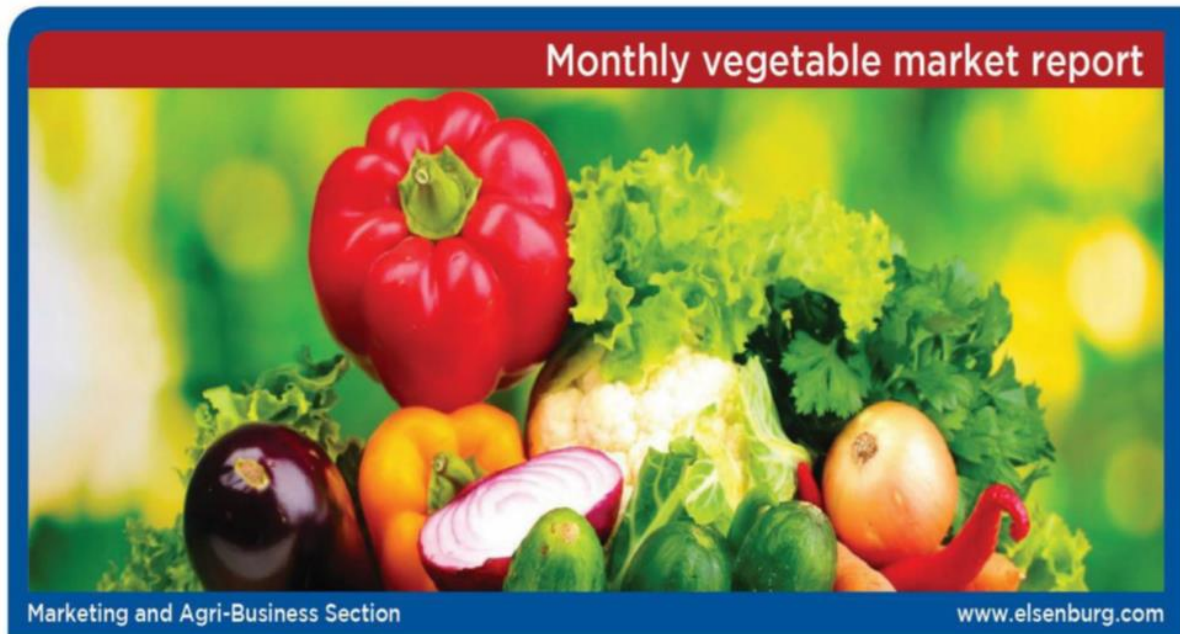


MONTHLY VEGETABLE REPORT



Review period: 01 July 2021 to 01 July 2022

MONTHLY MARKET INFORMATION REPORT: VEGETABLES

Issue: 2022/07

INTRODUCTION

The Cape Town Fresh produce market monthly report aims to bring forth information about the performance of selected vegetable sales in the market during the period under review. At a given month the report looks at the main commodities that are traded in the Cape Town fresh produce market in terms of average volume (tons) and prices (Rand per ton). The report also looks into international and local issues that affect the fresh produce industry.

OVERVIEW OF THE NATIONAL AGRICULTURAL MARKETING INFORMATION SYSTEM (AMIS), OFFERED BY THE DEPARTMENT OF AGRICULTURE, FORESTRY AND FISHERIES (DAFF)

The Agricultural Marketing Information Systems (AMIS) is a database interface offered by the Department of Agriculture, Forestry and Fisheries (DAFF).

The main purpose of the Agricultural Marketing Information System (AMIS) is to provide reliable & updated information to farmers. In order to assist farmers to plan activities relating to production and marketing in a much-informed manner.

Agricultural market information is provided for horticulture, field crops, livestock and industrial products, and includes the following categories:

- marketing prices,
- grading and standard information,
- annual price trends, and
- marketing news (pertaining to the application procedures for import and export permits).

Click on the following website link to access the [DAFF AMIS](#) web application, or alternatively go to the web address: <http://webapps.daff.gov.za/amis> (no subscription fee payable to access system). Cell phone user can send an SMS to ***120*4040#** (charged at standard SMS rates)

Please note that prices are updated at 12h00 a.m on a daily basis.

