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**Market Intelligence Report**  
**Potato Industry in South Africa**  
**2024**

# Market Intelligence Report: SA Potato Industry 2024

**Western Cape Government**

**Department of Agriculture**

**Programme: Agricultural Economics Services**

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# Executive Summary

The South African (SA) potato industry identified foreign market development as a critical growth strategy to pursue between 2020 and 2025 (Potatoes SA, 2022). This report offers a comprehensive analysis of the SA potato industry, with a specific focus on the Western Cape (WC) province. SA ranked 39<sup>th</sup> globally in potato production in 2022. Regionally, SA maintained its position as the 10<sup>th</sup> largest potato producer and constitute 15% of exports in Africa.

## Key Statistics and Trends

From 2000 to 2022, global potato production increased by 16.1%, reaching 374.7 million tons. During the same period, African potato production rose significantly by 106% to 27.1 million tons, while SA's production grew by 49% to 2.5 million tons. The value of global gross potato production surged by 210% to \$119.3 billion, with Africa's production value increasing by 273% to \$9.2 billion and SA's by 210% to \$599.9 million.

Productivity and prices also saw changes, with global productivity improving by 30% to 21.1 tons/ha and export prices rising by 100% to \$333/ton. African productivity increased by 42% to 14.9 tons/ha, and SA's productivity grew by 19% to 37.8 tons/ha, the highest in the region, while export prices increased by 16% to \$260/ton.

Export trends showed global potato exports increasing by 104% to 15.8 million tons and SA's potato exports growing by 835% to 185.2 thousand tons. However, WC potato exports dropped by 46% from R126 million in 2014Q4 to R67 million in 2023Q4, with notable declines in exports to Angola and Botswana, but a surge in potato exports to the UAE by 1,888% from 2013 to 2023.

Market dynamics revealed that fresh produce market potato sales in formal markets dropped from 48% (935 thousand tons) in 2010 to 44% (1.1 million tons) in 2022, and potato consumption per capita was lowest in 2016 at 33.5 kg and highest in 2018 at 38.5 kg. In the WC, 9.8% of potatoes sold in fresh produce markets were downgraded mainly due to mechanical damage, compared to Limpopo's highest downgrade rate of 20%.

Small-scale farmers face significant challenges with old and poor-quality seeds, price instability, and limited access to higher-value markets. Black producers contribute about 10% of agricultural outputs, with more than 400 hectares of potatoes cultivated by black commercial producers under the enterprise development program.

## Implications and Recommendations

- **Strategic Expansion:** Given the growing population and increasing popularity of potatoes, the WC has significant potential for expanding production. This is crucial as many SADC countries depend on SA potatoes.



- **Addressing Market Barriers:** SA should seek to establish preferential trade agreements, particularly with Angola, to reduce tariffs and regain lost market share. Research is needed to identify and address the factors causing declines in specific markets.
- **Infrastructure and Support:** Enhanced transportation links and storage facilities are essential to expand market access and reduce transportation costs. Investments in these areas can help stabilize prices and avoid market saturation.
- **Support for Small-Scale Farmers:** Continued support for small-scale farmers through equitable access to inputs, market information, and extension services is critical.
- **Regional Integration:** SA's role within the SADC and the African Continental Free Trade Area is pivotal. Developing regional value chains can bolster the agricultural sector and improve food security.

The WC remains a vital player in SA's potato industry, contributing significantly to both domestic consumption and export markets. While the province faces challenges, particularly in maintaining market share in countries like Angola and Botswana, there are opportunities for growth.

# 1. Introduction

The Food and Agriculture Organization (FAO) declared 2008 as the international year of the potato, recognising its global significance as a food crop that is crucial for achieving the Sustainable Development Goals. In 2021, the FAO proclaimed the International Year of Fruits and Vegetables, underscoring the importance of the potato industry in combating nutritional deficiencies and poverty. The potato is a popular, nutritious staple in the developing world, with China and India leading in production. It ranks among the top four global crops, following maize, wheat, and rice (FAO, 2022).<sup>1</sup> In terms of yield, the potato surpasses the other top crops, with an average yield of 21.1 tons per hectare in 2022, compared to maize's 5.7 tons per hectare, wheat's 3.7 tons per hectare, and rice's 4.8 tons per hectare (Potatoes SA, 2024e). Approximately 1.3 billion people worldwide consume potatoes, with an average consumption exceeding 50 kg per person annually (Devaux *et al.*, 2021).<sup>2</sup> Potato production is increasingly shifting towards developing regions. However, despite its significance, potato production has not kept pace with the global population growth of 11.6% in recent years (Potatoes SA, 2024e). In 2022, a study by the International Trade Centre (ITC) identified the potato industry as one of the commodities that could help reduce imports of food preparations for infant use, which are projected to exceed €1.1 billion by 2026. It is also considered one of the 94 promising value chains for regional integration in Africa (ITC, 2022). The study found that Egypt, Ghana, and South Africa (SA) are competitive exporters of infant food, with SA potatoes showing an export potential above \$10 million and had a relative comparative advantage. The SA potato industry identified foreign market development as a critical growth strategy to pursue between 2020 and 2025 (Potatoes SA, 2022). Consequently, this market intelligence report aims to provide an overview of the potato industry with a specific focus on the Western Cape (WC). In 2011, the largest areas allocated for potato production were in the Eastern Free State (19%), Limpopo (18%), and the Sandveld region in the WC (13%) (DAFF, 2012).<sup>3</sup> This report analyses the production and trade performance of the potato industry using time series data from 2000 to 2023. It does not cover the input market for potatoes, the french-fries market, or other related processed potato products.

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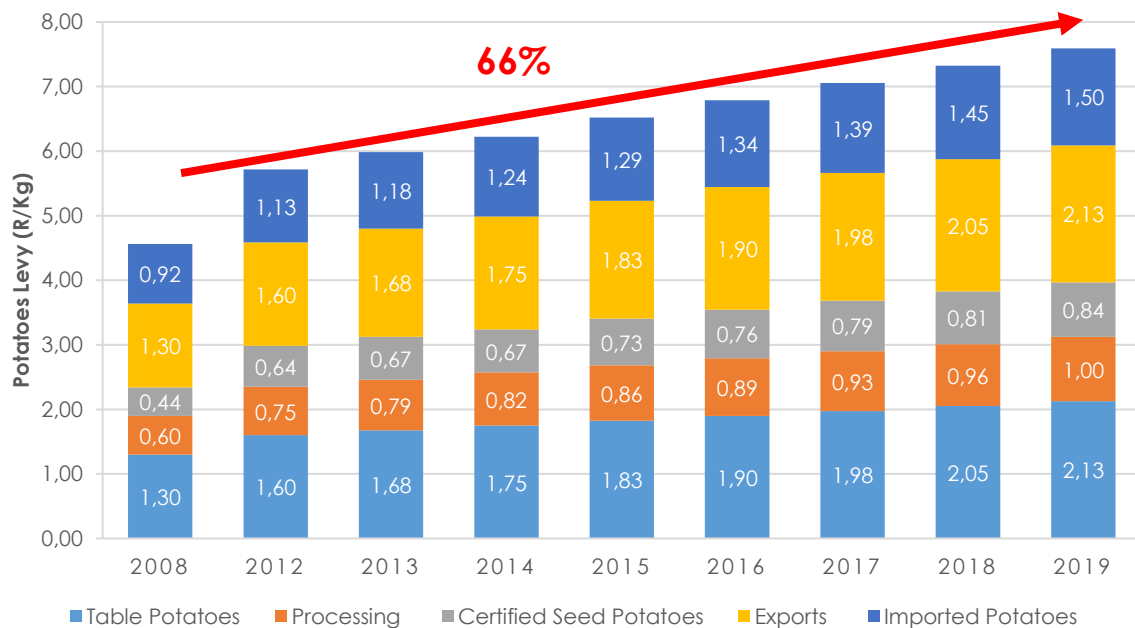
<sup>1</sup> In 2017, potatoes were top 3 in SA after maize and sugar cane, and they were top 8 in the WC (Stats SA, 2020).

