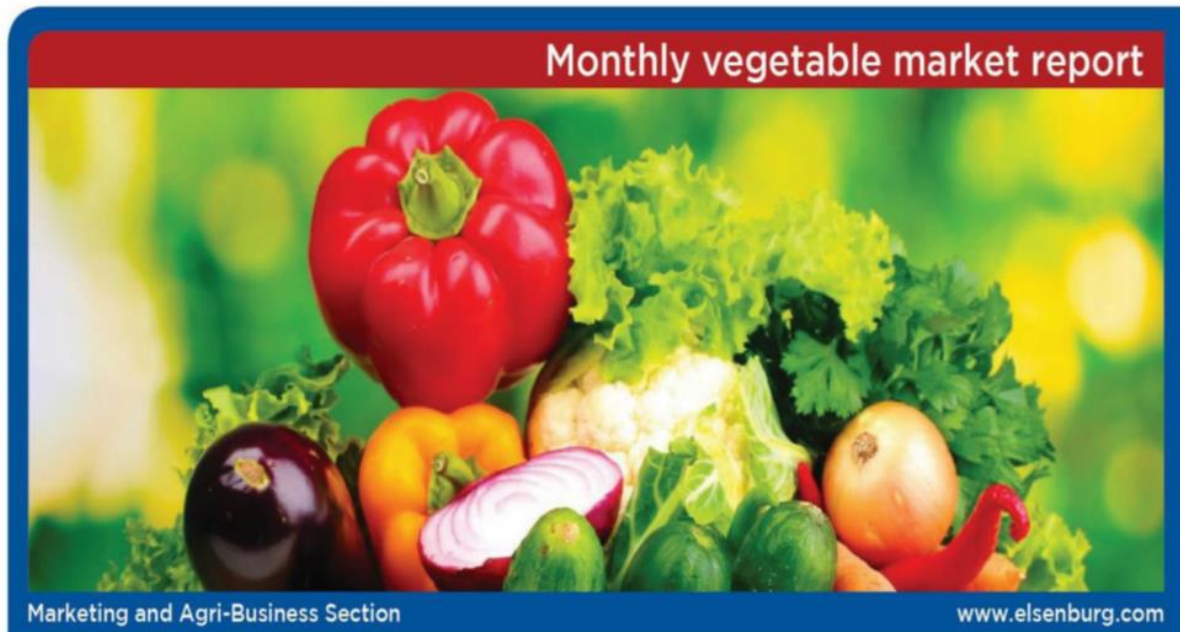


MONTHLY VEGETABLE REPORT



Review period: 01 September 2022 to 01 September 2023

MONTHLY MARKET INFORMATION REPORT: VEGETABLES

Issue: 2023/09

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

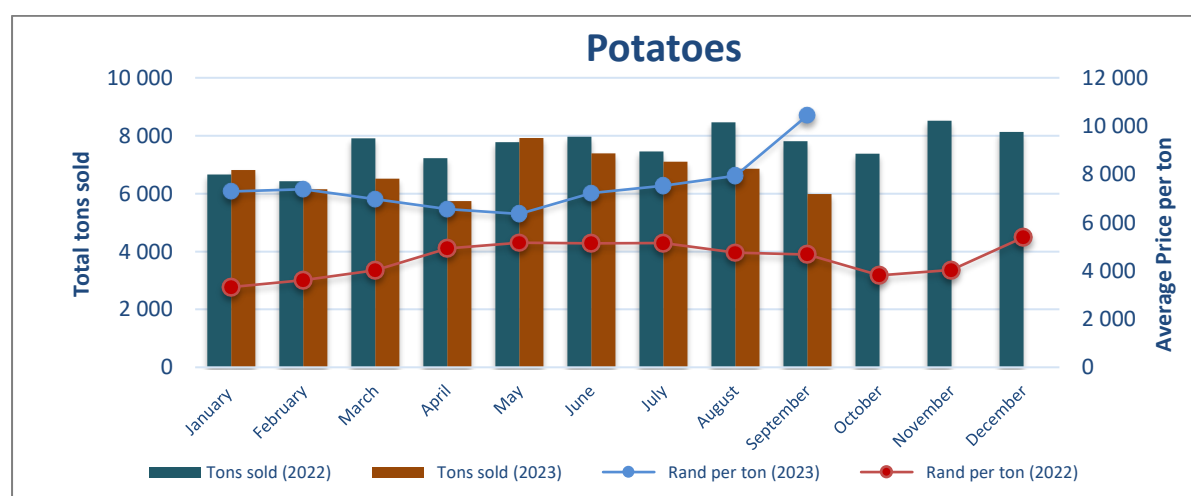
Vegetables are part of important annual crops for the South African agricultural industry. They play a fundamental role in contributing to various agricultural industries who are directly and indirectly involved in the vegetable industry. In return these industries make a significant contribution to 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 September 2023, decreased by 12.8% from 6861.7 tons in August 2023 to 5985.7 tons. This translates to (876.1) ton decline in the tons of potatoes sold at Cape Town Fresh produce market during the month of September 2023. Subsequently, the average market price per ton of potatoes sold increased by 31.4%(or R2495.3) from R7944.5 in August 2023 to R10439.9 in September 2023. Sales on the Cape Town market traded at remarkable 123.2% y/y per ton higher than the same period last year. The volume of potatoes traded however showed a decrease of 23.3% y/y compared to the same period last year.

