>21.14%</b>	<b>12.19%</b>	<b>8.40%</b>	<b>2.29%</b>	<b>2.85%</b>	<b>2.67%</b>	<b>1.34%</b>	<b>1.08%</b>	<b>1.65%</b>	<b>1.09%</b>	<b>0.11%</b>	<b>0.04%</b>	<b>0.00%</b>	<b>0.11%</b>	<b>100%</b>

Table 6: 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	
<b>BANANAS</b>	8.95%	6.11%	3.23%	2.57%	0.97%	0.87%	1.55%	0.59%	0.36%	0.73%	0.77%	0.08%	0.00%	0.00%	0.01%	<b>26.82%</b>
<b>WATERMELON</b>	8.18%	9.16%	2.56%	0.93%	0.24%	0.71%	0.03%	0.38%	0.26%	0.10%	0.19%	0.04%	0.16%	0.00%	0.05%	<b>22.98%</b>
<b>APPLES</b>	7.79%	3.75%	1.06%	1.70%	0.74%	0.54%	0.45%	0.46%	0.38%	0.46%	0.00%	0.00%	0.00%	0.00%	0.04%	<b>17.40%</b>
<b>MANGOES</b>	1.20%	1.01%	0.48%	0.45%	0.08%	0.12%	0.05%	0.07%	0.06%	0.06%	0.03%	0.01%	0.01%	0.00%	0.02%	<b>3.63%</b>
<b>LEMONS</b>	1.75%	0.51%	0.73%	0.31%	0.06%	0.02%	0.03%	0.01%	0.00%	0.03%	0.06%	0.00%	0.00%	0.00%	0.00%	<b>3.52%</b>
<b>PINEAPPLES</b>	1.69%	0.63%	0.42%	0.35%	0.05%	0.07%	0.11%	0.02%	0.02%	0.02%	0.02%	0.00%	0.00%	0.00%	0.01%	<b>3.44%</b>
<b>PEARS</b>	1.46%	0.85%	0.18%	0.30%	0.11%	0.15%	0.09%	0.08%	0.07%	0.12%	0.00%	0.00%	0.00%	0.00%	0.01%	<b>3.42%</b>
<b>AVOCADOS</b>	1.26%	0.36%	0.49%	0.07%	0.04%	0.07%	0.02%	0.03%	0.02%	0.03%	0.03%	0.00%	0.01%	0.00%	0.00%	<b>2.42%</b>
<b>NECTARINES</b>	1.10%	0.37%	0.42%	0.25%	0.04%	0.09%	0.05%	0.01%	0.01%	0.07%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>2.41%</b>
<b>ORANGES</b>	1.15%	0.33%	0.44%	0.28%	0.03%	0.02%	0.00%	0.00%	0.00%	0.03%	0.03%	0.00%	0.00%	0.00%	0.00%	<b>2.31%</b>
<b>PEACHES</b>	0.91%	0.29%	0.21%	0.24%	0.02%	0.03%	0.07%	0.00%	0.01%	0.09%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>1.88%</b>
<b>NAARTJIES (M)</b>	1.01%	0.19%	0.05%	0.14%	0.05%	0.03%	0.01%	0.04%	0.03%	0.08%	0.02%	0.00%	0.00%	0.00%	0.00%	<b>1.65%</b>
<b>GRAPES</b>	0.78%	0.25%	0.13%	0.15%	0.03%	0.07%	0.02%	0.01%	0.02%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.46%</b>
<b>PLUMS</b>	0.56%	0.18%	0.08%	0.15%	0.02%	0.02%	0.02%	0.00%	0.01%	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.08%</b>
<b>MUSKMELONS</b>	0.59%	0.14%	0.03%	0.05%	0.00%	0.01%	0.00%	0.02%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.85%</b>
<b>STRAWBERRIES</b>	0.35%	0.21%	0.13%	0.08%	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.79%</b>
<b>SWEET MELONS</b>	0.37%	0.05%	0.32%	0.02%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.78%</b>
<b>PAPAYAS</b>	0.44%	0.13%	0.06%	0.02%	0.01%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.68%</b>
<b>APRICOTS</b>	0.20%	0.10%	0.11%	0.03%	0.01%	0.02%	0.01%	0.01%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.49%</b>
<b>EXOTIC CITRUS</b>	0.01%	0.12%	0.10%	0.05%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.01%	0.00%	0.00%	0.00%	0.00%	<b>0.31%</b>
<b>OTHER</b>	0.72%	0.39%	0.24%	0.16%	0.01%	0.12%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	<b>1.66%</b>
<b>Grand Total</b>	<b>40.47%</b>	<b>25.12%</b>	<b>11.46%</b>	<b>8.30%</b>	<b>2.51%</b>	<b>2.97%</b>	<b>2.54%</b>	<b>1.74%</b>	<b>1.25%</b>	<b>1.90%</b>	<b>1.20%</b>	<b>0.14%</b>	<b>0.19%</b>	<b>0.00%</b>	<b>0.14%</b>	<b>100 %</b>

## 5. AVERAGE PRICES OF SELECTED FRUITS AND VEGETABLES

**Figure 1** illustrates significant price fluctuations for selected fruits and vegetables between October and December 2024. Increased consumer demand during the festive season likely contributed to these price changes. For instance, onion prices surged in November, followed by a sharp decline in December, potentially due to increased supply. Similarly, fruit prices such as apples and bananas saw an initial increase, likely driven by festive season consumption, followed by subsequent price decreases. In contrast, avocado prices demonstrated consistent growth throughout the period, likely due to steady consumer demand and limited seasonal supply fluctuations.