<sup>2</sup> In 2022, SA gross human consumption of potatoes was two million tons or 35.38kg per capita (DALRRD, 2023).

<sup>3</sup> In 2018, Sandveld contributed 5 498 hectares (10%) out of 53 011 hectares (80-92% under irrigation) (DAFF, 2019).

## 2. Background

The potato industry plays an important role in the SA society (the 'Potato Nation') and the world both economically and socially. In 2021, the SA potato industry generated approximately R8 billion at the primary production level and about R25 billion at the secondary level (Potatoes SA, 2021). The levy income for the sector increased from R23 million in 2008 to R48 million in 2022 but the levy income as a percentage of the product value decreased from 0.52% to 0.4% (NAMC, 2008, 2022).<sup>4</sup> In 2022, a significant portion of the levy income was allocated to transformation efforts, amounting to R12.9 million (a 171% increase from 2009), followed by consumer education and promotion at R12.2 million (a 105% increase from 2009), and research on cultivar development at R12.1 million (a 286% increase from 2009). Figures 2.1 and 2.2 illustrate the levy charges within the value chain over time and the potato value chain. Overall, the levies have increased by 66% from 2008 to 2019.

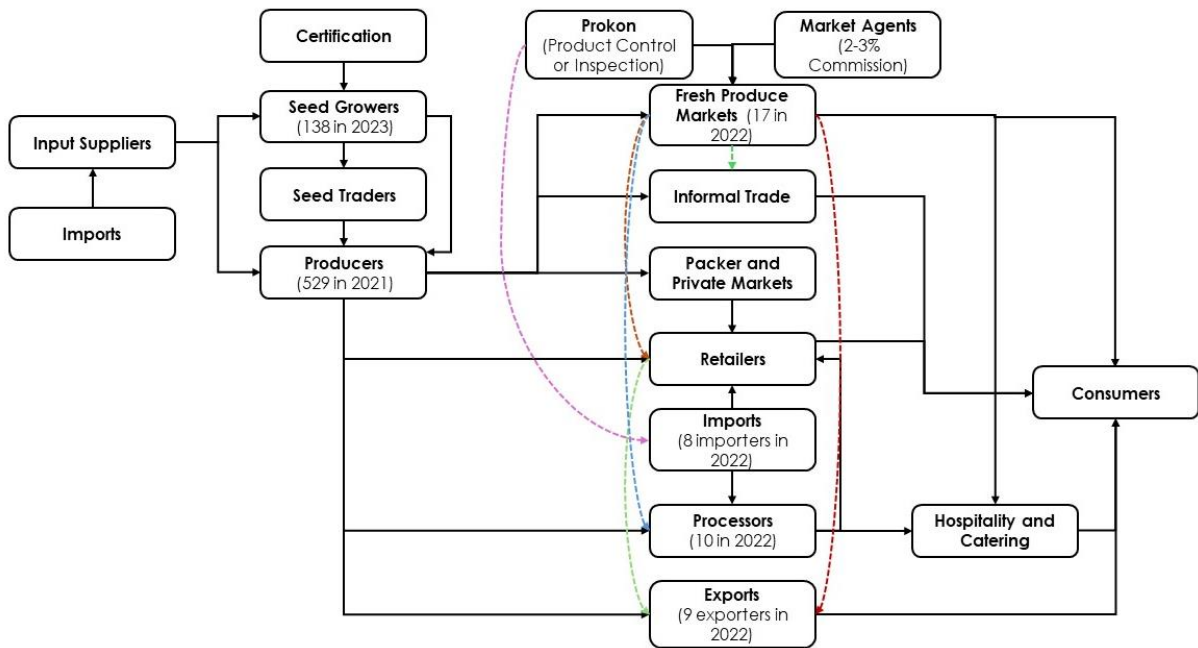


**Figure 2.1. Statutory levies charged within the potato value chain**

Source: Own compilation based on NAMC Statutory Levy Reports (2008; 2010; 2021; 2022)

<sup>4</sup> Maximum levy that can be charged according to the MAP Act is 5%.





**Figure 2.2. The South Africa potato value chain**

Source: Adapted from DAFF (2012) and NAMC (2022)

The number of commercial table potato producers decreased from 1,700 in 2003 to 513 in 2021, small scale producers decreased from 373 in 2008 to 16 in 2021 and the number of registered potato seed growers declined from 400 in 2000 to 138 active growers in 2023 (DALRRD, 2003; DAFF, 2012; NAMC, 2008, 2021; PCS, 2023). The industry employs approximately 50-60 thousand people at the primary level, down from 66.6 thousand farmworkers in 2003 (DALRRD, 2003; Potatoes SA, 2021).<sup>5</sup> The Agriculture and agro-processing master plan estimates potential employment creation of 15,715 jobs supporting 115,715 livelihoods by 2030 (DALRRD, 2022). Transformation remains a challenge for the industry, with black-owned farms contributing only 1% of the industry's value (Arnoldi, 2021). Employment in processing firms varies, with each firm employing between 170 and 380 workers (NAMC, 2017). In 2017, there were around three thousand small or subsistence potato growers (Yzel, 2017). In 2022, the industry included five bag manufacturers, eight importers (up from five in 2010), nine exporters (down from 13 in 2010), 10 processors (down from 11 in 2010), and 17 fresh produce markets (down from 23 in 2010) (NAMC, 2010, 2022).