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



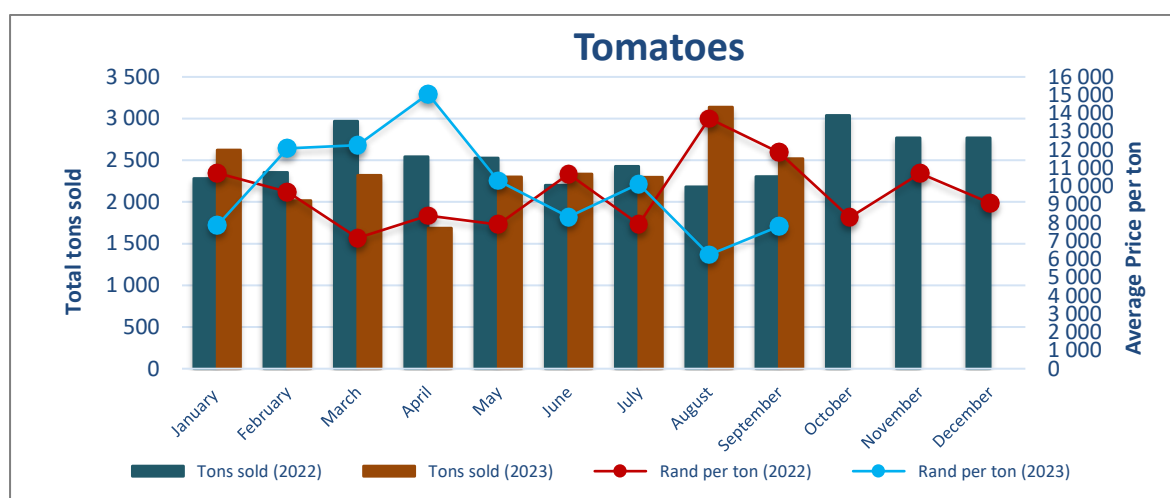
Source: Techno fresh (2023)

2. Tomatoes



The total amount of tomatoes sold during September 2023 was 2520.7 tons, which shows 616.4(ton) decrease from 3137.1tons recorded in August 2023. Tomatoes were trading at R7820.0 per ton in September 2023.

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



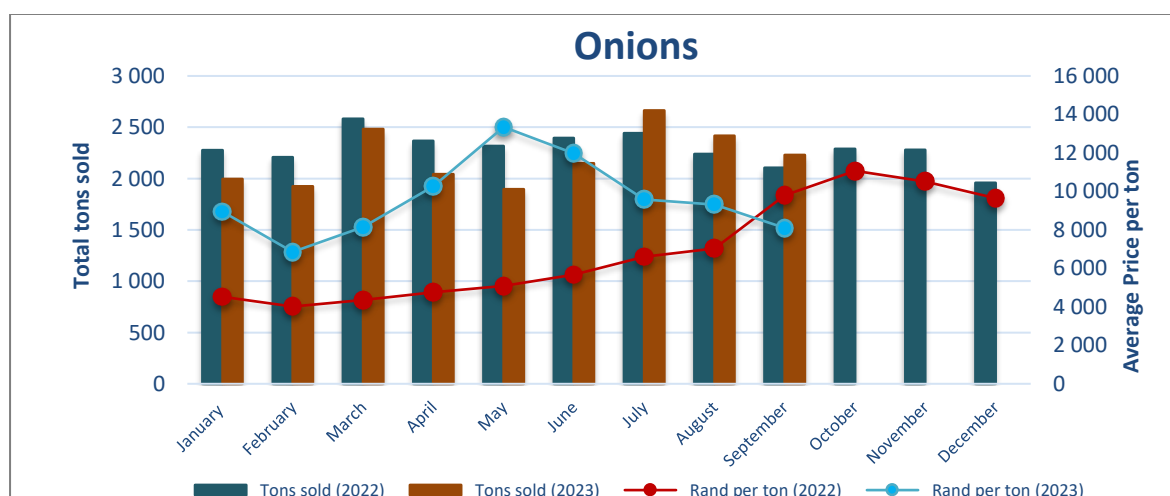
Source: Techno fresh (2023)

3. Onions



In September 2023, the volume of onions traded in the Cape Town fresh produce market was 2229.2 tons, which shows 7.8% decrease from 2416.5 tons recorded in August 2023. Price per ton of onions sold on the market also decreased by 13% from R9306.0 in August 2023 to R8099.0 in September 2023.