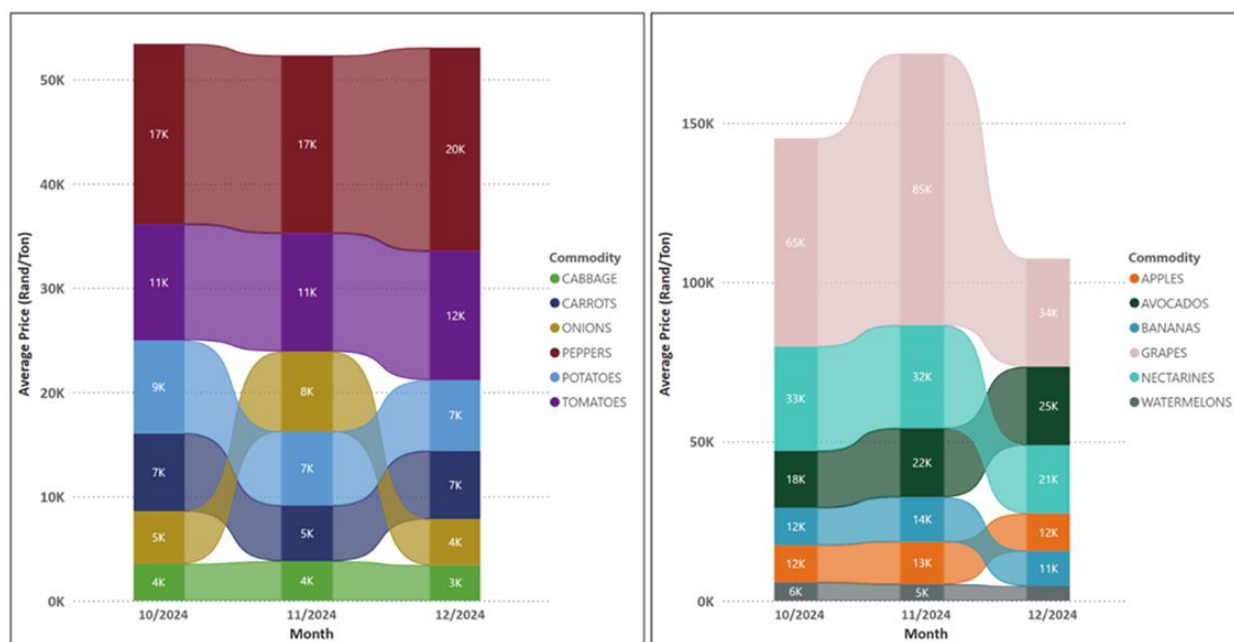



Figure 1: Average Prices (Rand/Ton) for selected fruits and vegetables

## 6. CONCLUSION

The smallholder market access estimates (SMAEs) for fruits and vegetables from October to December 2024 reveal notable fluctuations in both revenue and volume. The total revenue from smallholder farmers decreased from R715 million in October to R622 million in December, reflecting a 13% decline over the two-month period. Despite this decrease, the fresh produce market remains highly concentrated, with the four largest markets—Johannesburg, Tshwane, Cape Town, and Durban—accounting for 84.4% of the total turnover. These markets represent the primary destinations for smallholder farmers, consolidating the dominance of these major markets.

In the vegetable supply, potatoes, tomatoes, and onions continue to dominate the market in terms of both revenue and volume, contributing 80.31% of the SMAE revenue. The high concentration of market share in these top commodities raises concerns about limited market access for farmers growing other vegetables. Market share is concentrated further in the four largest markets, which together account for 83.2% of the



smallholder vegetable market. Similarly, in the fruit supply, bananas and apples dominate the market, accounting for 26.09% and 17.18% of the SMAE revenue, respectively. These two fruits, along with watermelons, avocados, and grapes, make up 61.09% of the total fruit market share. Market concentration is again evident, with the top four markets (Johannesburg, Tshwane, Cape Town, and Durban) accounting for 86.75% of the fruit SMAE. The continued dominance of these four markets highlights the need for improved access and diversification of the fruit offerings for smallholder farmers.

The analysis of price trends between October and December 2024 demonstrates significant fluctuations, particularly for onions, apples, and bananas, with price changes driven by festive season demand and subsequent supply adjustments. Avocado prices showed steady increase, while other fruits and vegetables experienced more volatile price trends. These price dynamics, along with the ongoing concentration in a few large markets, indicate a need for strategies to enhance market access and reduce dependence on major markets.

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