Processors use potatoes to produce french-fries, crisps, and frozen products. In 2022, the potato processing sector accounted for 18.8% (up from 17% in 2011) of the total potato crop, with 91% (down from 98%) of this being converted into dry, frozen, and fresh chips (DAFF, 2012; DALRRD, 2023b). The SA potato sector is protected from imports by the International Trade Administration Commission (ITAC), which in 2023 imposed definitive tariffs on frozen french-fry

<sup>5</sup> According to an industry expert, the WC has about 82 farmers and the industry gives work to about +- 10,000 people.

imports, particularly from Belgium (58%) and the Netherlands (17%) to safeguard jobs in South Africa (Edwards *et al.*, 2022; Potatoes SA, 2023a). Recently, global concerns have emerged about potato products such as french-fries, hash browns, and potato chips, which, when cooked at high temperatures, contain a carcinogenic substance and a neurotoxin called acrylamide, particularly noted in the US (McFadden and Huffman, 2017). This challenge is being addressed through the development of new potato varieties. In SA, less than five varieties make up 90% of the potatoes planted, despite the national variety list featuring 133 different options, including organic and non-genetically modified organism varieties (Potatoes SA, 2024a).<sup>6</sup>

The potato sector faces numerous challenges, including high input costs, price volatility, climate change impacts, seasonality, pests and soil-borne diseases, and market access issues. SA is a net importer of fertilizers and chemicals, making the sector susceptible to exchange rate fluctuations. Historically, SA's demand for fertilizers was about two million tons per annum, with 70% being imported (NAMC, 2017). In the 2022/23 season, potato producers spent over R1 billion on crop protection, but are now under pressure from the European Green Deal and the Globally Harmonized System for classification and labelling of crop protection products (Potatoes SA, 2024f). The industry is increasingly adopting sustainability initiatives to reduce water usage and minimize pesticide application, which is becoming a key part of its marketing strategy (Potatoes SA, 2024g). The black farmers rely on informal traders and face additional market access hurdles, with these traders purchasing 36% of the total crop (DAFF, 2012; Ferreira, 2017; Arnoldi, 2021). While export markets add to the total demand for SA potatoes, challenges include meeting quality standards, phytosanitary measures, market competition, border closures or import bans, import licensing requirements, and logistical issues (Potatoes SA, 2019; 2022; 2024b). Additionally, more than 35% of low-grade potatoes are currently wasted and this suggests potential for improvement (Potatoes SA, 2023b).

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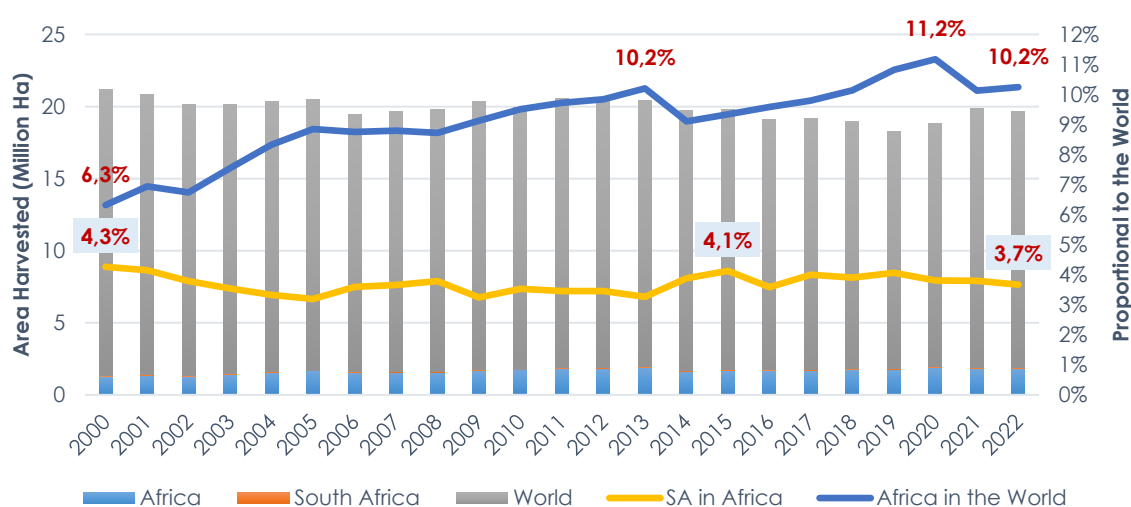
<sup>6</sup> In the East African Community (EAC), utilizing quality seed potatoes could boost yields from 8 tons per hectare to 20-40 tons per hectare. Despite 138 registered and released potato varieties by EAC member states, farmers only use 41 varieties (Sharma and Atieno, 2022). Additionally, only 5% of these 138 varieties are suitable for processing.

## 3. Global Production and Trade

### 3.1 Global Production Analysis

#### 3.1.1 Global Production Area Relative to SA

Globally, the top potato-producing countries are China, India, the Russian Federation, Ukraine, and the United States. In the regional context, Nigeria, Egypt, Kenya, and Algeria lead in potato production. In 2022, SA was ranked 39<sup>th</sup> globally (an improvement from 49<sup>th</sup> in 2000) and 10<sup>th</sup> regionally in terms of harvested area (see Tables 2 and 3 in the rankings appendix). Figure 3.1 illustrates the global area used for potato production. Over the past two decades, the global area allocated to potato cultivation has decreased by 10.6%, from 19.8 million hectares in 2000 to 17.7 million hectares in 2022. Conversely, Africa and SA have increased their potato cultivation areas by 45% (to 1.8 million hectares in 2022) and 24.8% (to 66.8 thousand hectares in 2022), respectively, over the same period. SA's share of Africa's potato cultivation has remained stable at around 3.3% to 4.3% over the past two decades, while Africa's share of global potato cultivation has risen from 6.3% in 2000 to 10.2% in 2022. As of 2022, nearly 80% of SA's potato-growing area was irrigated (DALRRD, 2023b).



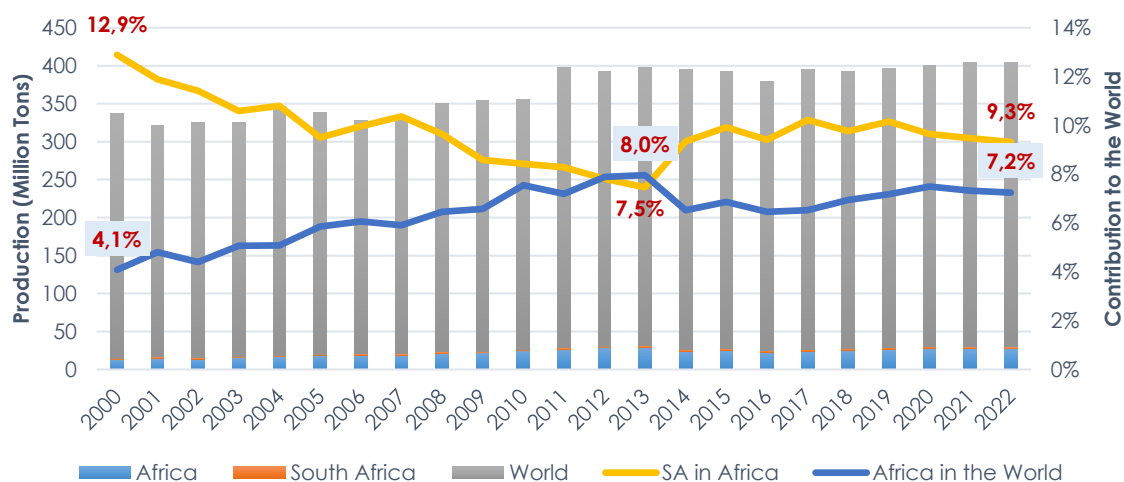
**Figure 3.1. Global potato production area in hectares**