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



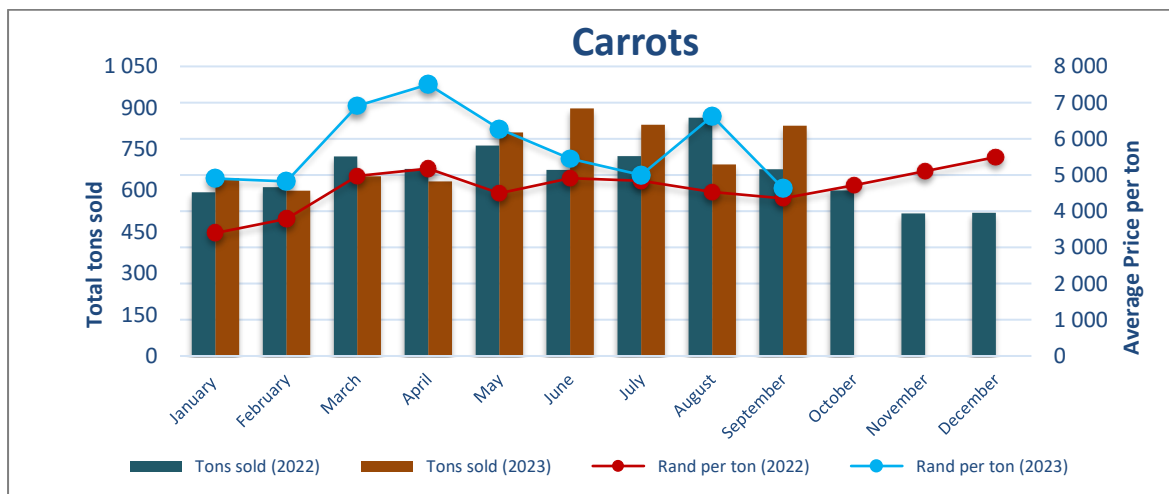
Source: Techno fresh (2023)

4. Carrots



As indicated by Figure 4 below shows the total volume of carrots traded at Cape Town fresh produce market during September 2023. The volume of carrots traded in September 2023, increased month-month by 20.2% from 694.5 in August 2023 to 835.0 tons. When comparing year-on-year, the amount of carrots traded during this period also increased by 23.4% from 676.6 tons in September 2022 to 835.0 tons in September 2023. In September 2023 carrots was trading at R4630.4 per ton, which indicates 30.1% decrease in price per ton of carrots between August 2023 and September 2023. The average market price per ton of carrots on the other hand, increased by 6.3% from R4354.6 in September 2022 to R4630.4 in September 2023.

Figure 4: Carrots sales on the Cape Town Fresh Produce Market



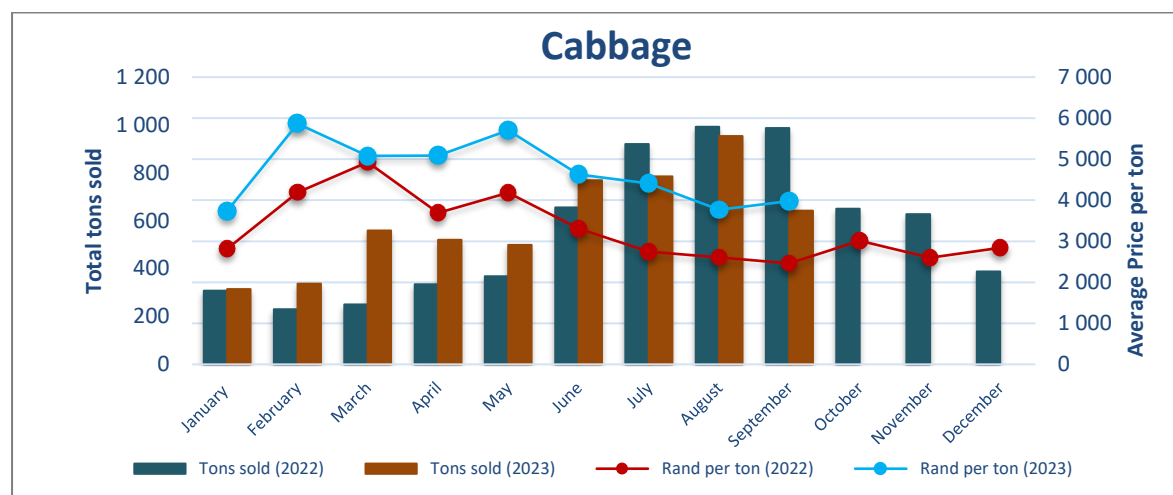
Source: Techno fresh (2023)