Vegetable price and volume trend analysis

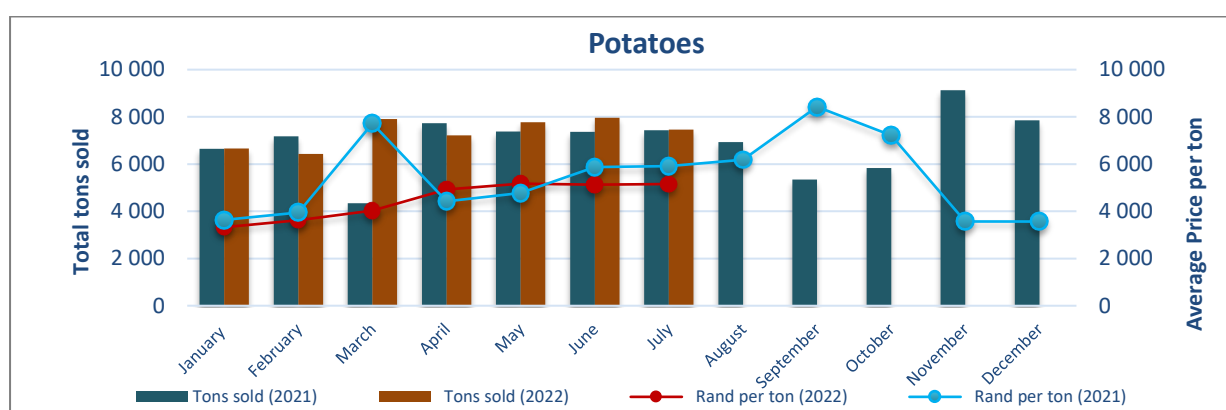
Vegetables are part of important annual crops for the South African agricultural industry. They play a fundamental role in contributing to various agricultural industries who are directly and indirectly involved in the vegetable industry. In return these industries make a significant contribution to employment creation and revenue generation in the Western Cape. At the fresh produce markets trade occurs on the market floors and market forces (i.e. demand and supply) determine prices of vegetables and fruits. The performance of the vegetable industry is largely dependent on climatic conditions and this impact on crop production. This occurs throughout all stages of production until the produce is harvested and ready for the market. Forming part of these climatic conditions is; drought, flood, hail and heat wave. In analyzing the price and volume of traded commodities, factors that impact on crops development and production are taken into consideration. Below are different figures of the main vegetables that are traded in the market in terms of prices and volumes.

1. Potatoes



As illustrated in the figure 1, the volume of potatoes sold at the Cape Town Fresh produce market during the month of July 2022, decreased slightly by 6.4% from 7961.7 tons in June 2022 to 7 453.2 tons. This translates to (508.5) ton decrease in the tons of potatoes sold at Cape Town Fresh produce market during the month of July 2022. Subsequently, the average market price per ton of potatoes sold increased by 0.4% (or R19.1) from R5133.3 in June 2022 to R5 152.3 in July 2022. Sales on the Cape Town market average market prices traded at 12.8% y/y per ton lower than the same period last year. The volume of potatoes traded on the other hand, recorded 0.2% y/y higher than the same period last year.

Figure 1: Potato prices and quantity traded at Cape Town Fresh Produce market



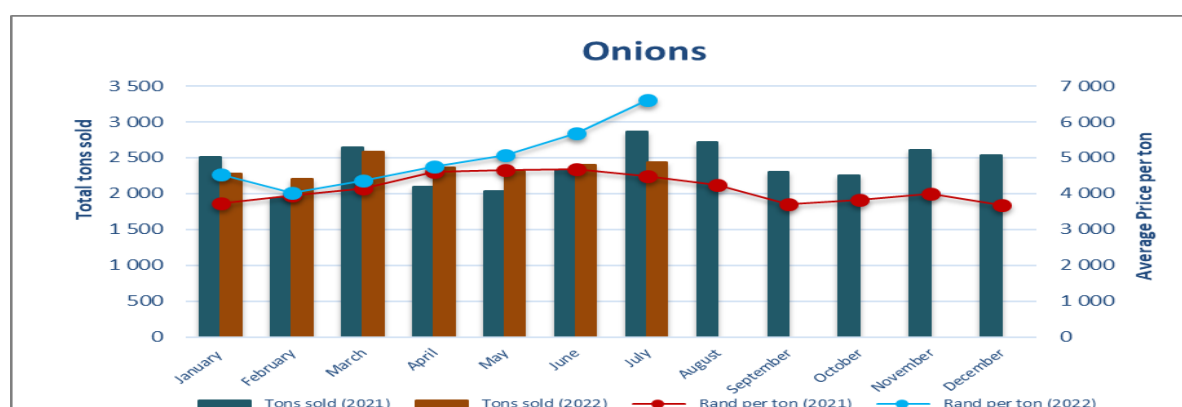
Source: Techno fresh (2022)

2. Onions



In July (2022) the volume of onions traded in the Cape Town fresh produce market was 2 442.5 tons which shows 2% increase from 2395.1 tons that was recorded in June 2022. Price per ton of onions sold on the market also showed 16.5% increase from R5672.3 in June 2022 to R6 608.4 in July 2022.