Source: Own compilation based on FOASTAT, 2024

#### 3.1.2 Global Production Tons Relative to SA

Figure 3.2 depicts global potato production. From 2000 to 2022, global potato production increased modestly by 16.1% to 374.7 million tons. In contrast, Africa and SA saw significant growth, with increases of 106% (to 27.1 million tons) and 49% (to 2.5 million tons), respectively. Africa's share of global production rose from 4.1% in 2000 to 7.2% in 2022, while SA's share of

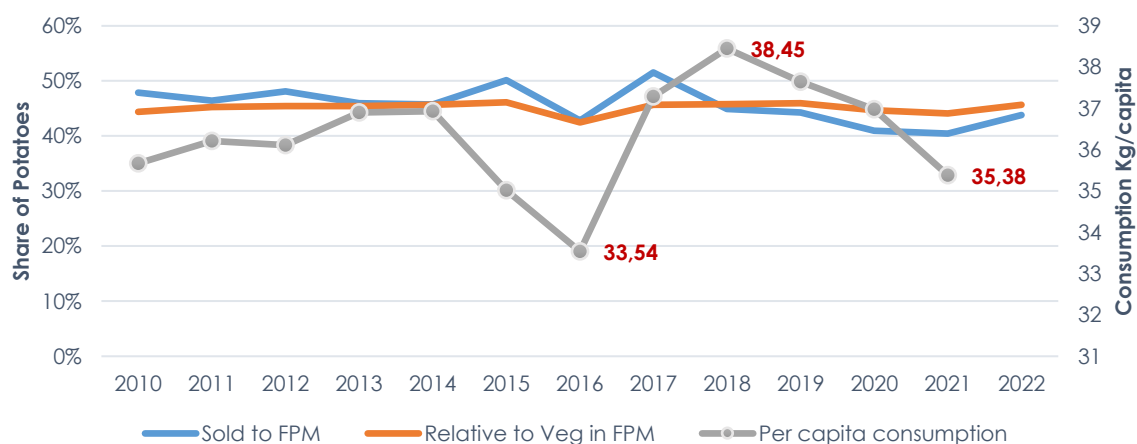
African production declined from 12.9% to 9.3% over the same period. Nonetheless, SA improved its global production ranking from 29<sup>th</sup> in 2000 to 26<sup>th</sup> in 2022 and maintained its 3<sup>rd</sup> place ranking regionally (see Tables 4 and 5 in the rankings appendix). In 2007, potato consumption in SA was relatively low at 31 kg per capita, compared to 87.8 kg per capita in Europe (NAMC, 2017).



**Figure 3.2. Global potato production in tons**

Source: Own compilation based on FOASTAT, 2024

Figure 3.3 depicts the proportion of potatoes sold in formal markets or fresh produce markets and their consumption. The share of potatoes sold in these markets has decreased from 48% (935 thousand tons) in 2010 to 44% (1.1 million tons) in 2022. The potatoes sold in fresh produce markets are predominantly of the Mondial variety, followed by Sifra. Despite the decline in the share sold in these markets, potatoes' share relative to other vegetables has remained stable at 44%. Potato consumption per capita reached its lowest point in 2016 at 33.5 kg and peaked in 2018 at 38.5 kg.

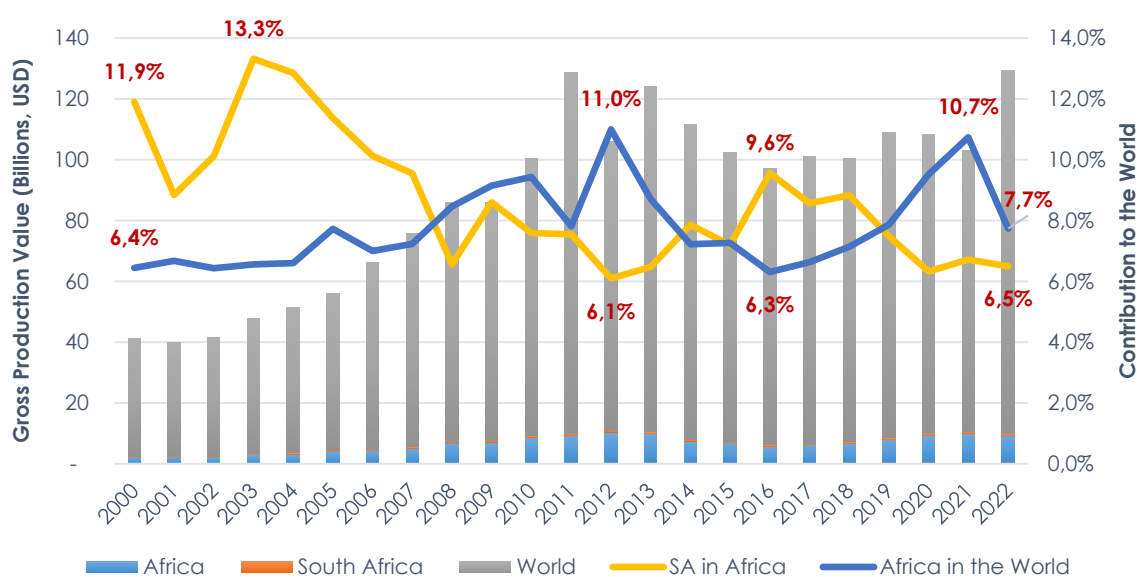


**Figure 3.3. Share of potatoes sold in fresh produce markets and consumption**

Source: Own compilation based on DALRRD, 2023a

### 3.1.3 Global Production Value Relative to SA

Figure 3.4 outlines the global patterns in potato production value. Over the past two decades, there has been a significant increase in the gross production value of potatoes worldwide, in Africa and SA, with growth rates of 210% (reaching \$119.3 billion), 273% (reaching \$9.2 billion), and 210% (reaching \$599.9 million), respectively. However, SA's share of the African potato production value declined from 11.9% in 2000 to 6.5% in 2022, while Africa's share of the global production value increased from 6.4% to 7.7%. Similarly, SA's ranking based on gross production value dropped from 2<sup>nd</sup> to 3<sup>rd</sup> place regionally but improved from 24<sup>th</sup> to 23<sup>rd</sup> place globally over the same period (see Tables 8 and 9 in the rankings appendix). Potatoes contributed 3.4% (or R21.9 billion) of consumption expenditure on food in 2018 and 9.1% (or R9.1 billion) of horticulture products' gross production value in 2022 (DALRRD, 2023a).