5. Cabbages



The total volume of cabbages sold at the Cape Town fresh produce market during September 2023 recorded a month-to-month decrease of 32.6% or 311.3 tons. The total volume of cabbages sold therefore decreased from 953.8 tons in August 2023 to 642.5 tons. The average market price per ton of cabbages on the other hand increased by 5.7% from R3768.1 in August 2023 to R3983.5. On annual basis, the total volume of cabbages sold decreased from 987.2 tons obtained in September 2022 to 642.5 tons in September 2023. This represents a year-on-year decrease of 34.9% that is 344.7 tons, less than the amount registered within the same period last year.

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



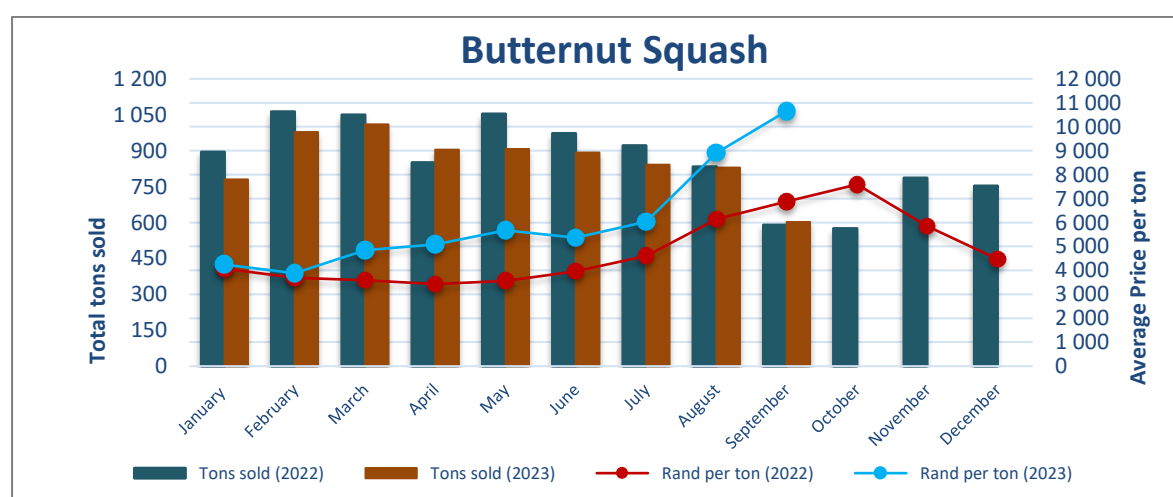
Source: Techno fresh (2023)

6. Butternut Squash



Figure 5 below represents the volume of butternut squash sold at the Cape Town fresh produce market during the month of September 2023. The volume of butternut squash sold decreased by 27.4% from 829.6 tons August 2023 to 602.5 tons in September 2023. The price per ton of butternut increased by 19.6% from R8913.9 in August 2023 to R10660.7 in September 2023. On a year to year basis the quantity of butternut squash sold during September 2022 and September 2023 increased by 2.1% while the price of butternut sold during the same time period (2022/23) increased by 55%.

Figure 6: Butternut squash sales on the Cape Town Fresh Produce Market



Source: Techno fresh (2023)

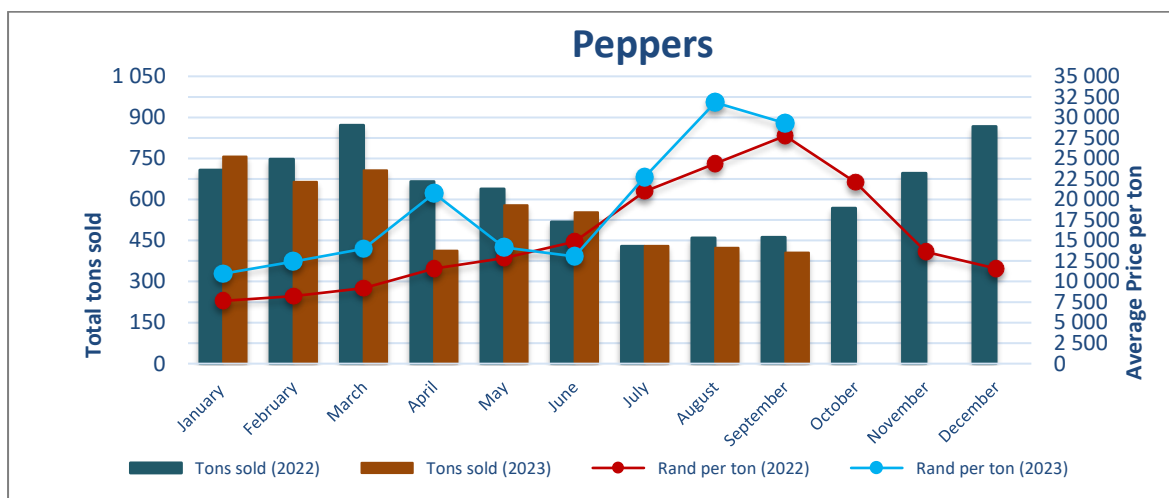
7. Peppers



As illustrated in figure 7 below, the total volume of peppers sold during September 2023 decreased by 4.1% from 423.2 tons in August 2023 to 405.7 tons.

The average market price of peppers also decreased by 7.9% from R31817.2 in August 2023 to R29300.1 in September 2023. On annual basis, the total volume of peppers sold during the period under review registered a year-on-year decrease of 12.2%. The total volume of peppers sold thus decreased from 462.0 tons of peppers traded in September 2022 to 405.7 tons of peppers traded in September 2023. The average market price per ton on the other hand, increased by 5.6% from R27750,4 in September 2022 to R29300.1 in September 2023.

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



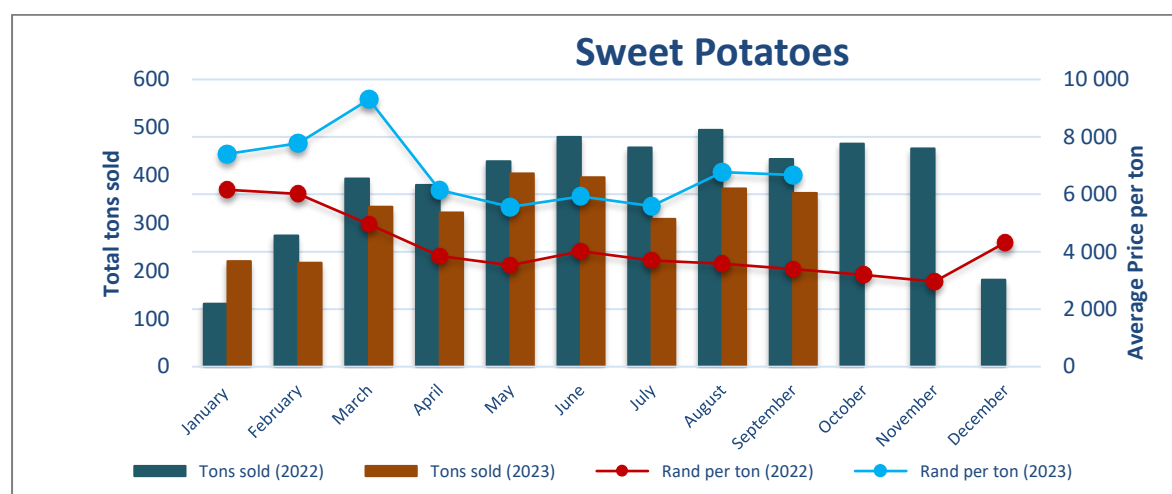
Source: Techno fresh (2023)

8. Sweet potato



The total volume of sweet potatoes sold at the Cape Town fresh produce market decreased from 372.0 tons in August 2023 to 362.9 tons in September 2023. This translates to 2.5% month-to-month decrease recorded during the month of September 2023. The total volume of sweet potatoes sold decreased year-on-year by 16.3% from 433.7 tons in September 2022 to 362.9 tons in September 2023. Sweet potatoes were trading at R6669.6 during September 2023. On annual basis, the average market price per ton increased by 96.4% from R3395.3 in September 2022 to R6669.6 in September 2023.

Figure 8: Sweet potato sales on the Cape Town Fresh Produce Market.



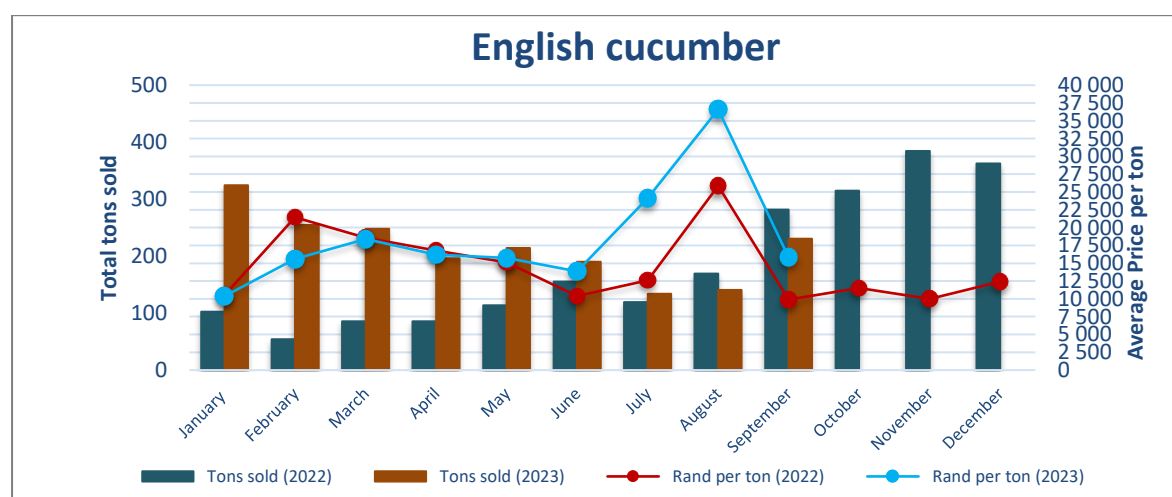
Source: Techno fresh (2023)

1.9 English cucumber



During the period under review (September 2023), the total volume of English cucumber sold amounted to 230.6 tons which is 63.9% or 89.9 tons more than 140.7 tons which was recorded in August 2023. The average market price of English cucumber on the other hand, decreased by a notable 56.7% from R36589.9 in August 2023 to R15851.6 in September 2023. On annual basis, the volume of tons of English cucumber decreased by 18.1% (or 51tons) from 281.6 tons in September 2022 to 230.6 tons in September 2023.

Figure 9: English cucumber sales on the Cape Town Fresh Produce Market.



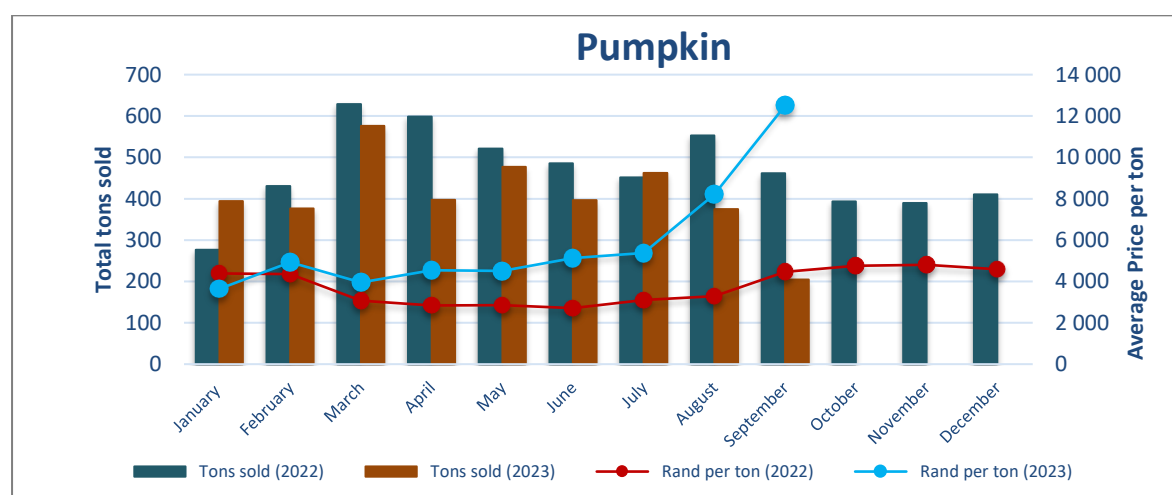
Source: Techno fresh (2023)

10. Pumpkin



A total amount of 204.8 tons of pumpkin was sold at the Cape Town fresh produce markets during September 2023. This presents 45.4% or 170.2-ton decrease from the previous month (August) record of 375 tons. The average market price increased by 52.2% or R4291.5 per ton from R8215.0 in August 2023 to R12506.5 in September 2023. On year and year, basis pumpkin was trading at R4464.4 per ton in September 2022 compared to R12506.5 in September 2023. These results indicate an increase of 180.1% in price per ton of pumpkin between September 2022 and September 2023.

Figure 10: Pumpkin sales on the Cape Town Fresh Produce Market



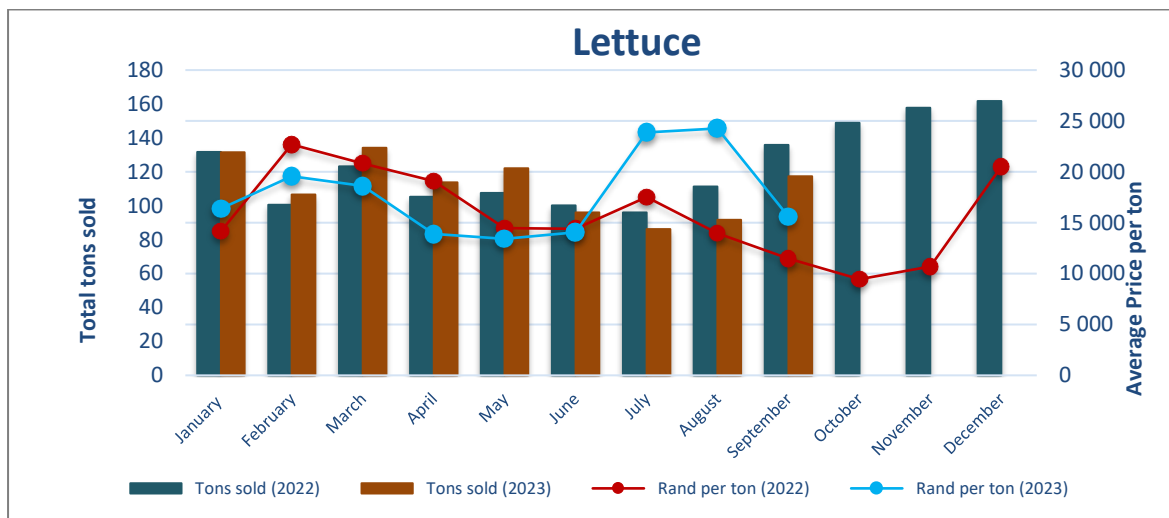
Source: Techno fresh (2023)

11. Lettuce



Figure 11 bellow shows the total volume of lettuce sold at the Cape Town fresh produce market in September 2023. The volume of lettuce sold during September 2023 increased by 28.1% from 91.7 tons in August 2023 to 117.5 tons. The price per ton of lettuce on the other hand, decreased by 35.8% from R24263.8 in August 2023 to R15585.7 in September 2023. On annual basis, lettuce sold at the Cape Town fresh produce market decreased by 13.5% during the period under review. As a result, the volume of lettuce sold decreased from 135.8 tons in September 2022 to 117.5 tons in September 2023. The average market price of lettuce on the other hand increased by 36% or R4122.4 per ton from R11463.3 in September 2022 to R15585.7 in September 2023.

Figure 11: Lettuce squash sales on the Cape Town Fresh Produce Market



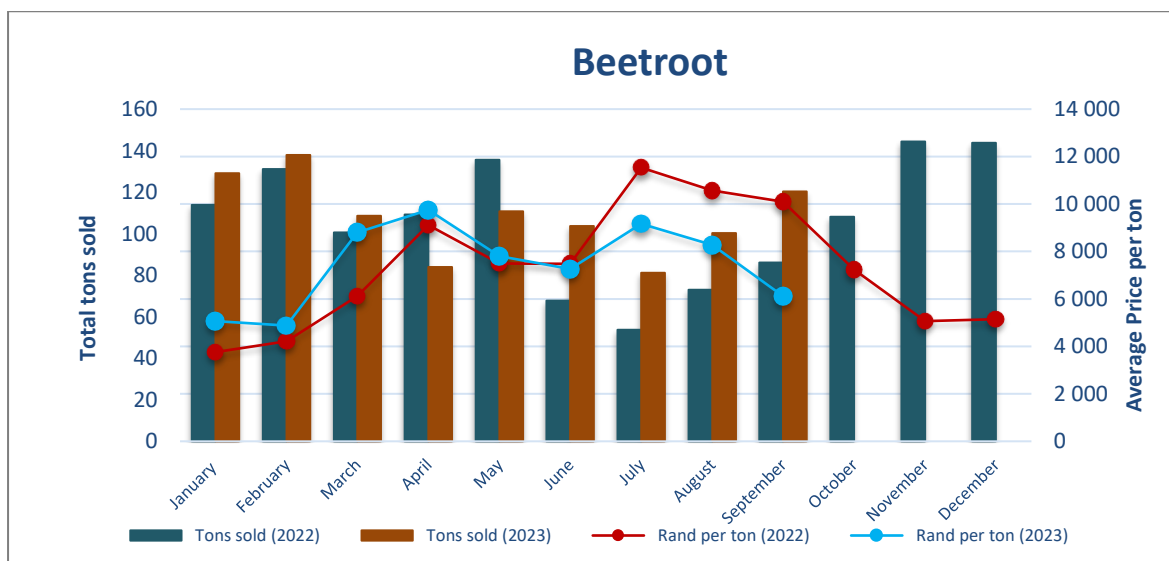
Source: Techno fresh (2023)

12. Beetroot



A total amount of 120.4 tons of beetroot was sold at the Cape Town fresh produce markets during September 2023. This presents 20.1% or 20.2 tons increase from the previous month (August 2023) record of 100.2 tons. The average market price decreased by 26% or R2151.2 from R8271.6 in August 2023 to R6120.4 in September 2023. On year and year, beetroot was trading at R10097.6 in September 2022 compared to R6120.4 in September 2023. These results indicate a decrease of 39.4% in price per ton of Beetroot between September 2022 and September 2023.

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



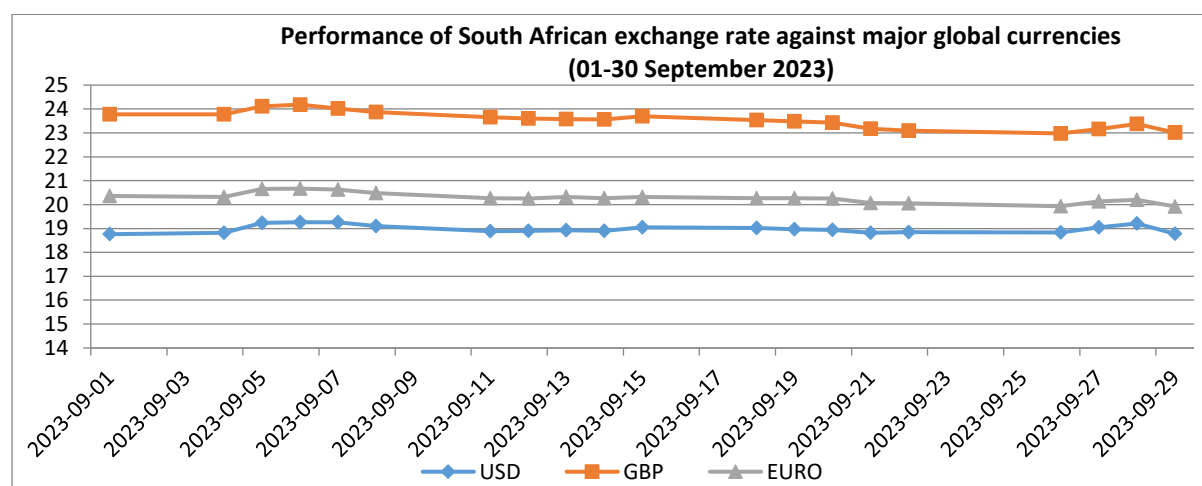
Source: Techno fresh (2023)

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

Product Name highest to the lowest volumes in September 2023	Average tons September 2023 (Ton)	% change in average tons September 2023 (m/m)	Average Price September 2023(Rand/ton)	% change in average price September 2023 (m/m)
Gem squash	76,7	-39,7%	19 067,9	61,8%
Green beans	72,3	-0,1%	24 390,8	-26,3%
Brinjals	50,2	-5,7%	15 732,7	-6,1%
Broccoli	46,2	46,7%	30 842,9	-30,4%
Spinach	45,8	-11,2%	11 400,4	-39,3%
Cauliflower	45,3	23,9%	39 031,3	-19,9%
Sweetcorn	34,0	41,1%	30 159,2	-15,0%
Leeks	22,9	-25,8%	3 981,2	-5,2%
Spring onion	22,4	-10,7%	14 505,5	-22,1%
Baby marrow	21,8	35,2%	23 975,5	-7,8%
Radish	2,6	6,2%	17 685,9	-12,5%
Mushrooms	1,5	-50,0%	85 381,8	12,9%
Patty pans	0,6	-51,7%	31 965,9	24,6%
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 01 September to 2023, looking at month-to-month average of the Rand has weakened against the US Dollar and strengthened against the Great British pound and Euro. The US Dollar was trading at R18.97 in September 2023 compared to R18.76 in August 2023. The Great British pound was trading at R23.55 in September 2023 compared to R23.83 in August 2023. Lastly, Euro was at trading at R20.28 in September 2023 compared to R20.46 in August 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	171,00	cents per litre increase in the retail price	2382,00
Diesel 0.05% Sulphur	284,00	cents per litre increase in the retail price	2233,090
Illuminating Paraffin (Wholesale)	278,00	cents per litre increase the retail price	1 648,558
LPGAS (maximum retail price)	226,00	cents per litre increase in the retail price	2917,00

The Department of Energy has announced fuel price adjustments with effect from 06 September 2023. The price of Petrol 95 ULP & LRP increased by 171 cents, the price of diesel (0.05% sulphur) increased by 284 cents, price of paraffin increased by 278 cents. Lastly, LPGAS's maximum retail price increased by 226 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

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

South African Reserve Bank (SARB): www.sarb.gov.za

South African Revenue Services (SARS): www.sars.gov.za

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

Techno Fresh CRM: www.technofresh.co.za

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

For more information, contact:

The Western Cape Department of Agriculture

Programme: Agricultural Economic Services

Division: Marketing and Agribusiness

Tel: 021 808 5193 or 7753

E-mail: Tshifhiwa.Labase@westerncape.gov.za

DISCLAIMER: The Western Cape