Figure 2: Onions prices and quantity traded at Cape Town Fresh Produce market



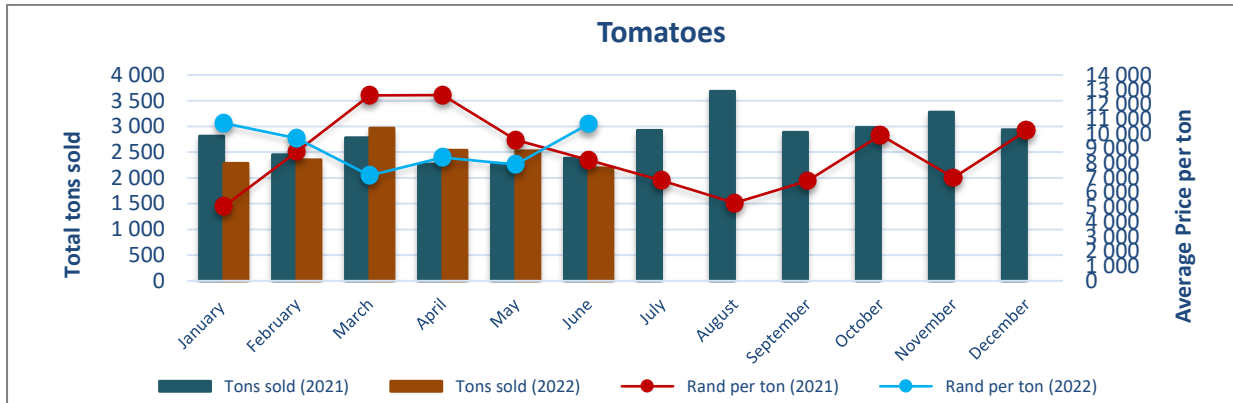
Source: Techno fresh (2022)

3. Tomatoes



The total amount of tomatoes sold during July 2022 was 2427 tons, which shows (226.8-ton) increase from 2200.2 tons recorded in June 2022. This translates into a month-to-month increase of 10% between June 2022 and July 2022.

Figure 3: Tomatoes sales on the Cape Town Fresh Produce Market



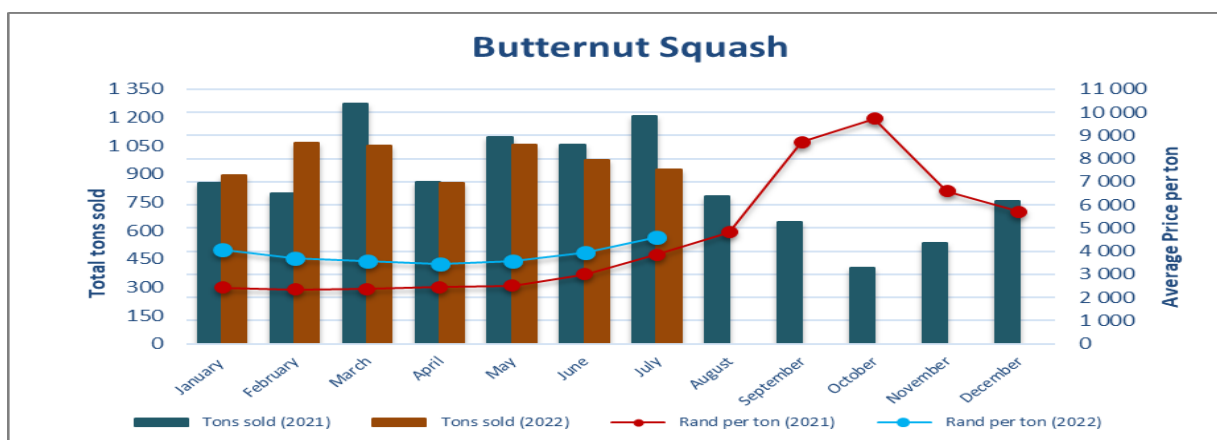
Source: Techno fresh (2022)

4. Butternut Squash



Figure 4 below represents the volume of butternut squash sold at the Cape Town fresh produce market during the month of July 2022. The volume of butternut squash sold decreased by 5.2% from 971.9 tons in June 2022 to 921.4 in July 2022. The price per ton of butternut on the other hand, increased by 16.3% from R3957.2 in June 2022 to R4 602.8 in July 2022. On a year to year basis the quantity of butternut squash sold during July 2021 and July 2022 decreased by 23.7% followed by an increase of 19.2% in the price of butternut during the same time period(2021/22).

Figure 4: Butternut squash sales on the Cape Town Fresh Produce Market



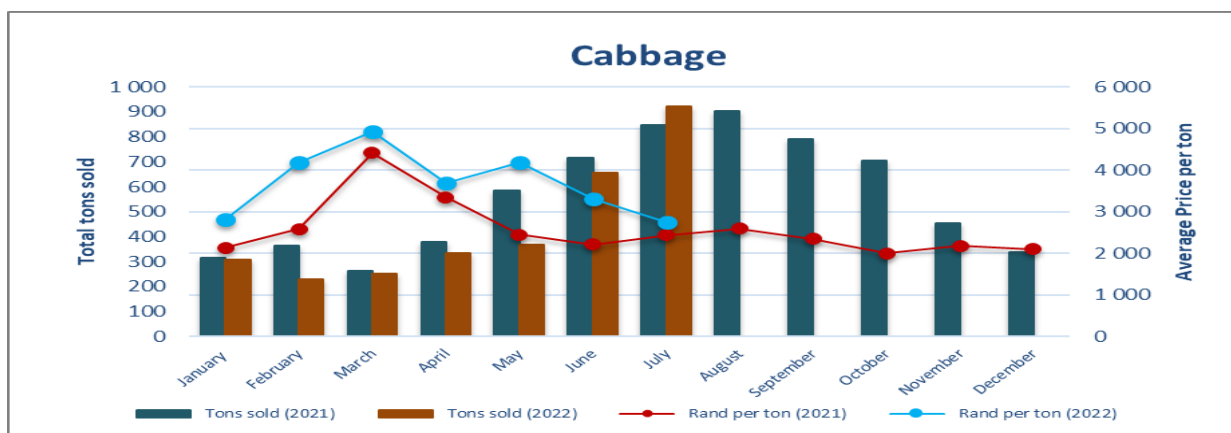
Source: Techno fresh (2022)

5. Cabbages



The total volume of cabbages sold at the Cape Town fresh produce market during July 2022 recorded a month-to-month increase of 40.4 % or 264.9 tons. The total volume of cabbages sold therefore increased from 655.3 tons in June 2022 to 920.2 tons in July 2022. The average market price per ton of cabbages on the other hand decreased by 16.8% from R3306 in June 2022 to R 2 750.2 in July 2022. On annual basis, the total volume of cabbages sold increased from 845.8 tons obtained in July 2021 to R920.2 tons obtained in July 2022. This represents a year-on-year increase of 8.8%, which is 264.9 tons, more than the amount registered within the same period last year.

Figure 5: Cabbages sales on the Cape Town Fresh Produce Market



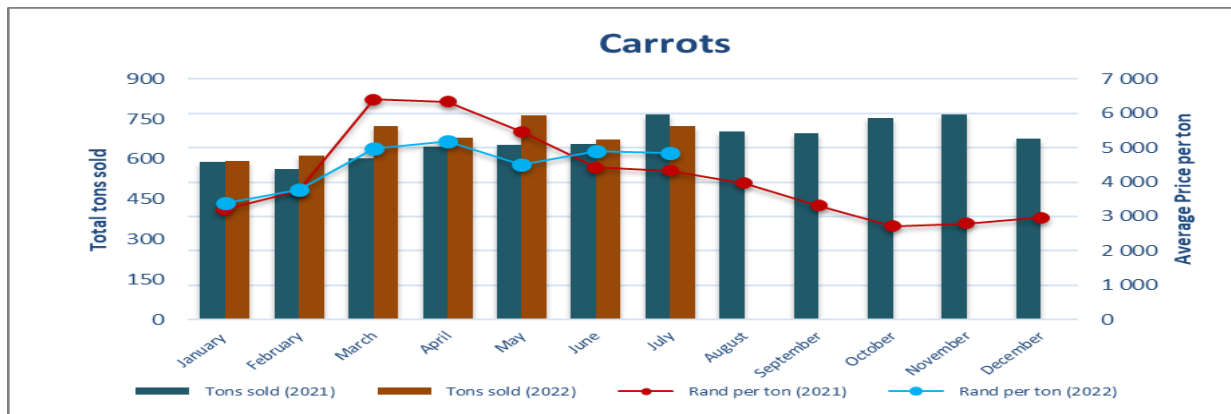
Source: Techno fresh (2022)

6. Carrots



As indicated by Figure 5 below shows the total volume of carrots traded at Cape Town fresh produce market during July 2022. The volume of carrots In July 2022 increased month-month by 7.4% from 675 tons in June 2022 to 725.2 in July 2022. When comparing year-on-year, the amount of carrots traded during this period decreased slightly by 5.3% from 766.1 tons in July 2021 to 725.2 tons in July 2022. In July 2022 carrots was trading at R 4 842.5 per ton, which indicates 1.3% decline in price per ton of carrots between June 2022 and July 2022. The average market price per ton of carrots increased by 11.8% % from R 4 330.1 in July 2021 to R4842.5 in July 2022.

Figure 6: Carrots sales on the Cape Town Fresh Produce Market



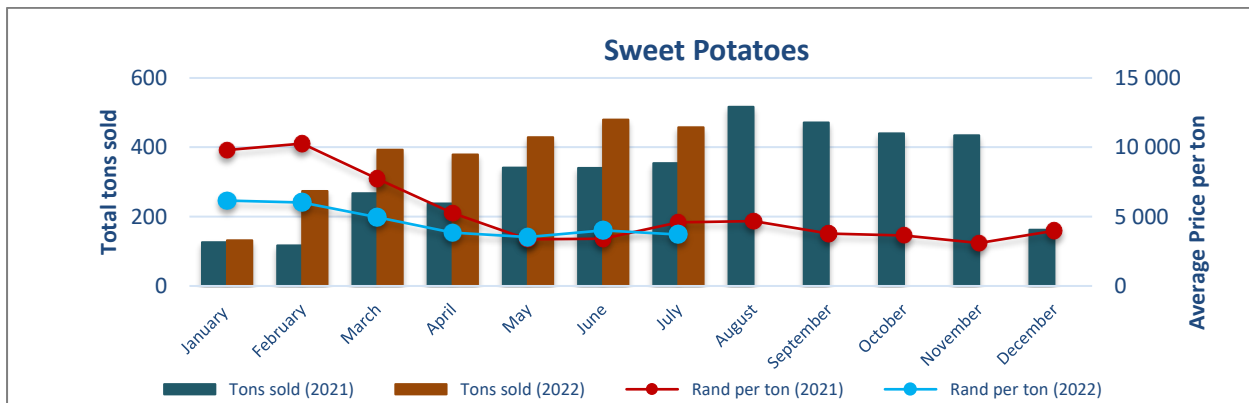
Source: Techno fresh (2022)

7. Sweet potato



The total volume of sweet potatoes sold at the Cape Town fresh produce market decreased from 479.8 in June 2022 to 457.9 in July 2022. This translates to 4.6% month-to-month decrease recorded during the month of July 2022. The total volume of sweet potatoes sold increased year-on-year by 29.1% from 354.6 tons in July 2021 to 457.9 tons in July 2022. Sweet potatoes were trading at R3 698.0 during July 2022. On annual basis, the average market price per ton decreased by 19.5% from R4 594.0 in July 2021 to R3 698.0 in July 2022.

Figure 7: Sweet potato sales on the Cape Town Fresh Produce Market.



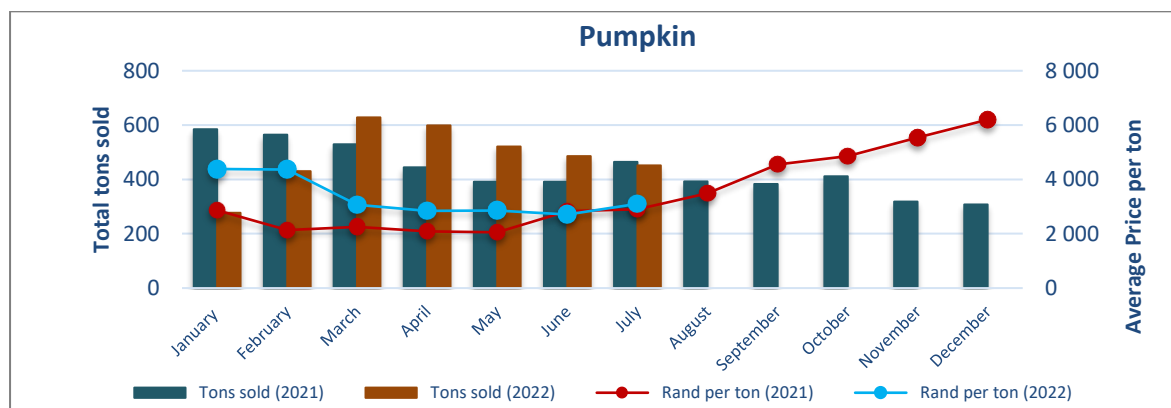
Source: Techno fresh (2022)

8. Pumpkin



A total amount of 451.8 tons of pumpkin was sold at the Cape Town fresh produce markets during July 2022. This presents a decrease of 7% or 33.9 tons from the previous month (June) record of 485.7 tons. The average market price increased by 14.4% or R391 per ton from R2708.8 in June 2022 to R3 099.8. On year and year, basis pumpkin was trading at R2 901.4 per ton in July 2021 compared to R3099.8 in July 2022. These results indicate an increase of 6.8% in price per ton of pumpkin between July 2021 and July 2022.

Figure 8: Pumpkin sales on the Cape Town Fresh Produce Market



Source: Techno fresh (2022)

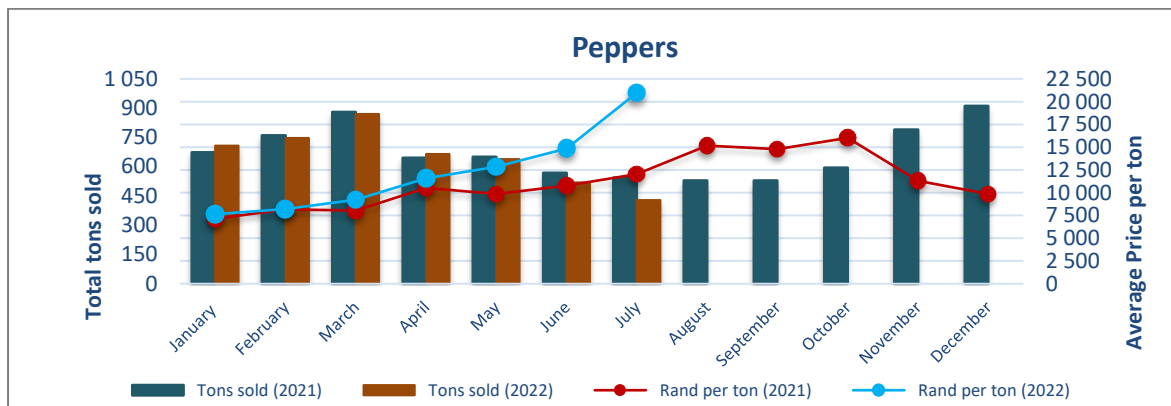
9. Peppers



As illustrated in figure 9 below, the total volume of peppers sold during July 2022 decreased from 518, 6 tons in June 2022 to 428.7 tons. This is indicated by 17.3% decrease in quantity sold of peppers between June 2022 and July 2022. The average market price per ton of peppers on the other hand increased by a notable 41.3% during the reporting period. The average market price of peppers therefore increased from R14845.3 in June 2022 to R20 973.0 in July 2022.

On annual basis, the total volume of peppers sold during the period under review registered a year-on-year decrease of 21.2%. The total volume of peppers sold thus decreased from 543.9 tons of peppers traded in July 2021 to 428.7 tons of peppers traded in July 2022. The average market price per ton increased by a notable 74% from R12 056.4 in July 2021 to R20973.0 in July 2022.

Figure 9: Peppers sales on the Cape Town Fresh Produce Market



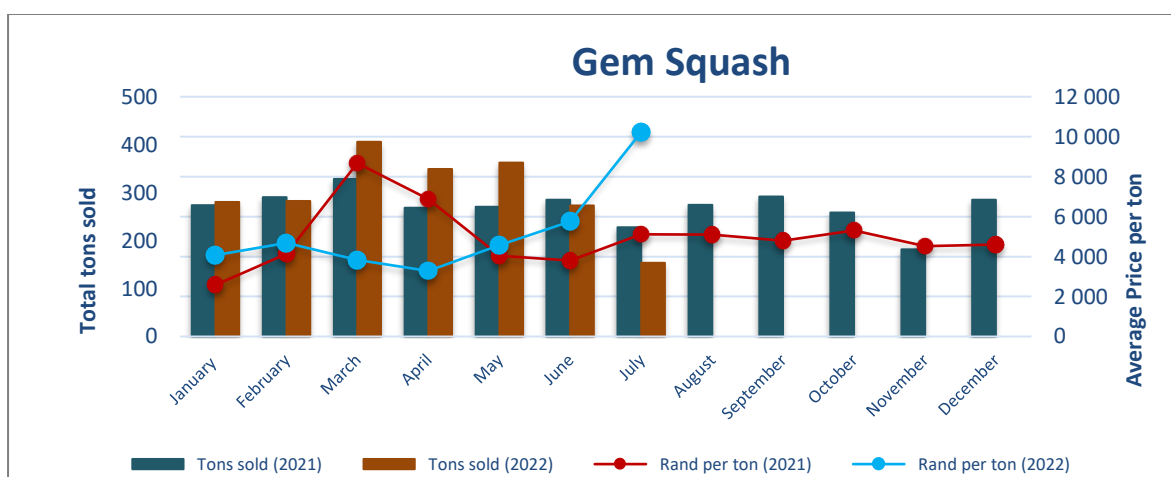
Source: Techno fresh (2021)

10. Gem squash



Figure 10 below shows the total volume of Gem squash sold at the Cape Town fresh produce market in July 2022. The volume of Gem squash sold during July 2022 decreased by 43.7% from 272.9 tons in June 2022 to 153.5 tons. The price per ton of Gem squash on the other hand, increased by 77.7% from R5756.1 in June 2022 to R10228.7 in July 2022. On annual basis, volume of gem squash sold at the Cape Town fresh produce market decreased by 32.7% during the period under review. As a result, the volume of gem squash sold decreased from 228.1 tons in July 2021 to 153.5 tons in July 2022. The average market price of gem squash increased by a notable 100.3% or R5 121.5 per ton from R5 107.2 in July 2021 to R10 228.7 in July 2022.

Figure 10: Gem squash sales on the Cape Town Fresh Produce Market



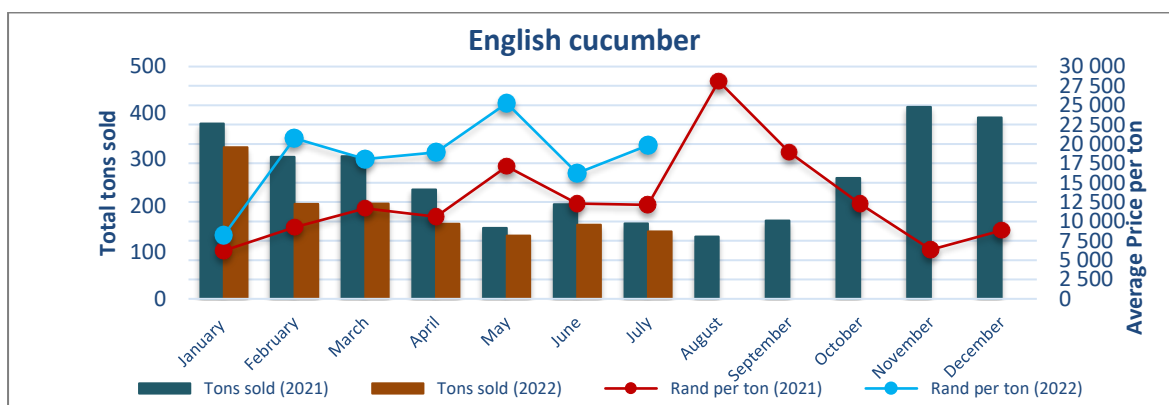
Source: Techno fresh (2022)

11. English cucumber



During the period under review (July 2022), the total volume of English cucumber sold amounted to 145.3 tons which is 8,9% or 14.2 tons less than 159.5 tons which was recorded in June 2022. The average market price of English cucumber increased by 35.7% from R16244.6 in June 2022 to R19 825.6 in July 2022. On annual basis, the volume of tons of English cucumber decreased by 10.5% (or 17 tons) from 162.3 tons in July 2021 to 145.3 tons in July 2022.

Figure 11: English cucumber sales on the Cape Town Fresh Produce Market.



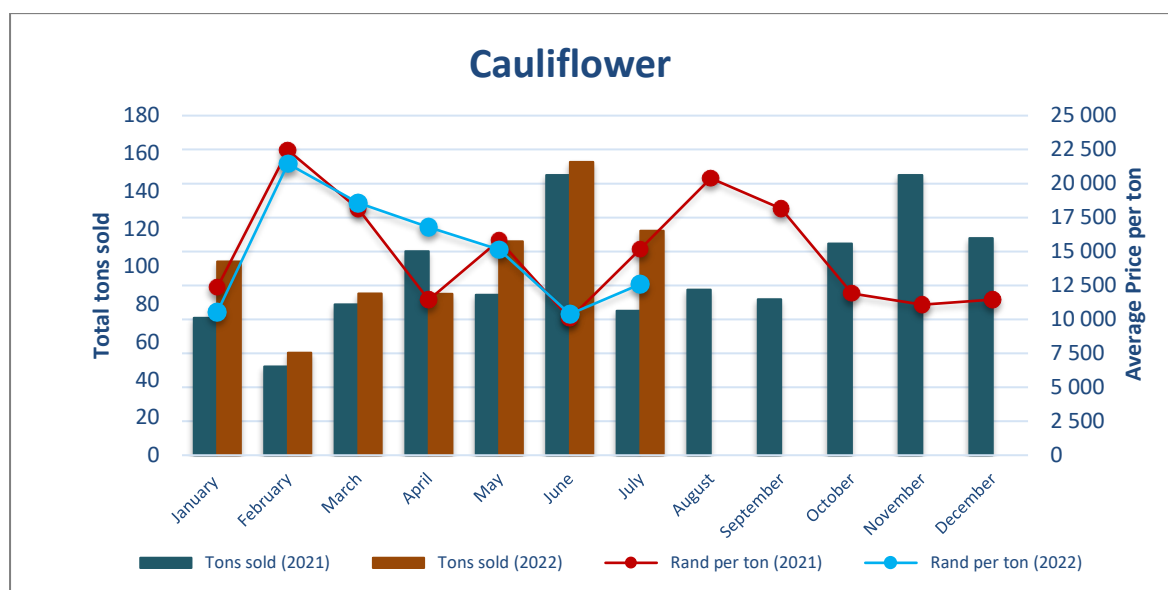
Source: Techno fresh (2022)

12. Cauliflower



Figure 12 below indicates the volume of cauliflower traded at the Cape Town fresh produce market during the month of July 2022. A total amount of 119.0 tons of cauliflower was sold at the Cape Town fresh produce markets during July 2022. This presents 23.5% or 36.5 tons decrease from the previous month (June 2022) record of 155.5 tons. The average market price increased by 21.2% or R2 204.4 from R10387.3 in June 2022 to R12 591.7 in July 2022. On year and year, basis cauliflower was trading at R15 180.3 in July 2021 compared to R12 591.7 in July 2022. These results indicate a decrease of 17.1% in price per ton of cauliflower between July 2021 and July 2022.

Figure 12: Cauliflower sales on the Cape Town Fresh Produce Market



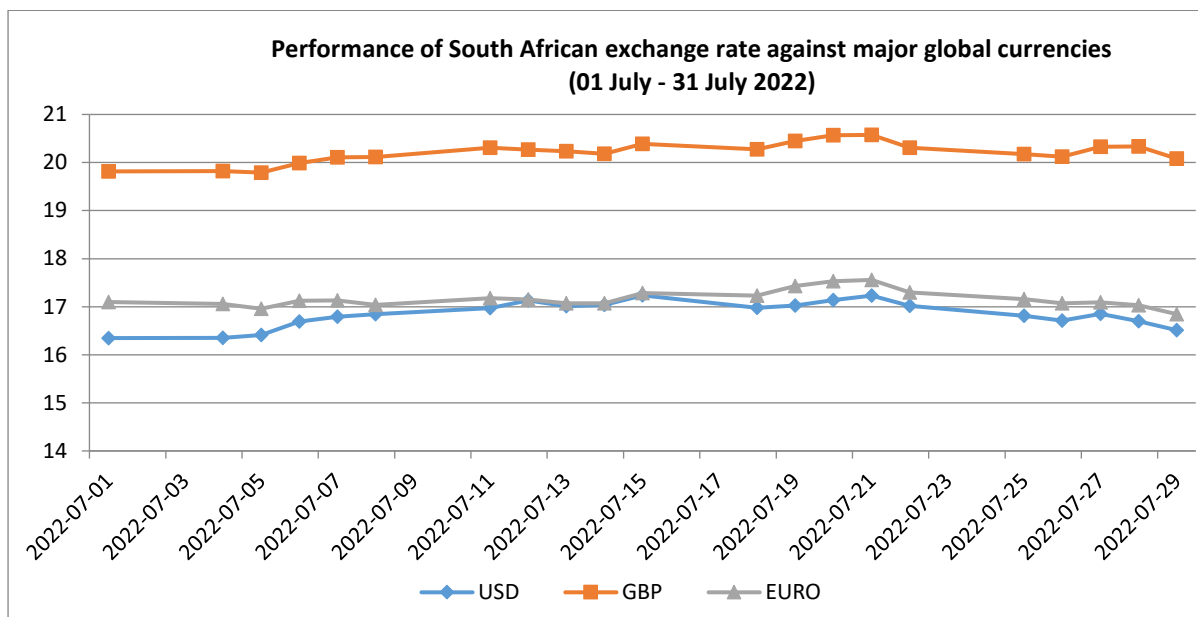
Source: Techno fresh (2022)

TABLE 1: TREND ANALYSIS OF NICHE VEGETABLES TRADED ON THE CAPE TOWN FRESH PRODUCE MARKET FOR JULY 2022.

Product Name (highest to the lowest volumes in July 2022)	Average tons July 2022	% change in average tons July 2022 (m/m)	Average Price July 2022 (Rand/ton)	% change in average price July 2022 (m/m)
Lettuce	96,1	-4,2%	17 526,8	21,8%
Green beans	84,8	-34,2%	20 106,0	30,1%
Beetroot	53,7	-20,7%	11 534,8	54,3%
Broccoli	50,2	-13,0%	27 749,5	27,1%
Brinjals	47,7	-18,2%	23 068,3	64,7%
Baby marrow	34,4	37,7%	10 836,9	-40,8%
Sweetcorn	32,5	-44,4%	25 258,7	19,8%
Spinach	30,3	-17,6%	13 976,0	7,6%
Leeks	27,6	-15,4%	9 766,8	30,7%
Spring onion	26,8	14,5%	18 454,0	-20,6%
Hubbard squash	7,2	-46,2%	2 919,7	-8,8%
Mushroom	5,5	-10,4%	60 262,5	1,5%
Radish	3,2	65,5%	13 876,5	-21,6%
Patty pan	1,5	87,5%	14 621,3	-47,0%
Marrow	0	0%	0	0%

Source: Techno fresh (2022)

Exchange Rates



Source: South African Reserve Bank (2022)

During the reporting period 01 July to 31 July 2022, the average ZAR exchange rate weakened against all three major Currencies (SARB, 2022). When looking at month-to-month average of the Rand against the US Dollar ,Euro and the Great Britain Pound, it can be noted that the rand weakened by 107 cents (6.8%), 74 cents (3.8%) and 46 cents (2.7%) respectively. On average, the US dollar was trading at R16.84 in June 2022 compared to in R15.90 in June 2022. Great Britain Pound was trading at R20.20 in July 2022 while the Euro was at trading at R17.16 in July 2022.

Energy

Table 3.1 Basic fuel Price adjustments

Product Description	Numerical adjustment applicable to the coast parts in South Africa	Price adjustment Description	The average price (cents) applicable to the coastal parts of South Africa
Petrol 95 ULP & LRP	132,00	cents per litre decrease in the retail price	2477,00
Diesel 0.05% Sulphur	88,00	cents per litre increase in the retail price	2387,240
Illuminating Paraffin (Wholesale)	144,00	cents per litre increase the retail price	1763,088
LPGAS (maximum retail price)	57,00	cents per litre decrease in the retail price	3311,00

The Department of Energy has announced fuel price adjustments with effect from 03 August 2022. The price of Petrol 95 ULP & LRP decreased by 132 cents. The price of diesel (0.05% sulphur) and illuminating paraffin also decreased by 88 cents and 144 cents respectively. Lastly, LPGAS's maximum retail price decreased by 57 cents to 3311.00 cents during the reporting period.

ACKNOWLEDGMENTS

The below-listed sources are acknowledged, as cited in this publication:

Agricultural Produce Agents Council (APAC): www.apacweb.org.za

Agricultural Research Council (ARC): www.arc.agric.za

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Department of Agriculture, Forestry and Fisheries (DAFF): www.daff.gov.za

Department of Energy (DoE): www.energy.gov.za

Department of Water & Sanitation (DWS): www.dwa.gov.za

Elsenburg (Western Cape Department of Agriculture): www.elsenburg.com

Organization of the Petroleum Exporting Countries (OPEC): www.opec.org/opec

Potatoes South Africa: www.potatoes.co.za

South African Government: www.gov.za

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Trading Economics (2018): <https://tradingeconomics.com/south-africa/balance-of-trade>

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