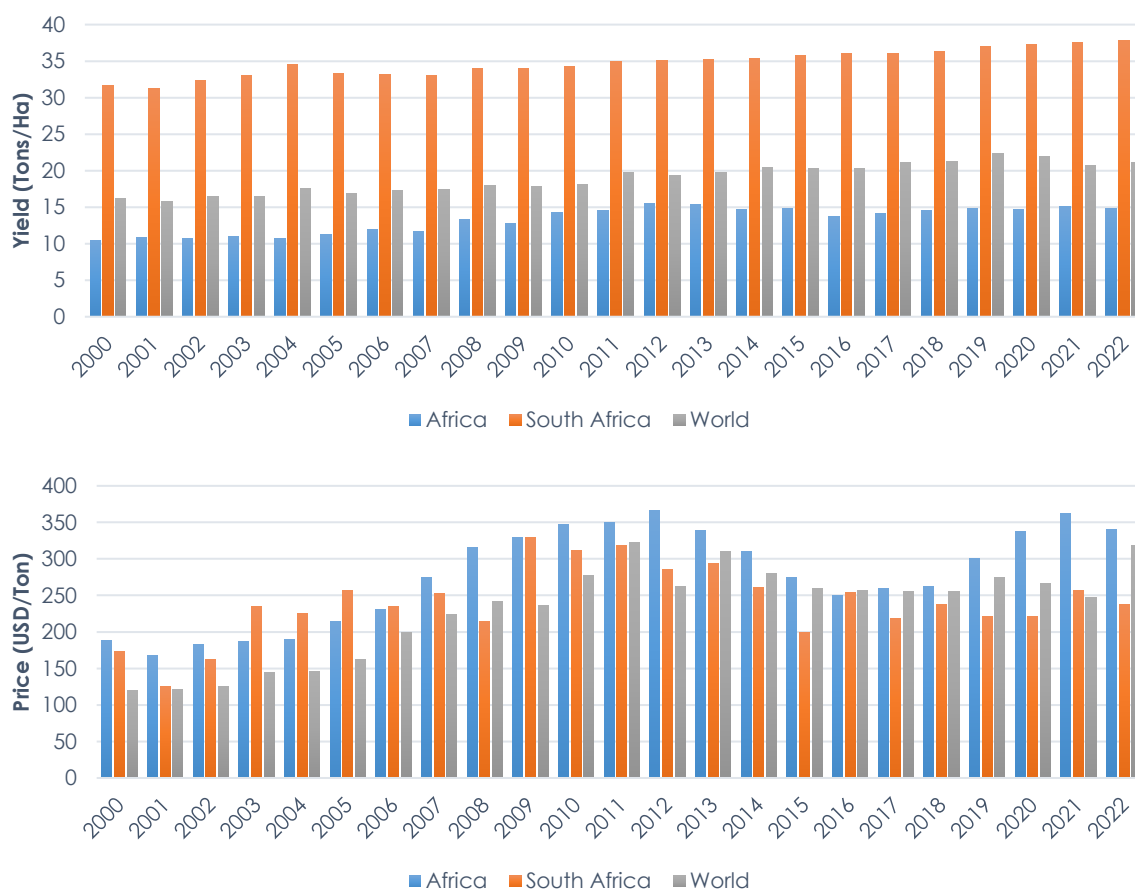
**Figure 3.4. Global trends in potato production value**

Source: Own compilation based on FOASTAT, 2024

### 3.1.4 Global productivity and prices relative to SA

Figure 3.5 illustrates the global trends in potato production productivity and prices. Over the past two decades, productivity, measured in tons per hectare, has shown significant improvements, increasing by 30% to 21.1 tons per hectare globally, 42% to 14.9 tons per hectare in Africa, and 19% to 37.8 tons per hectare in SA. Notably, SA exhibits the highest productivity, surpassing both the African and global averages. According to Potatoes SA (2024a), small-scale farming sectors achieve yields averaging around 10-20 tons per hectare, while commercial producers achieve an average yield of 47 tons per hectare. In terms of potato prices per ton, there has been a substantial increase over the past 20 years, rising by 167% to \$318 per hectare globally, 81% to \$340 per hectare in Africa, and 37% to \$237 per hectare in SA. Despite SA's high productivity, its prices are relatively lower compared to Africa, where productivity is

lower but prices per ton are higher. SA maintains its first place ranking regionally based on yield but has dropped from 13<sup>th</sup> to 14<sup>th</sup> place globally, although it remains relatively high (see Tables 6 and 7 in the rankings appendix).



**Figure 3.5. Global productivity trends of potato production and prices**

Source: Own compilation based on FOASTAT, 2024

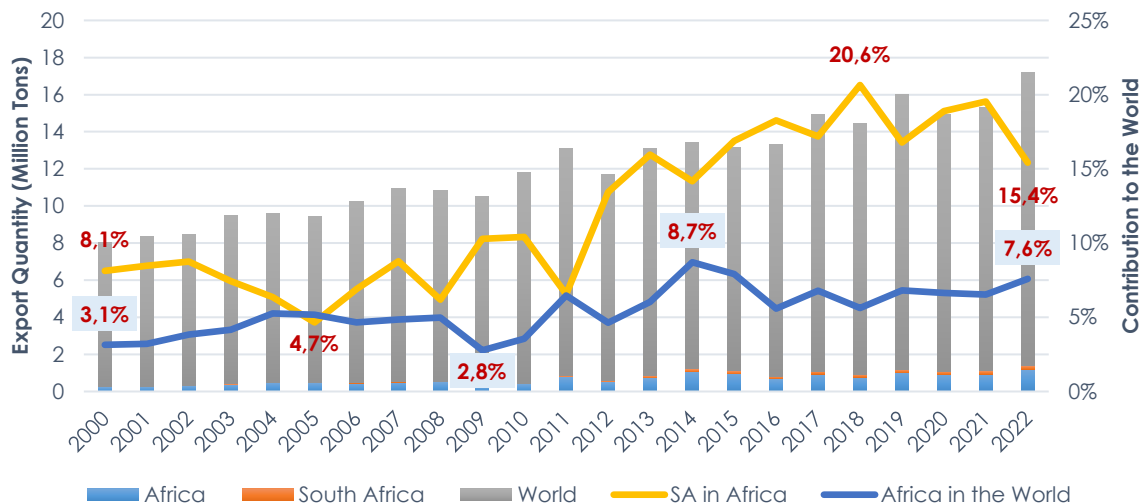
## 3.2 Global Trade Analysis

### 3.2.1 Fresh or Chilled Potato Export and Imports

Figure 3.6 depicts the global potato export quantities and the contribution of SA. Over the past two decades, there has been a significant increase in the quantity of potato exports, with growth rates of 104% (reaching 15.8 million tons in 2022) globally, 393% (reaching 1.2 million tons) in Africa, and 835% (reaching 185.2 thousand tons) in SA.<sup>7</sup> SA's contribution to Africa's export quantity rose from 8.1% in 2000 to 15.4% in 2022, while Africa's contribution to the world's export quantity also increased from 3.1% to 7.6%.

<sup>7</sup> SA only exports 8,0% of total local potato production.

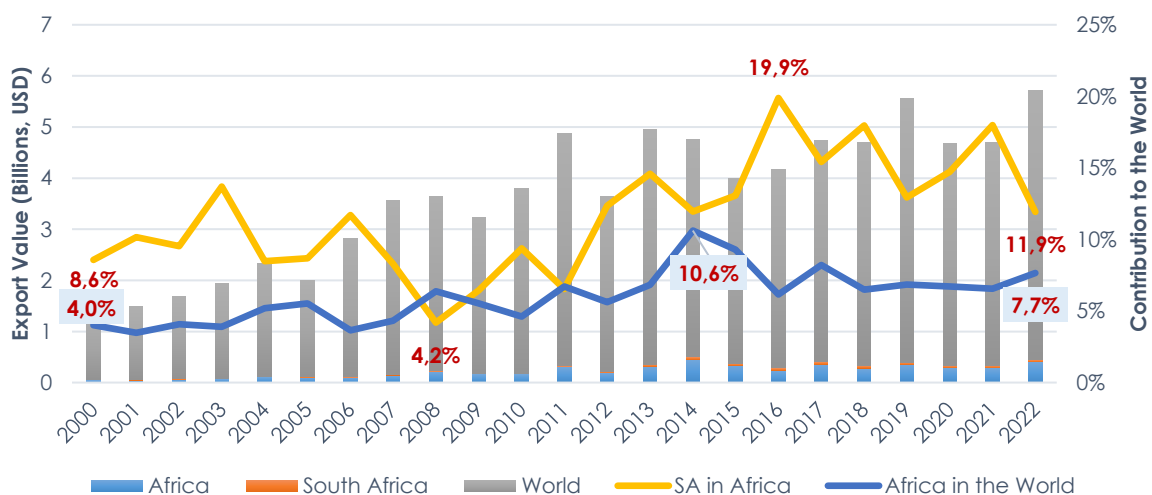




**Figure 3.6. The quantity of global potato exports and the contribution of SA**

Source: Own compilation based on FOASTAT, 2024

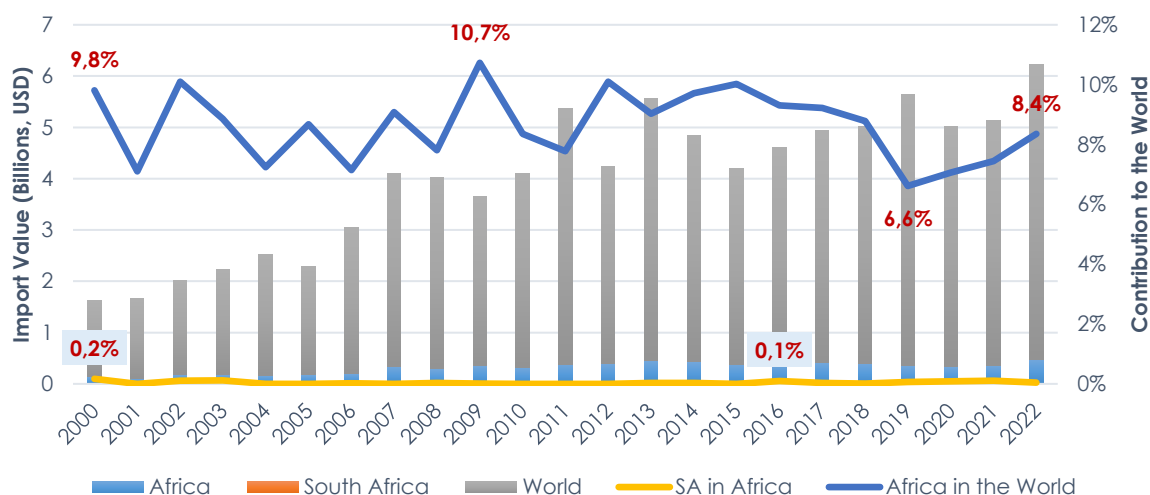
Figure 3.7 illustrates the value of global potato exports and the contribution of SA. Over recent years, there has been a significant increase in the value of global potato exports, with growth rates of 309% (reaching \$5.2 billion in 2022) globally, 681% (reaching \$403.2 million) in Africa, and 988% (reaching \$48.1 million) in SA. SA's contribution to Africa's export value increased from 8.6% in 2000 to 11.9% in 2022, while Africa's contribution to the world's export value also increased from 4% to 7.7% over the same period. Similarly, SA improved its export ranking in value, achieving 2<sup>nd</sup> place regionally (up from 3<sup>rd</sup> place) and 16<sup>th</sup> place globally (up from 30<sup>th</sup> place) in 2022 (see Tables 10 and 11 in the rankings appendix). SA's improved ranking in both regional and global potato export value suggests increased competitiveness in the international market which could be due to improved quality standards, better infrastructure, and effective trade policies.



**Figure 3.7. The value of global potato exports and the contribution of SA**

Source: Own compilation based on FOASTAT, 2024

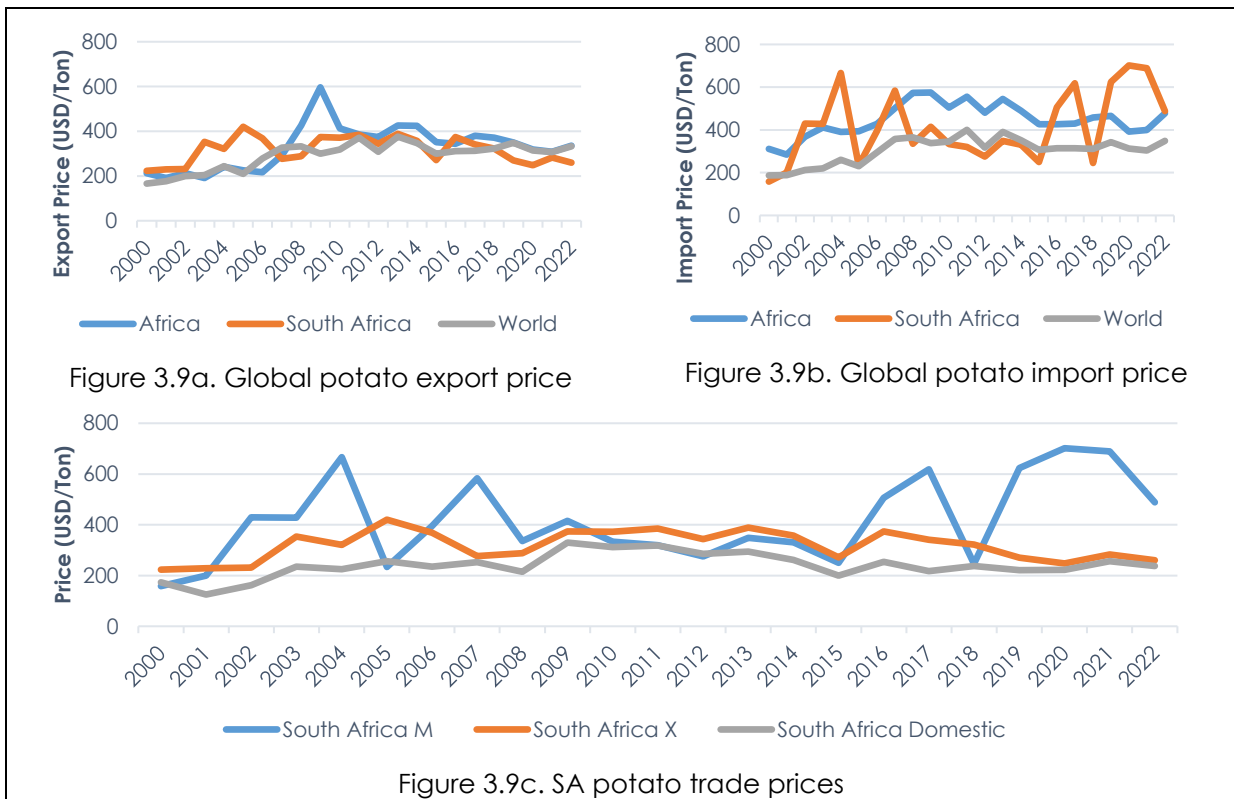
Figure 3.8 depicts the value of global potato imports and SA's contribution. Over recent years, there has been a significant increase in the import value globally and in Africa, rising by 287% to \$5.7 billion and 229% to \$479.7 million, respectively. However, SA's import value decreased by 12% to \$216 thousand. The proportion of Africa's imports relative to the world has slightly declined from 9.8% in 2000 to 8.4% in 2022, while SA's imports relative to Africa remain minimal, at 0.05% in 2022. Notably, SA operates as a net exporter of potatoes.



**Figure 3.8. The value of global potato imports and the contribution of SA**

Source: Own compilation based on FOASTAT, 2024

Figure 3.9 illustrates the trends in global and SA potato trade prices. From 2000 to 2022, export prices increased by 100% to \$333 per ton globally, 58% to \$336 per ton in Africa, and 16% to \$260 per ton in SA. Between 2001 to 2004 and 2019 to 2022, there was a convergence of world export prices with African export prices, indicating price transmission from the global market to the region. South African export prices were higher than both world and African export prices between 2000 to 2007 and lower from 2018 to 2022. Transport costs contribute to the high export prices, which may prompt consumers in importing countries to switch to substitutes (NAMC, 2017). Global import prices increased at a relatively faster rate, reaching 86% to \$349 per ton globally, 53% to \$478 per ton in Africa, and 209% to \$489 per ton in SA. In SA, domestic potato prices for producers have generally been lower than export and import prices, with domestic and export prices showing signs of convergence in recent years.

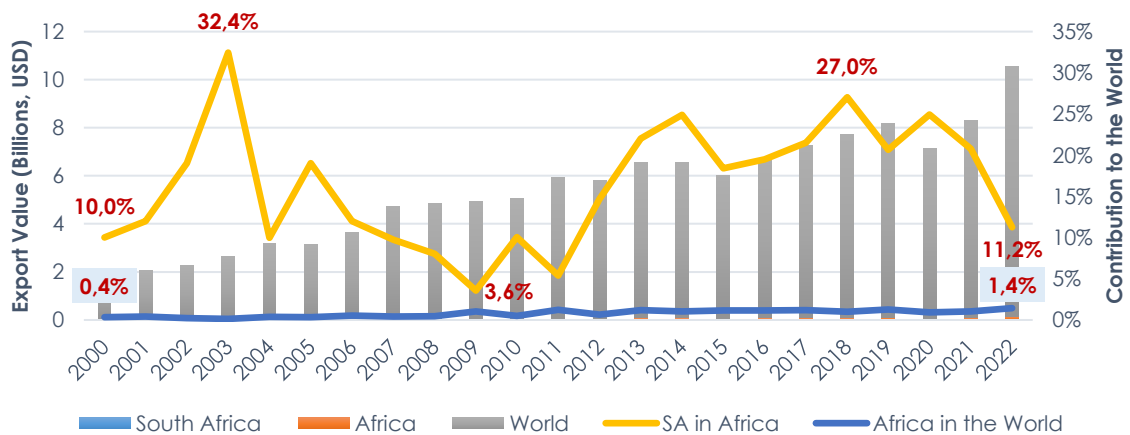


**Figure 3.9. Global and SA potato trade prices**

Source: Own compilation based on FOASTAT, 2024

### 3.2.2 Frozen Potato Exports and Imports

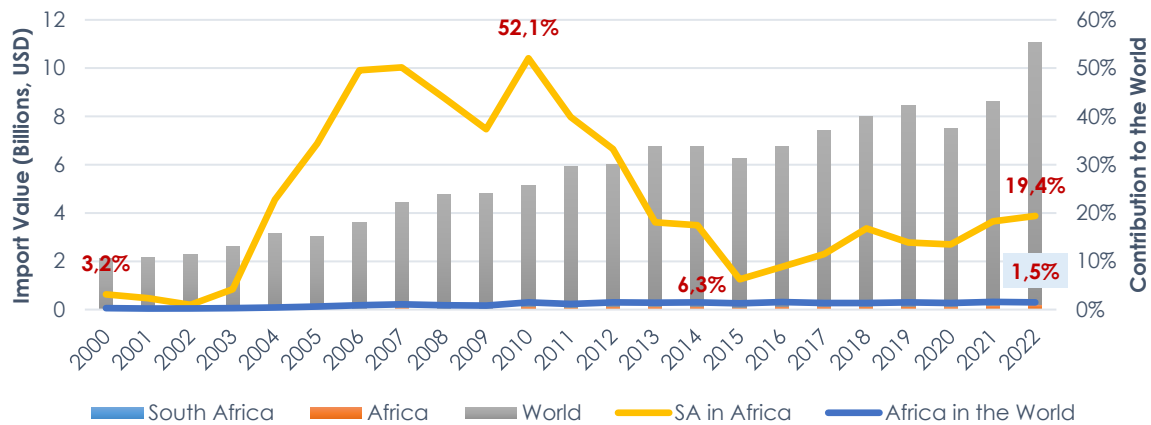
Figure 3.10 illustrates the growth in global frozen potato exports and SA's role in this market. Over time, the export value for frozen potatoes has surged significantly: globally by 442% (reaching \$10.3 billion), in Africa by 2,075% (reaching \$148.8 million), and in SA by 2,347% (reaching \$16.7 million). However, SA's contribution to the African frozen potato market has declined from its peak of 32% in 2003 to 11% in 2022, while Africa's contribution to the global market has risen from 0.1% to 1.4% during the same period.



**Figure 3.10. The value of global frozen potato exports and the contribution of SA**

Source: Own compilation based on FOASTAT, 2024

Figure 3.11 provides insights into the global frozen potato market and SA's role within it. Over the years, the import value for frozen potatoes has surged significantly: globally by 415% (reaching \$10.8 billion), in Africa by 2,325% (reaching \$161.3 million), and in SA by 14,800% (reaching \$31.2 million). Notably, SA's contribution to the African frozen potato market has risen from 3.2% in 2000 to 19.4% in 2022, while Africa's contribution to the global market has increased from 0.3% to 1.5% during the same period. SA was a net importer of frozen potatoes from 2004-2012, 2014, and 2021-2022.



**Figure 3.11. The value of global frozen potato imports and the contribution of SA**

Source: Own compilation based on FOASTAT, 2024

Figure 2.12 shows the patterns in global frozen potato trade prices. Export prices for frozen potatoes have notably risen in recent years, increasing by 77% to \$109 per ton globally, 113% to \$99 per ton in Africa, and 225% to \$123 per ton in SA (see Figure 2.12a). Since 2008, SA export prices have consistently surpassed the global and African averages, peaking at \$172 per ton in 2011. Additionally, frozen potato import prices have seen significant increases, rising by 75% to \$1,155 per ton globally, 144% to \$975 per ton in Africa, and 105% to \$957 per ton in SA (see Figure 2.12b). SA import prices tend to exhibit more fluctuations compared to Africa's prices. Generally, SA import prices have remained lower than global and African import prices, except for the years 2016 and prior to 2003.

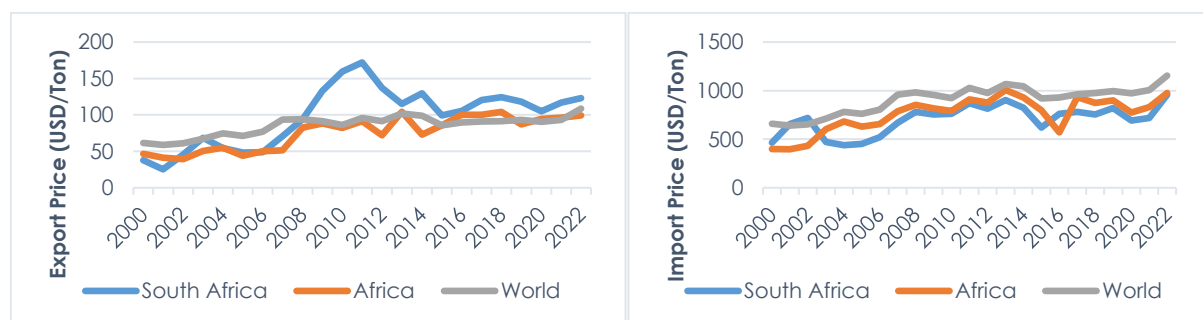


Figure 3.12a. Frozen potato export price

Figure 3.12b. Frozen potato import price

**Figure 3.12. Global frozen potato trade prices**

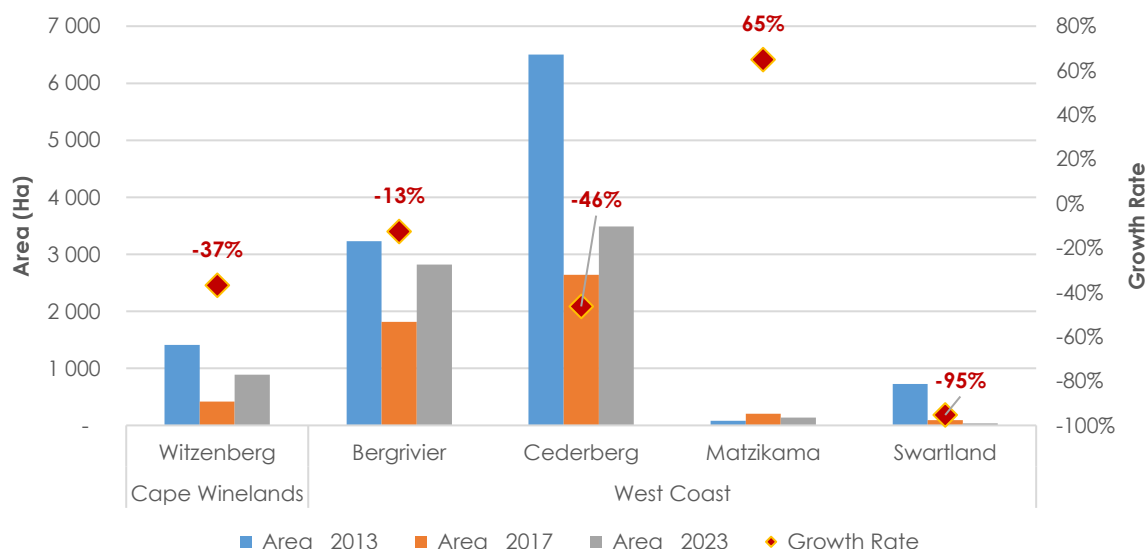
Source: Own compilation based on FOASTAT, 2024

# 4. Western Cape Production and Trade

## 4.1 Western Cape Production Analysis

### 4.1.1 Potato Land Distribution in the WC

Figure 4.1 illustrates the distribution of potato-growing land by district from 2013 to 2023. The land allocated to potatoes in the WC declined by 39% from 12.3 thousand hectares in 2013 to 7.4 thousand hectares in 2023. Most land dedicated to potato farming is in the Cederberg municipality within the West Coast. Although Matzikama has less land allocated to potato production, it has seen a significant growth rate of 65% in land allocation for potatoes. According to flyover data estimates, WC farmers yield approximately 45 tons of potatoes per hectare, with the average price per ton rising from R3 thousand in 2013 to R7.1 thousand in 2023.



**Figure 4.1. WC potato land distribution by district**

Source: Own compilation based on WCDOA (Flyover data), 2024

### 4.1.2 Potato Sales in Cape Town Fresh Produce Market

In SA, fresh produce markets (17) play a crucial role in price determination. When prices rise, consumers respond by adjusting their purchasing behaviour, opting for smaller packaging sizes of 7kg and 5kg potatoes or turning to alternative products like sweet potatoes (NAMC, 2017). In 2012, the Cape Town fresh produce market accounted for the third-largest share of the potato market at 10% (which decreased to 8.2% in 2023, ranking fourth). The average price of potatoes in this market was R78.28 per 10kg, compared to Johannesburg's market share of 41% (ranked first) with an average price of R72.45 per 10kg. Informal traders were responsible for distributing 53% of all fresh potatoes sold (DAFF, 2012; Potatoes SA, 2024d). In 2022, most

potatoes were sold at fresh produce markets (44%), followed by direct trade (22%), processing (19%), exports (8%), and seed (7%) (DALRRD, 2023b). Figure 4.2 illustrates three-year trends in monthly potato sales at the Cape Town Fresh Produce Markets from 2021 to 2023. Sales volumes increased in March, May, September, and October, remained relatively stable in January, June, and August, and declined in February, April, July, November, and December. Potato prices reached their peak in March and September in 2021 and in September and November in 2023.



**Figure 4.2. