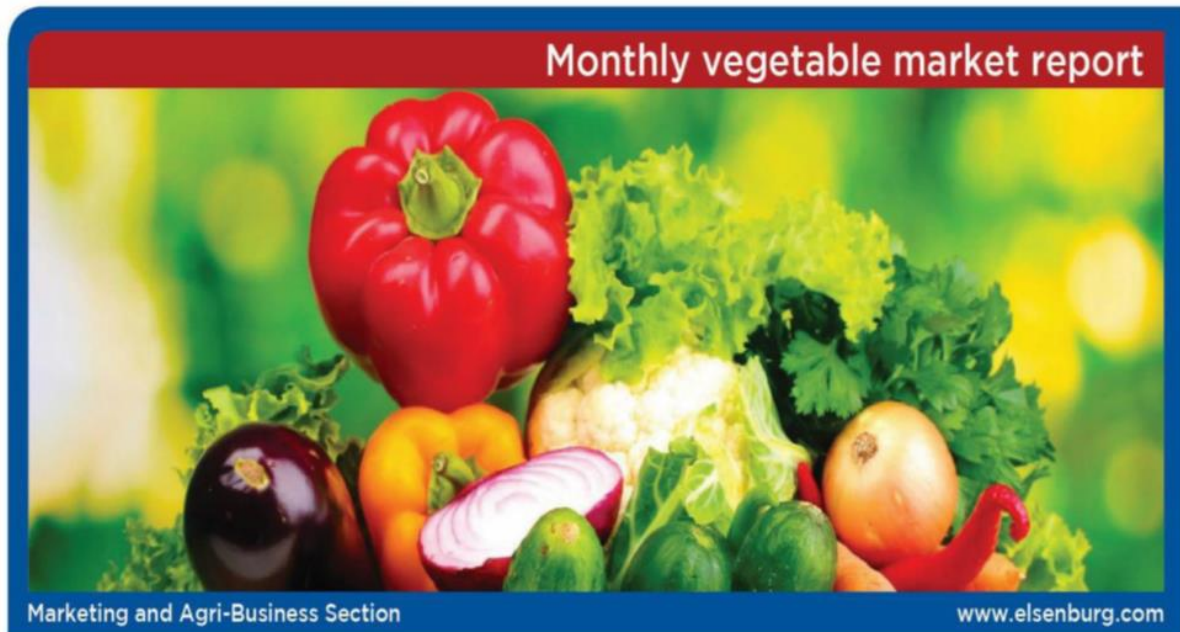


MONTHLY VEGETABLE REPORT



Review period: 01 July 2022 to 01 July 2023

MONTHLY MARKET INFORMATION REPORT: VEGETABLES

Issue: 2023/07

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](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

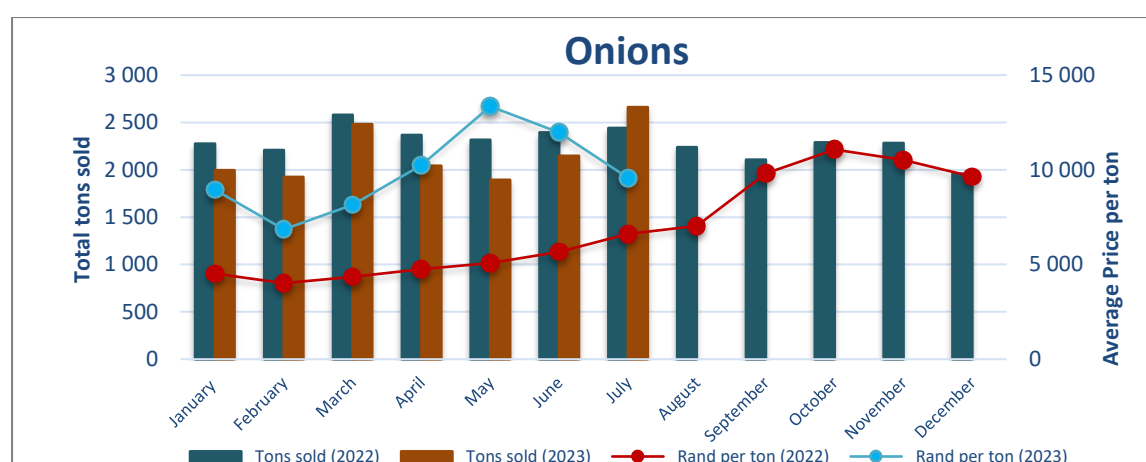
Vegetables are part of important annual crops for the South African agricultural industry. They play a fundamental role in contributing to various agricultural industries who are directly and indirectly involved in the vegetable industry. In return these industries make a significant contribution to 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 July 2023, decreased by 3.8% from 7388.1 tons in June 2023 to 7106.3 tons. This translates to (281.7) ton decline in the tons of potatoes sold at Cape Town Fresh produce market during the month of July 2023. Subsequently, the average market price per ton of potatoes sold increased by 4.3% (or R308.2) from R7220.5 in June 2023 to 7528.6 in July 2023. Sales on the Cape Town market average market prices traded at remarkable 46.1% y/y per ton higher than the same period last year. The volume of potatoes traded however showed a decrease of 4.7% y/y compared to the same period last year.

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



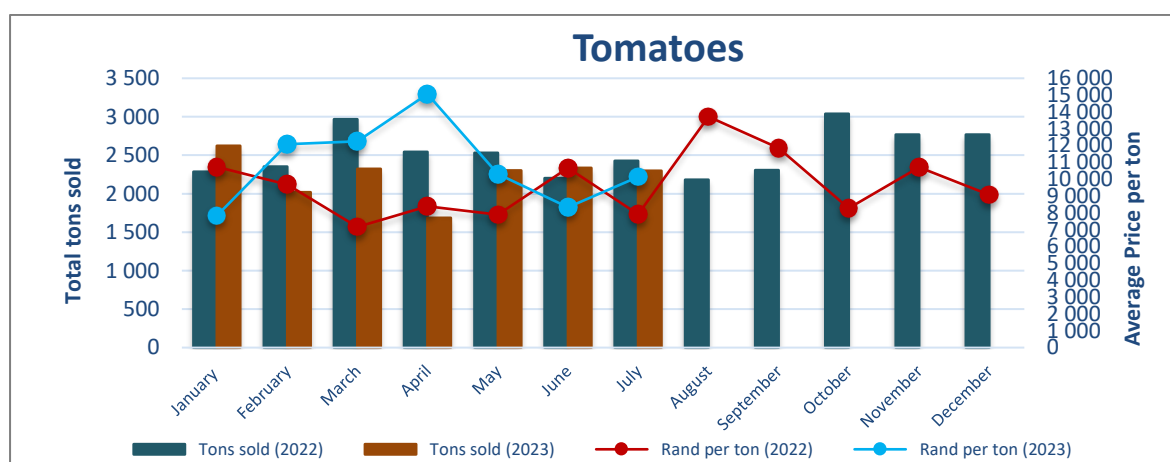
Source: Techno fresh (2023)

2. Tomatoes



The total amount of tomatoes sold during July 2023 was 2296.5 tons, which shows 37.3(ton) decrease from 2333.8 tons recorded in June 2023. Tomatoes were trading at R10134.0 per ton in July 2023.

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



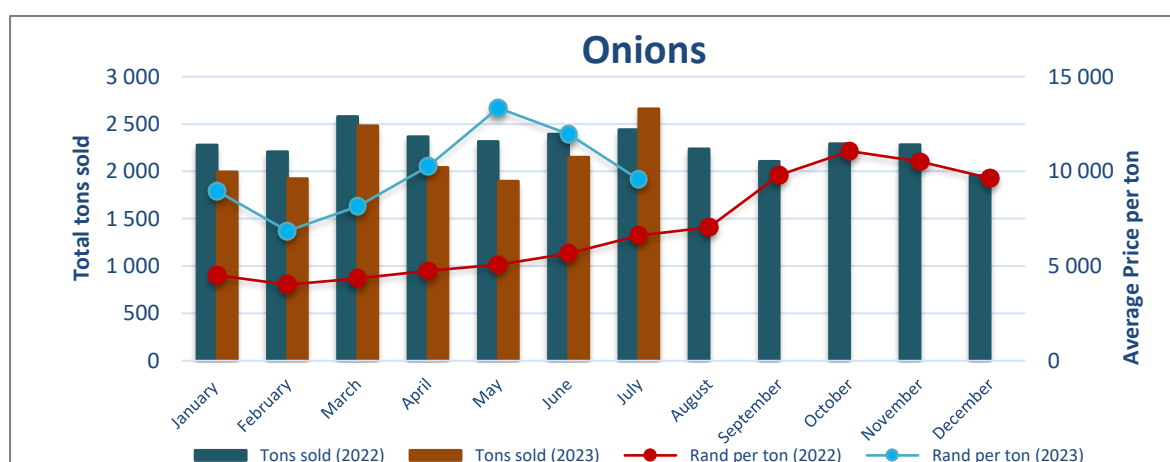
Source: Techno fresh (2023)



3. Onions

In July 2023, the volume of onions traded in the Cape Town fresh produce market was 2662.4 tons, which shows 23.9% increase from 2149.1 tons recorded in June 2023. Price per ton of onions sold on the market decreased by 20% from R11971.8 in June 2023 to R9574.8 in July 2023.

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



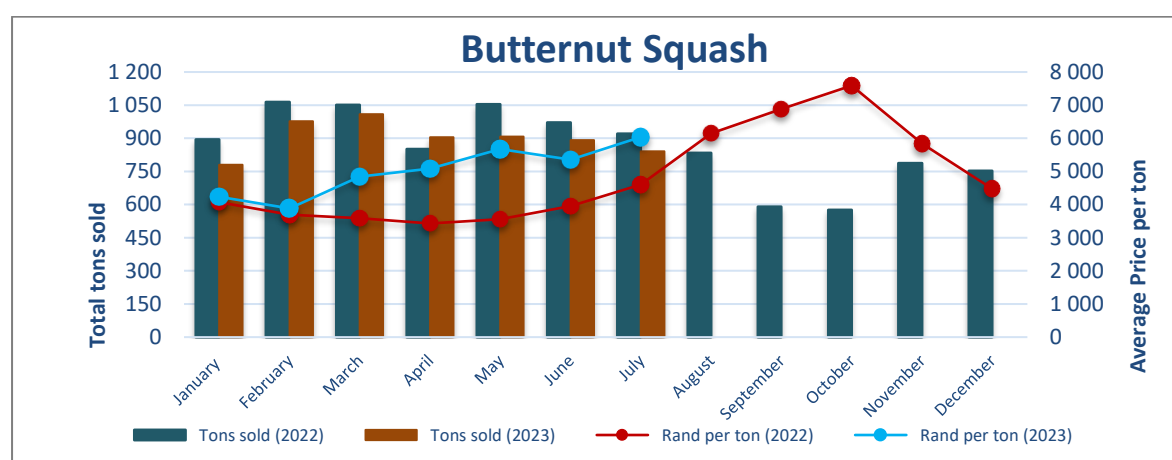
Source: Techno fresh (2023)

4. Butternut Squash



Figure 4 below represents the volume of butternut squash sold at the Cape Town fresh produce market during the month of July 2023. The volume of butternut squash sold decreased by 5.7% from 892.3 tons in June 2023 to 841.4 tons in July 2023. The price per ton of butternut increased by 12.7% from R5359.8 in June 2023 to R6038.9 in July 2023. On a year to year basis the quantity of butternut squash sold during July 2022 and July 2023 decreased by 8.7% while the price of butternut sold during the same time period(2022/23) increased by 31.2%.

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



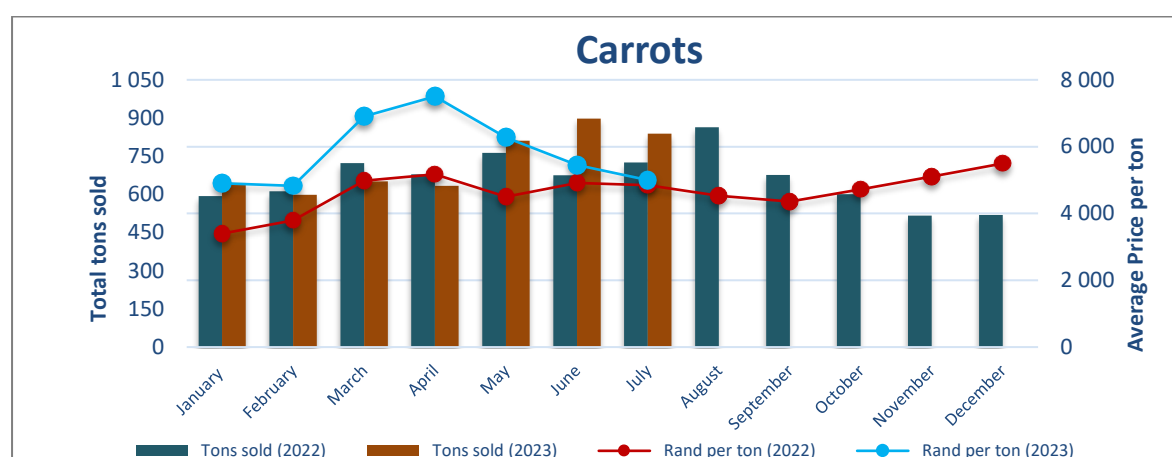
Source: Techno fresh (2023)

5. Carrots



As indicated by Figure 5 below shows the total volume of carrots traded at Cape Town fresh produce market during July 2023. The volume of carrots traded in July 2023, decreased month-month by 6.5% from 897.2 tons in June 2023 to 838.5 tons in July 2023. When comparing year-on-year, the amount of carrots traded during this period also increased by 15.6% from 725.2 tons in July 2022 to 838.5 tons in July 2023. In July 2023 carrots was trading at R4998.3 per ton, which indicates 8.4% decrease in price per ton of carrots between June 2023 and July 2023. The average market price per ton of carrots increased by 3.2% from R4842.5 in July 2022 to R4998.3 in July 2023.

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



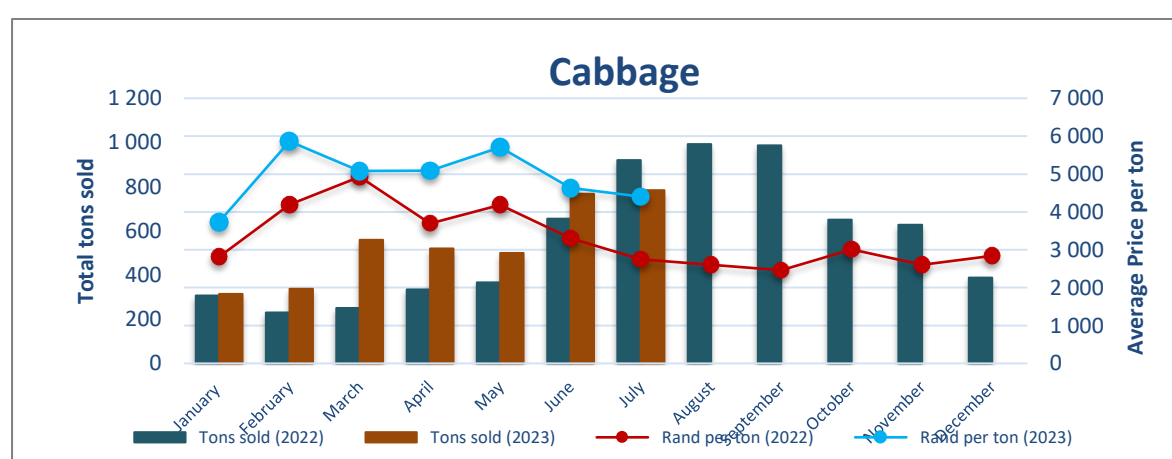
Source: Techno fresh (2023)

6. Cabbages



The total volume of cabbages sold at the Cape Town fresh produce market during July 2023 recorded a month-to-month increase of 2.1% or 15.9 tons. The total volume of cabbages sold therefore increased from 768.7 tons in June 2023 to 784.6 in July 2023. The average market price per ton of cabbages on the other hand decreased by 4.8% from R4630.8 in June 2023 to R4407.2 in July 2023. On an annual basis, the total volume of cabbages sold decreased from 920.2 tons obtained in July 2022 to 784.6 tons obtained in July 2023. This represents a year-on-year decrease of 14.7% that is 135.6 tons, less than the amount registered within the same period last year.

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



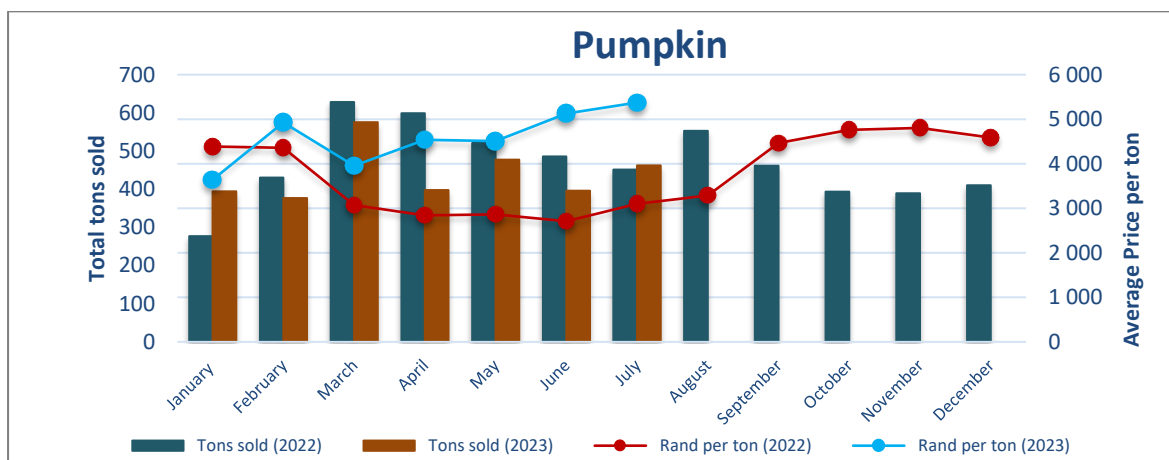
Source: Techno fresh (2023)

7. Pumpkin



A total amount of 462 tons of pumpkin was sold at the Cape Town fresh produce markets during June 2023. This presents 16.5% or 65.6-ton increase from the previous month (June) record of 396.5 tons. The average market price also increased by 4.9% or R248.8 per ton from R5125.6 in June 2023 to R5374.5 in July 2023. On year and year, basis pumpkin was trading at R3099.8 per ton in July 2022 compared to R5374.5 in July 2023. These results indicate an increase of 73.4% in price per ton of pumpkin between July 2022 and July 2023.

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



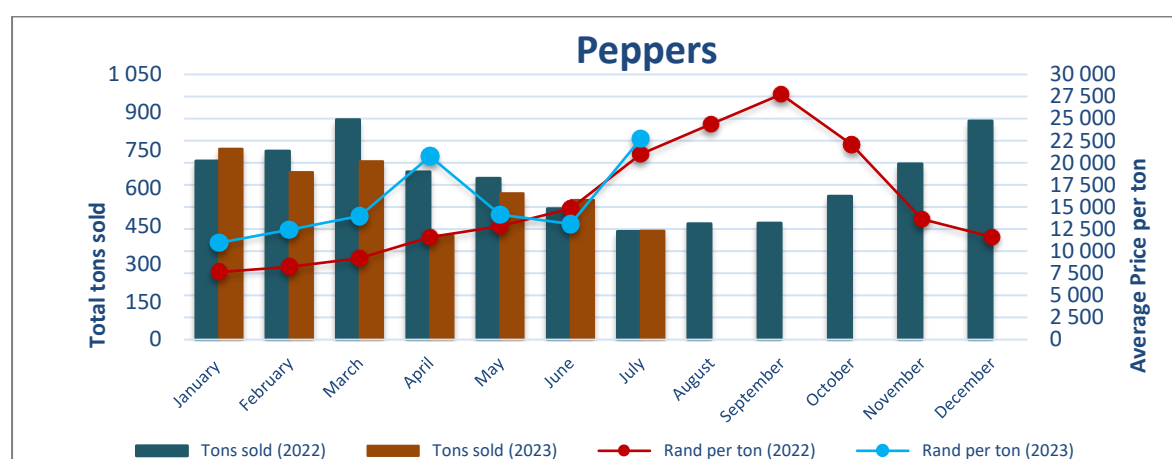
Source: Techno fresh (2023)

8. Peppers



As illustrated in figure 8 below, the total volume of peppers sold during July 2023 decreased by 22.1% from 552.9 tons in June 2023 to 431.0 tons in July 2023. The average market price of peppers on the other hand increased by 73.8% from R13073.3 in June 2023 to R22718.4 in July 2023. On annual basis, the total volume of peppers sold during the period under review registered a year-on-year increase of 0.5%. The total volume of peppers sold thus increased from 428.7 tons of peppers traded in July 2022 to 431 tons of peppers traded in July 2023. The average market price per ton also increased by 8.3% from R20973.0 in July 2022 to R22718.4 in July 2023.

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



Source: Techno fresh (2023)

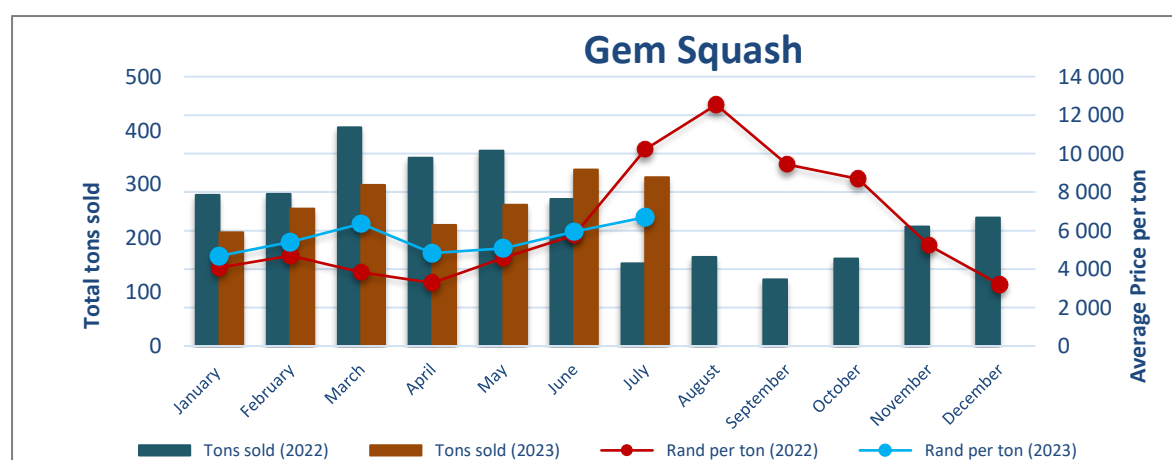
9. Gem squash



Figure 9 below shows the total volume of Gem squash sold at the Cape Town fresh produce market in July 2023. The volume of Gem squash sold during July 2023 decreased by 4.4% from 327.4 tons in June 2023 to 313.1 tons in July 2023.

The price per ton of Gem squash on the other hand, increased by 12.5% from R5948.0 in June to R6693.7 in July 2023. On annual basis, volume of gem squash sold at the Cape Town fresh produce market increased by a remarkable 104% during the period under review. As a result, the volume of gem squash sold increased from 153.5 tons in July 2022 to 313.1 tons in July 2023. The average market price of gem squash decreased by 34.6% or R3535.0 per ton from R10228.7 in July 2022 to R6693.7 in July 2023.

Figure 9: Gem squash sales on the Cape Town Fresh Produce Market



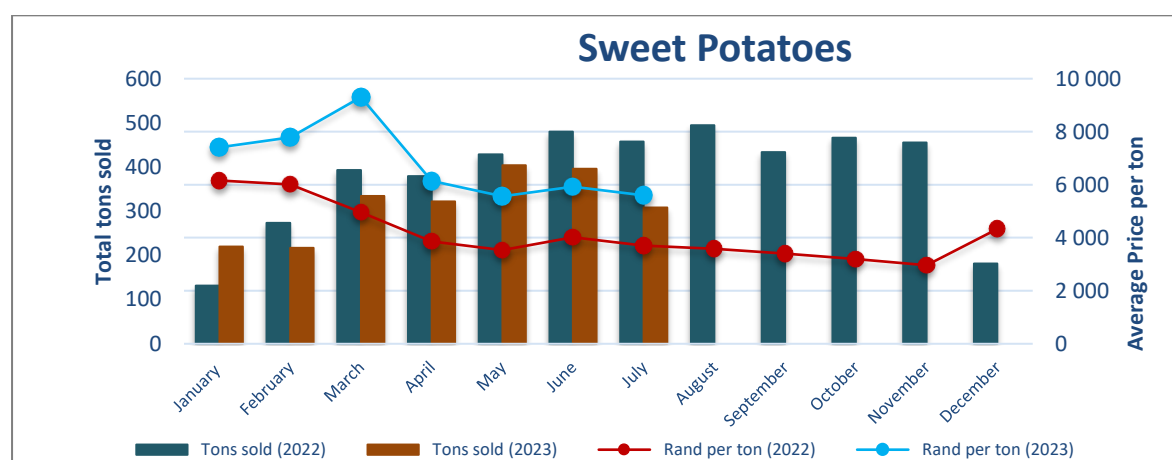
Source: Techno fresh (2023)

10. Sweet potato



The total volume of sweet potatoes sold at the Cape Town fresh produce market decreased from 395.8 tons in June to 308.7 tons in July 2023. This translates to 22% month-to-month decline recorded during the month of July 2023. The total volume of sweet potatoes sold also decreased year-on-year by 32.6% from 457.9 tons in July 2022 to 308.7 tons in July 2023. Sweet potatoes were trading at R5596.2 during July 2023. On annual basis, the average market price per ton increased by 51.3% from R3698.0 in July 2022 to R5596.2 in July 2023.

Figure 10: Sweet potato sales on the Cape Town Fresh Produce Market.



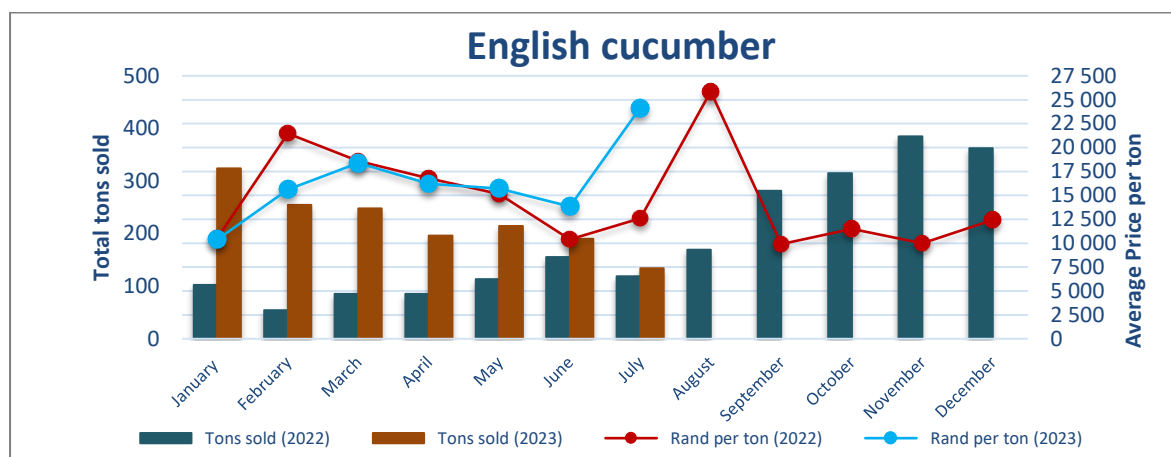
Source: Techno fresh (2023)

1.11. English cucumber



During the period under review (July 2023), the total volume of English cucumber sold amounted to 134.0 tons which is 29.5% or 56.2 tons less than 190.2 tons which was recorded in June 2023. The average market price of English cucumber on the other hand increased by a notable 74.6% from R13837.2 in June 2023 to R24157.4 in July 2023. On annual basis, the volume of tons of English cucumber increased by 12.6% (or 15tons) from 119.0 tons in July 2022 to 134 in July 2023.

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



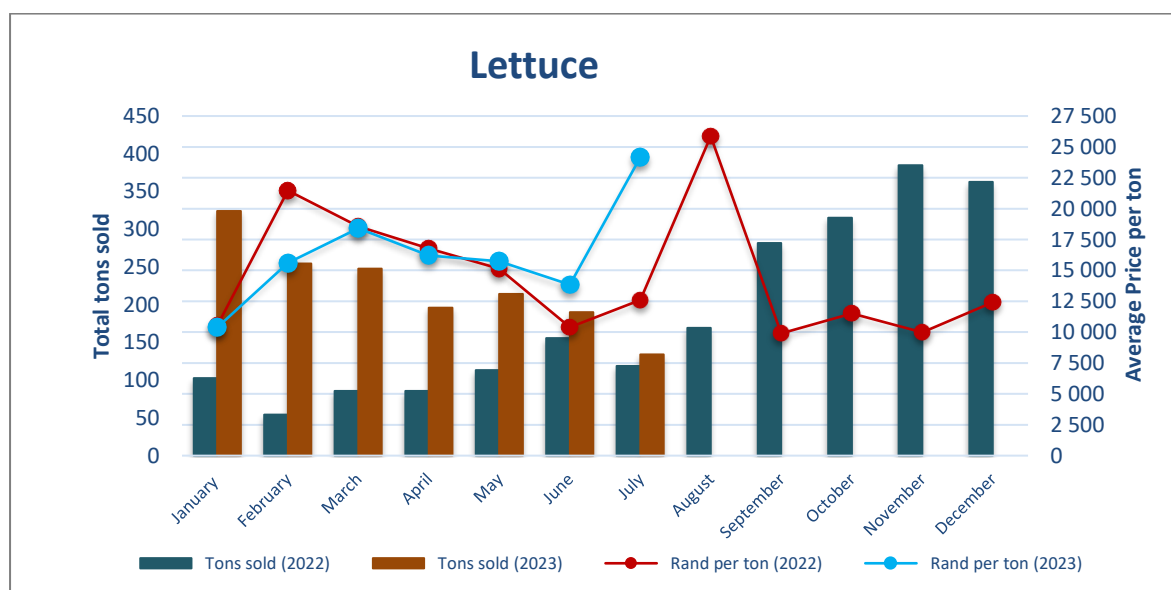
Source: Techno fresh (2023)

12. Lettuce



A total amount of 86.3 tons of lettuce was sold at the Cape Town fresh produce markets during July 2023. This presents 10.1% or 9.7 tons decrease from the previous month (June 2023) record of 96 tons. The average market price increased by 69.8% or R9818.1 from R14067.5 in June 2023 to R23885.5 in July 2023. On year and year, lettuce was trading at R17526.8 in July 2022 compared to R23885.5 in July 2023. These results indicate an increase of 36.3% in price per ton of lettuce between July 2022 and July 2023.

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



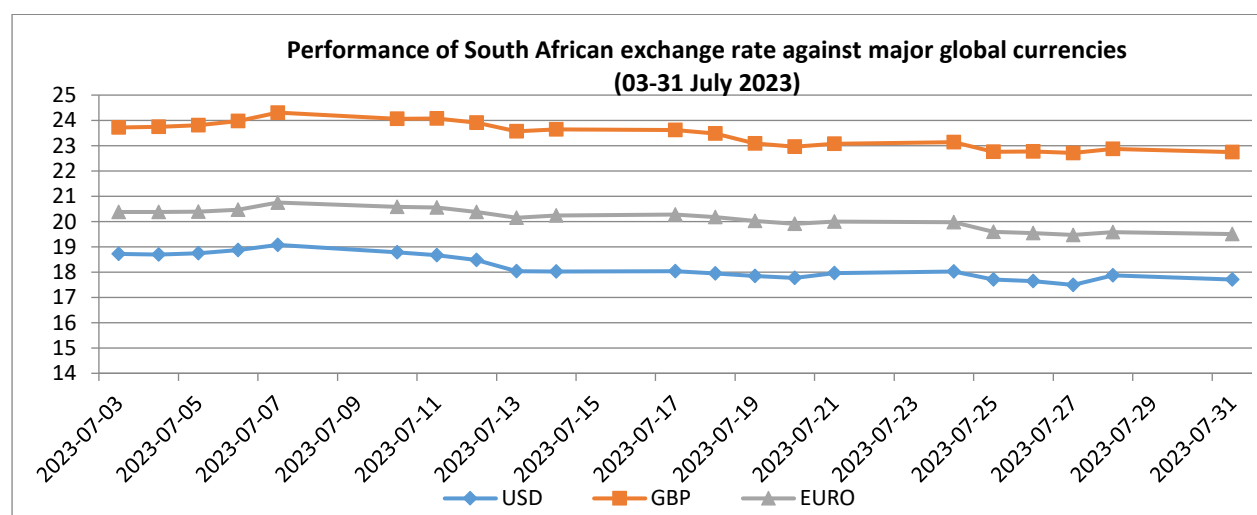
Source: Techno fresh (2023)

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

Product Name highest to the lowest volumes in July 2023	Average tons July 2023 (Ton)	% change in average tons July 2023 (m/m)	Average Price July 2023 (Rand/ton)	% change in average price July 2023 (m/m)
Beetroot	81,1	-21,7%	9 162,6	26,2%
Cauliflower	70,3	-19,5%	22 954,9	38,5%
Green beans	69,5	-32,9%	24 609,4	38,8%
Brinjals	49,0	2,6%	15 307,8	-12,6%
Broccoli	45,3	15,2%	30 901,6	2,1%
Leeks	35,9	1,7%	5 067,3	-21,5%
Baby marrow	34,0	-28,7%	19 928,0	41,1%
Spinach	33,2	12,6%	24 692,8	50,7%
Spring onion	20,1	11,9%	21 194,8	-8,1%
Sweetcorn	19,4	-51,8%	37 864,8	47,3%
Mushrooms	2,5	26,0%	75 031,4	-4,3%
Radish	1,7	-23,1%	17 818,5	1,7%
Patty pans	1,1	124,0%	17 192,7	33,9%
Hubbard squash	0	0%	0	0%
Marrows	0	0%	0	0%

Source: Techno fresh (2023)

Exchange Rates



Source: South African Reserve Bank (2023)

During the reporting period 03 July to 31 July 2023, looking at month-to-month average of the Rand has strengthened against all three major currencies. The US Dollar was trading at R18.19 in July 2023 compared to R18.77 in June 2023. The Great British pound was trading at 23.42 in July 2023 compared to R23.67 in May 2023. Lastly, Euro was at trading at R20.11 in June 2023 compared to R20.31 in May 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	17,00	cents per litre decrease in the retail price	2174,00
Diesel 0.05% Sulphur	18,00	cents per litre increase in the retail price	1877,090
Illuminating Paraffin (Wholesale)	4,00	cents per litre decrease the retail price	1299,558
LPGAS (maximum retail price)	296,00	cents per litre decrease in the retail price	2853,00

The Department of Energy has announced fuel price adjustments with effect from 05 July 2023. The price of Petrol 95 ULP & LRP decreased by 17 cents, the price of diesel (0.05% sulphur) increased by 18 cents and the price of paraffin decreased by 4 cents. Lastly, LPGAS's maximum retail price increased by 296 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

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

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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Statistics South Africa (Stats SA): www.statssa.gov.za

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

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