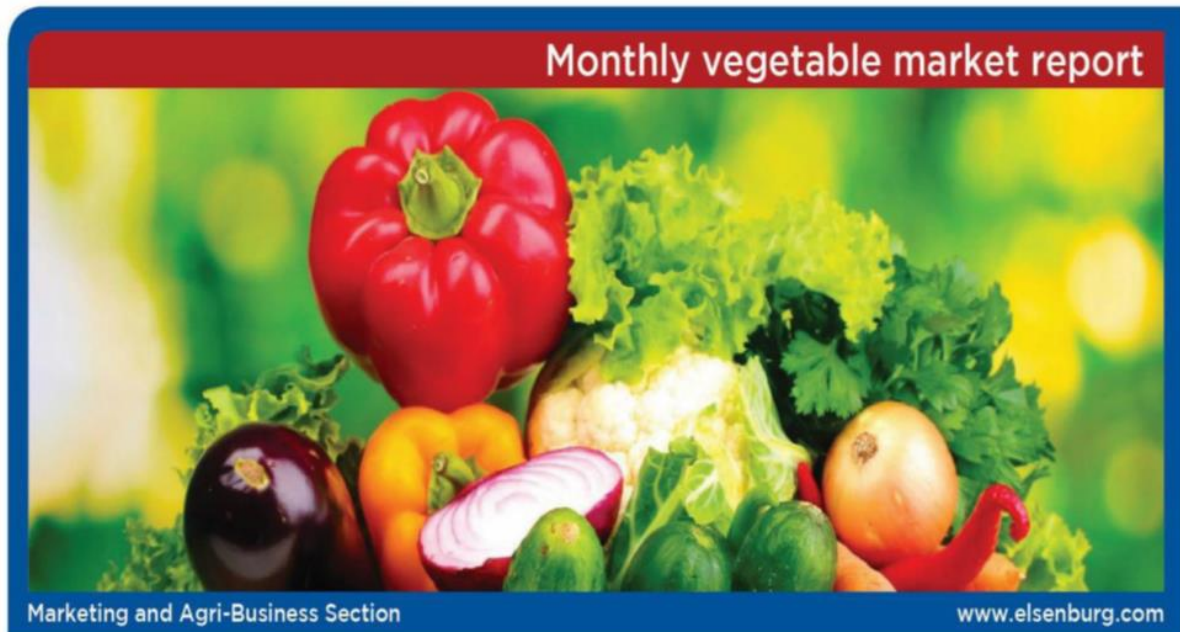


MONTHLY VEGETABLE REPORT



Review period: 01 April 2022 to 01 April 2023

MONTHLY MARKET INFORMATION REPORT: VEGETABLES

Issue: 2023/04

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](http://webapps.daff.gov.za/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

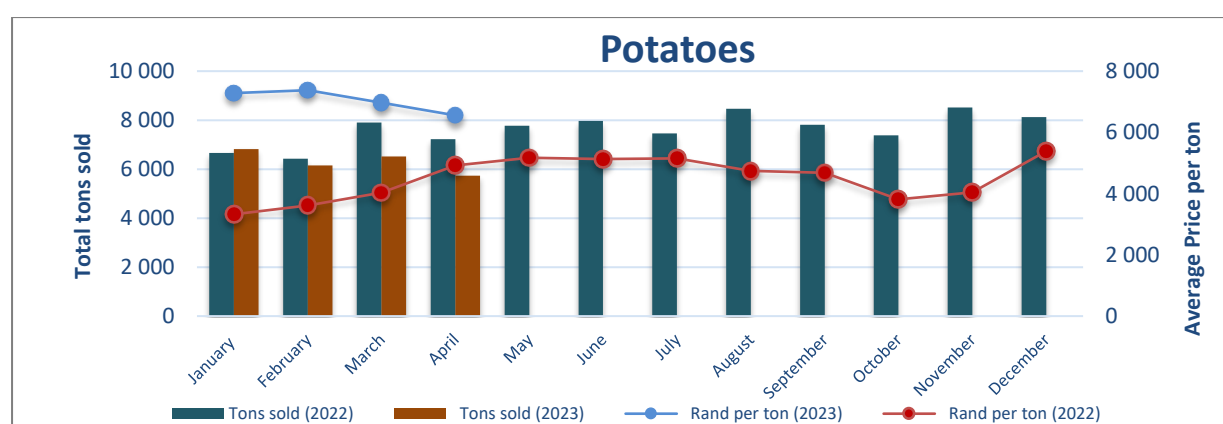
Vegetables are part of important annual crops for the South African agricultural industry. They play a fundamental role in contributing to various agricultural industries who are directly and indirectly involved in the vegetable industry. In return these industries make a significant contribution to 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 figure1, the volume of Potatoes sold at the Cape Town Fresh produce market during the month of April 2023, decreased by 11.9% from 6512.3 tons in March 2023 to 5739.4 tons. This translates to (772.9) ton decrease in the tons of potatoes sold at Cape Town Fresh produce market during the month of April 2023. Subsequently, the average market price per ton of potatoes sold also decreased by 5.9% (or R410.10) from R6966.4 in March 2023 to R6556.3 in April 2023. Sales on the Cape Town market average market prices traded at remarkable 33.1% y/y per ton higher than the same period last year. The volume of potatoes traded showed a decrease of 20.5% y/y compared to the same period last year.

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



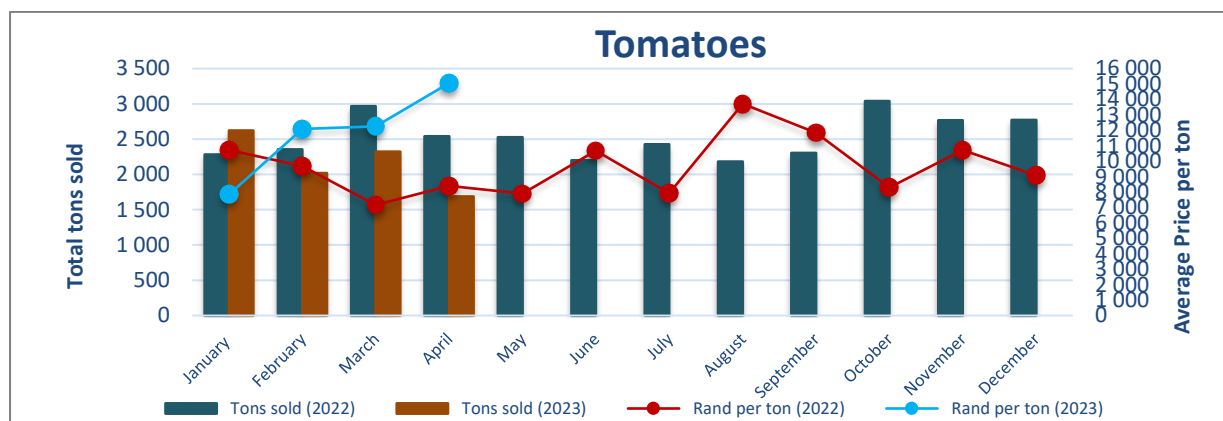
Source: Techno fresh (2023)

2. Tomatoes



The total amount of tomatoes sold during April 2023 was 1685.4 tons, which shows 636(ton) decrease from 2321.3 tons recorded in March 2023. Tomatoes were trading at R15062.1 per ton in April 2023.

Figure 2: Tomatoes sales on the Cape Town Fresh Produce Market



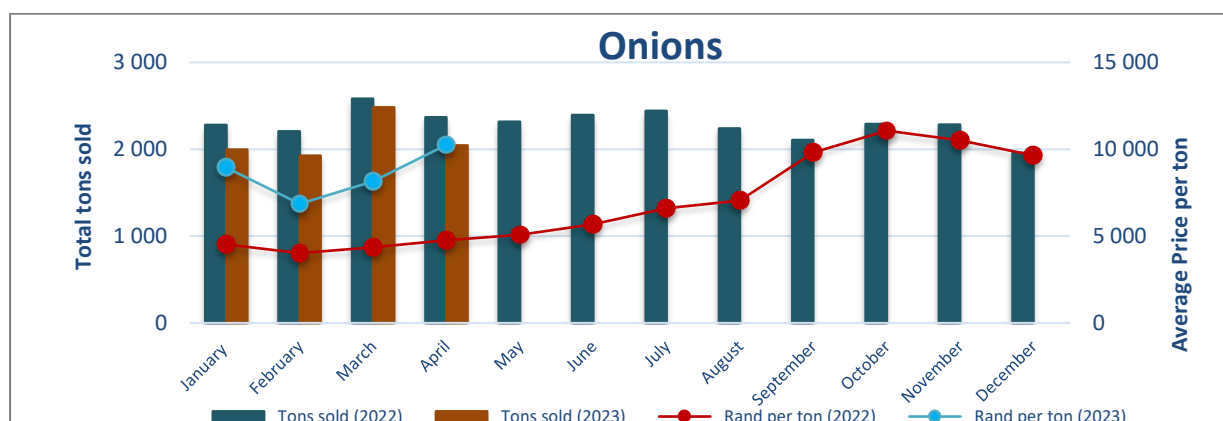
Source: Techno fresh (2023)

3. Onions



In April 2023, the volume of onions traded in the Cape Town fresh produce market was 2043.3 tons, which shows 17.7% decrease from 2481.9 tons recorded in March 2023. Price per ton of onions sold on the market increased by 25.8% from R8151.8 in March 2023 to R10254.7 in April 2023.

Figure 3: Onions prices and quantity traded at Cape Town Fresh Produce market



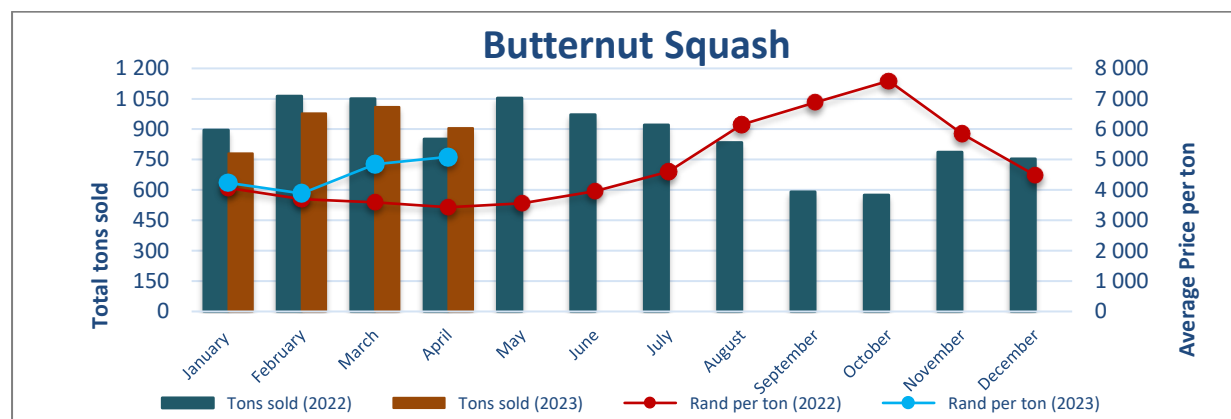
Source: Techno fresh (2023)

4. Butternut Squash



Figure 4 below represents the volume of butternut squash sold at the Cape Town fresh produce market during the month of April 2023. The volume of butternut squash sold decreased by 10.4% from 1009.7 tons in March 2023 to 904.9 tons in April 2023. The price per ton of butternut on the other hand, increased by 5% from R4847.5 in March 2023 to R5089.6 in April 2023. On a year to year basis the quantity of butternut squash sold during April 2022 and April 2023 increased by 6.3% while the price of butternut during the same time period (2022/23) also increased by 48.4%.

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



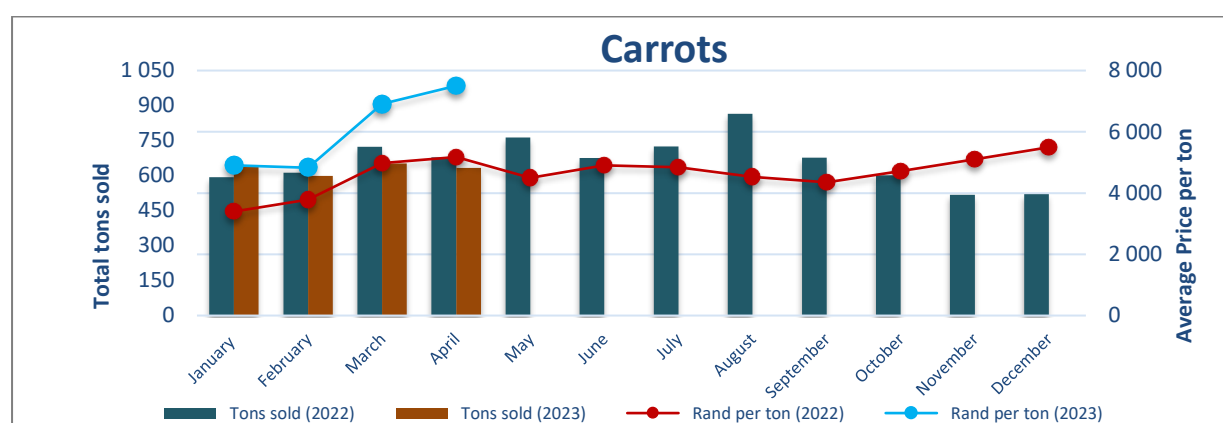
Source: Techno fresh (2023)

5. Carrots



As indicated by Figure 5 below shows the total volume of carrots traded at Cape Town fresh produce market during April 2023. The volume of carrots traded in April 2023, decreased month-month by 2.8% from 651.4 tons in March 2023 to 633.3 tons in April 2023. When comparing year-on-year, the amount of carrots traded during this period decreased by 6.7% from 678.6 tons in April 2022 to 633.3 tons in April 2023. In April 2023 carrots were trading at R7502.2 per ton, which indicates an 8.6% increase in price per ton of carrots between March 2023 and April 2023. The average market price per ton of carrots increased by 44.9% from R5176.0 in April 2022 to R7502.2 in April 2023.

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



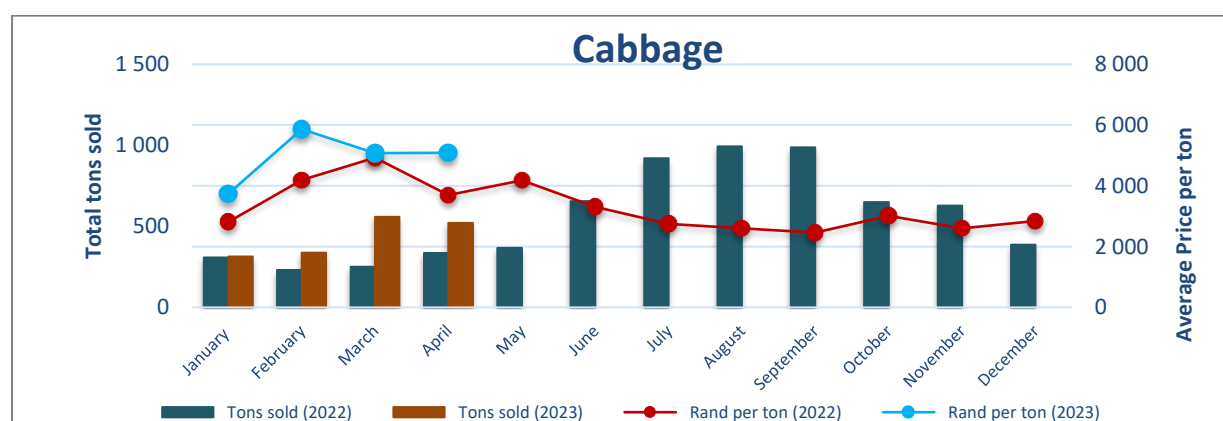
Source: Techno fresh (2023)

6. Cabbages



The total volume of cabbages sold at the Cape Town fresh produce market during April 2023 recorded a month-to-month decrease of 6.9% or 38.8 tons. The total volume of cabbages sold therefore decreased from 559.4 tons in March 2023 to 520.6 tons in April 2023. The average market price per ton of cabbages on the other hand increased by 0.2% from R5080.3 in March 2023 to R5090.5. On annual basis, the total volume of cabbages sold increased from 334.6 tons obtained in April 2022 to 520.6 tons obtained in April 2023. This represents a year-on-year increase of 55.6% that is 186 tons, more than the amount registered within the same period last year.

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



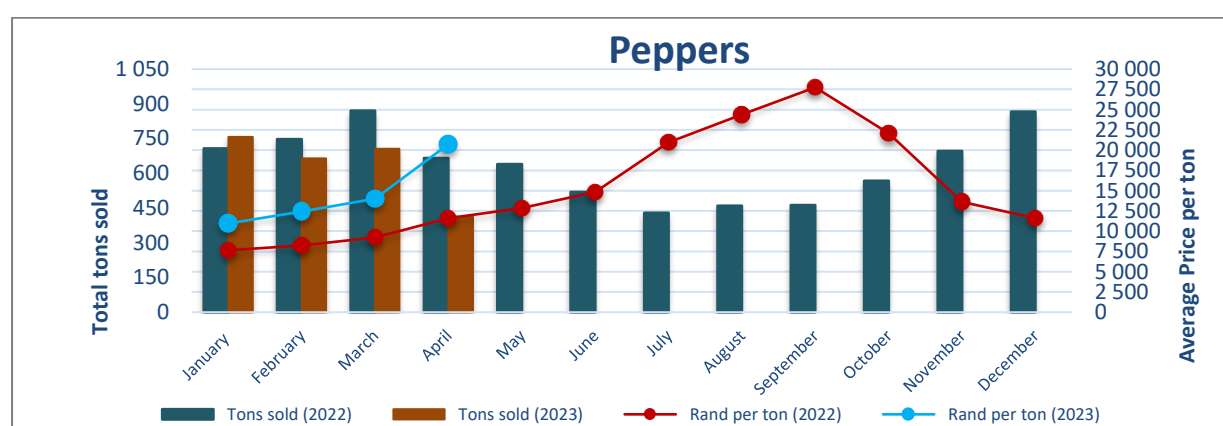
Source: Techno fresh (2023)

7. Peppers



As illustrated in figure 7 below, the total volume of peppers sold during April 2023 decreased by 41.5% from 706.3 tons in March 2023 to 413.1 tons. The average market price of peppers increased by 48.2% from R13988.8 in March 2023 to R20730.5 in April 2023. On annual basis, the total volume of peppers sold during the period under review registered a year-on-year decrease of 37.9%. The total volume of peppers sold thus decreased from 665.3 tons of peppers traded in April 2022 to 413.1 tons of peppers traded in April 2023. The average market price per ton on the other hand, increased by a notable 78.8% from R11595.2 in April 2022 to R20730.5 in April 2023.

Figure 7: Peppers sales on the Cape Town Fresh Produce Market



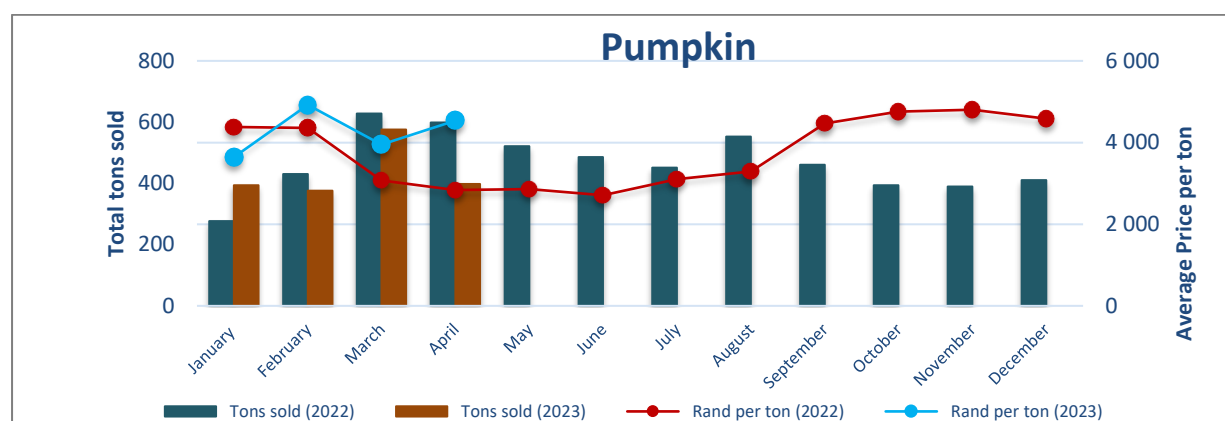
Source: Techno fresh (2023)

8. Pumpkin



A total amount of 397.7 tons of pumpkin was sold at the Cape Town fresh produce markets during April 2023. This presents 31% or 178.3-ton decrease from the previous month (March) record of 575.9 tons. The average market price on the other hand increased by 14.8% or R586 per ton from R3952.7 in March 2023 to R4538.7 in April 2023. On year and year, basis pumpkin was trading at R2837.8 per ton in April 2022 compared to R4538.7 in April 2023. These results indicate an increase of 59.9% in price per ton of pumpkin between April 2022 and April 2023.

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



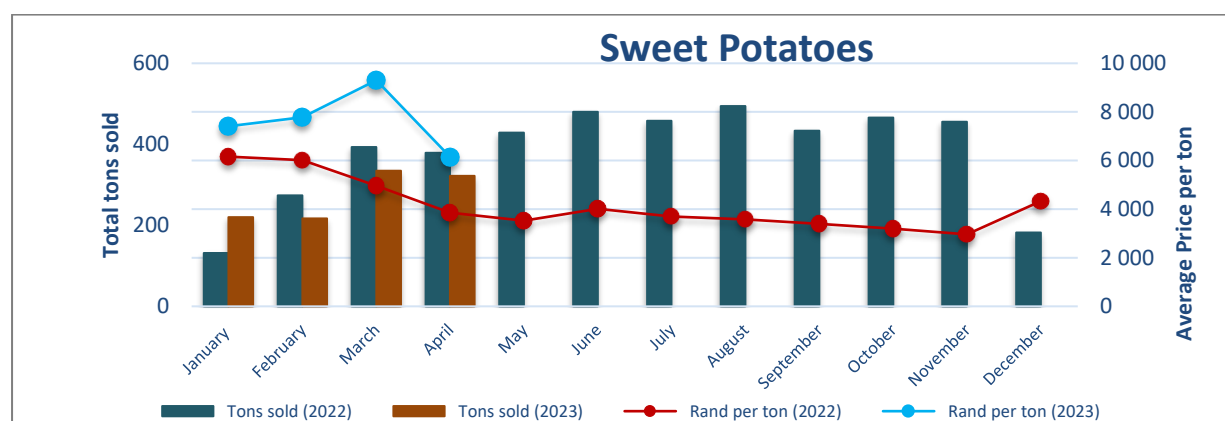
Source: Techno fresh (2023)

9. Sweet potato



The total volume of sweet potatoes sold at the Cape Town fresh produce market decreased from 334.4 tons in March 2023 to 322 tons in April 2023. This translates to 3.7% month-to-month decrease recorded during the month of April 2023. The total volume of sweet potatoes sold decreased year-on-year by 15.1% from 379.4 tons in April 2022 to 322 tons in April 2023. Sweet potatoes were trading at R 6148.5 during April 2023. On annual basis, the average market price per ton increased by 59.3% from R3859.0 in April 2022 to R6148.5 in April 2023.

Figure 9: Sweet potato sales on the Cape Town Fresh Produce Market.



Source: Techno fresh (2023)

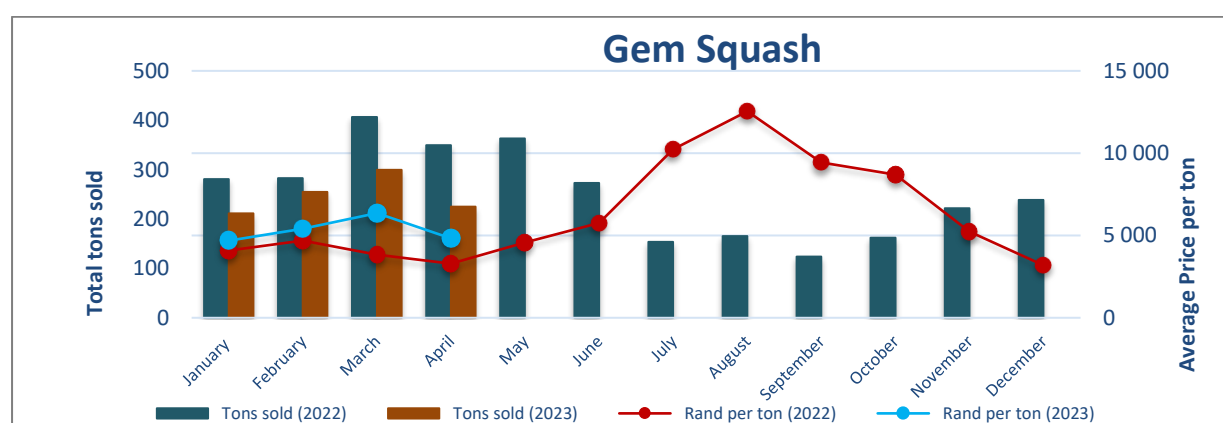
10. Gem squash



Figure 10 bellow shows the total volume of Gem squash sold at the Cape Town fresh produce market in April 2023. The volume of Gem squash sold during April 2023 decreased by 24.9% from 299.3 tons in March 2023 to 224.8 tons in April 2023.

The price per ton of Gem squash also decreased by 24.1% from R6356.9 in March 2023 to R4821.9 in April 2023. On annual basis, volume of gem squash sold at the Cape Town fresh produce market decreased by 35.7% during the period under review. As a result, the volume of gem squash sold decreased from 349.5 tons in April 2022 to 224.8 tons in April 2023. The average market price of gem squash on the other hand increased by 46.9% or R1538.4 per ton from R3283.4 in April 2022 to R4821.9 in April 2023.

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



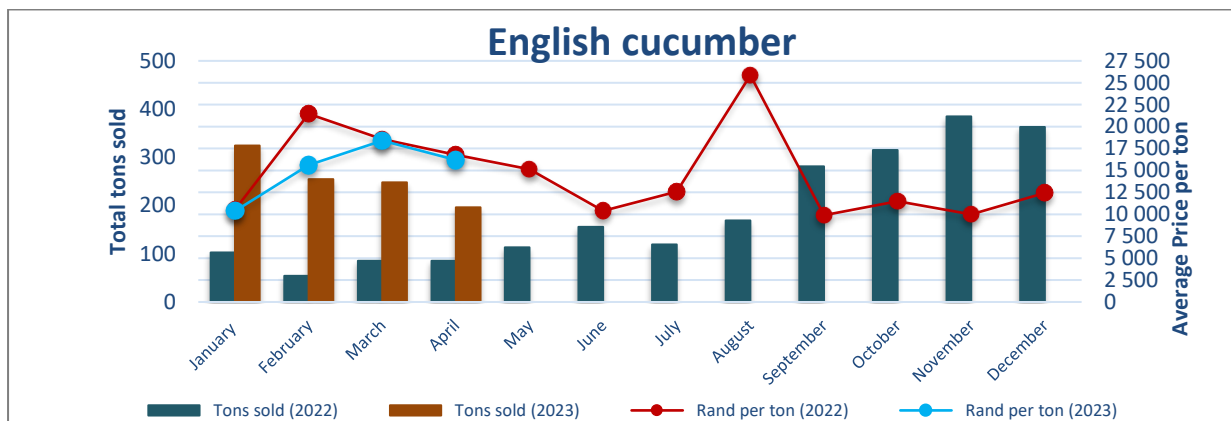
Source: Techno fresh (2023)

1.11. English cucumber



During the period under review (April 2023), the total volume of English cucumber sold amounted to 196.2 tons which is 20.8% or 51.6 tons less than 247.8 tons which was recorded in March 2023. The average market price of English cucumber also decreased by 11.9% from R18404.4 in March 2023 to R16213.3 in April 2023. On annual basis, the volume of tons of English cucumber increased by an unbelievable 129.4% (or 110.7 tons) from 85.5 tons in April 2022 to 196.2 in April 2023.

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



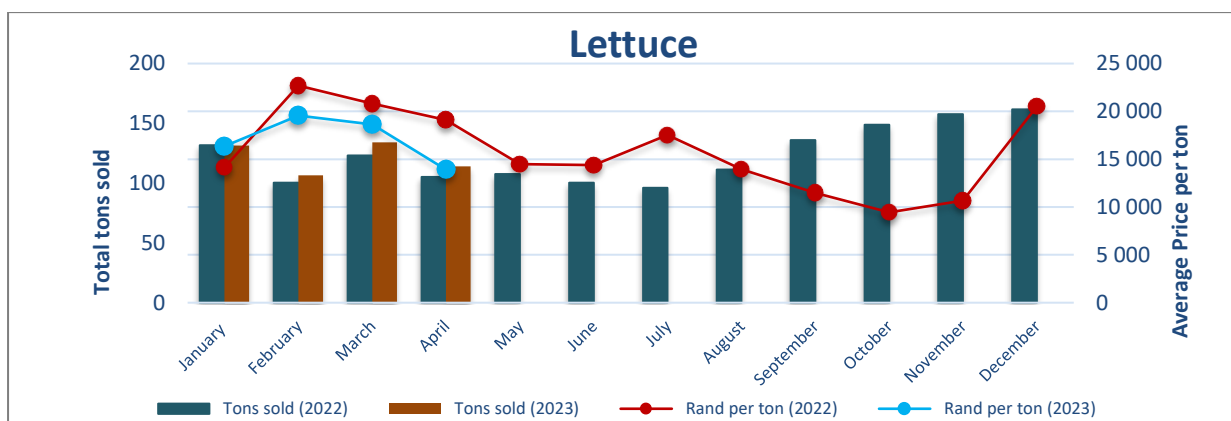
Source: Techno fresh (2023)

12. Lettuce



A total amount of 113.9 tons of lettuce was sold at the Cape Town fresh produce markets during April 2023. This presents 15.1 or 20.3 tons decrease from the previous month (March 2023) record of 134.2 tons. The average market price also decreased by 25.4% or R4726.5 from R18632.8 in March 2023 to R13906.3 in April 2023. On year and year, lettuce was trading at R19105.7 in April 2022 compared to R13906.3 in April 2023. These results indicate a decrease of 27.2% in price per ton of lettuce between April 2022 and April 2023.

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



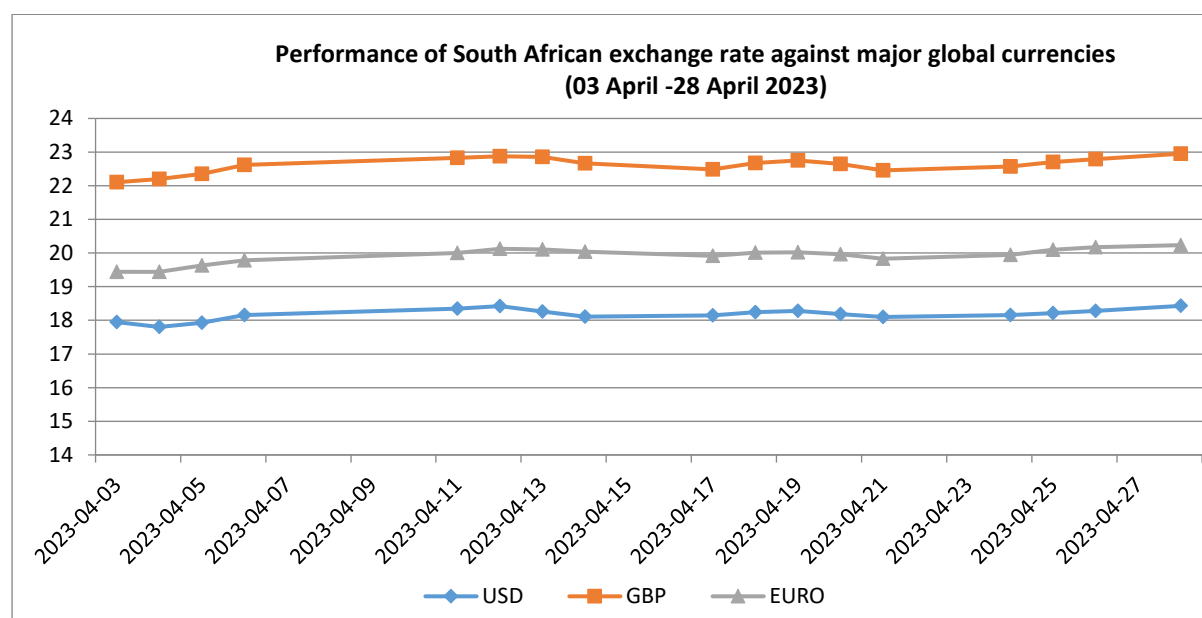
Source: Techno fresh (2023)

Table 1: Trend analysis of niche vegetables traded on the Cape Town Fresh Produce market

| Product Name highest to the lowest volumes in April 2023 | Average tons April 2023 (Ton) | % change in average tons April 2023 (m/m) | Average Price April 2023 (Rand/ton) | % change in average price April 2023 (m/m) |
|--|-------------------------------------|--|---|---|
| Cauliflower | 90,5 | 14,6% | 14 617,4 | -15,0% |
| Beetroot | 83,9 | -22,7% | 9 751,3 | 10,8% |
| Green beans | 74,7 | -10,4% | 20 096,9 | -0,9% |
| Brinjals | 54,9 | 2,0% | 15 517,8 | -10,1% |
| Sweetcorn | 41,8 | -36,5% | 20 760,2 | 8,0% |
| Broccoli | 30,7 | 11,4% | 46 277,2 | -26,5% |
| Baby marrow | 27,1 | -22,6% | 9 716,5 | -52,5% |
| Leeks | 18,7 | -23,7% | 9 299,0 | -3,2% |
| Spring onion | 17,3 | -7,2% | 25 307,8 | -23,7% |
| Spinach | 17,1 | -41,2% | 19 321,9 | 19,2% |
| Radish | 3,8 | 3,8% | 17 923,0 | -5,6% |
| Mushrooms | 1,5 | 254,2% | 81 189,8 | 3,8% |
| Hubbard squash | 0,7 | -79,7% | 4 549,5 | 21,3% |
| Patty pans | 0,6 | -23,9% | 36 327,1 | 74,6% |
| Marrows | 0 | 0% | 0 | 0% |

Source: Techno fresh (2023)

Exchange Rates



Source: South African Reserve Bank (2023)

During the reporting period 03 April to 28 April 2023, looking at month-to-month average of the Rand strengthen slightly against the US Dollar by 0.5%. The US Dollar was trading at R18.17 in April 2023 compared to R18.27 in March 2023. The Rand weakened by 2% against the Great

British Pound and by 1.8% against the Euro. Great British Pound was trading at R22.62 in April 2023 while the Euro was at trading at R19.92 in April 2023.

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 | 5,00 | cents per litre increase in the retail price | 2225,00 |
| Diesel 0.05% Sulphur | 80,58 | cents per litre decrease in the retail price | 2016,630 |
| Illuminating Paraffin (Wholesale) | 138,20 | cents per litre decrease the retail price | 1379,558 |
| LPGAS (maximum retail price) | 93,00 | cents per litre decrease in the retail price | 3517,00 |

The Department of Energy has announced fuel price adjustments with effect from 05 April 2023. The price of Petrol 95 ULP & LRP increased by 5 cents. The price of diesel (0.05% sulphur) , illuminating paraffin and LPGAS's maximum retail price increased by 80 cents, 138 cents and 93 cents respectively 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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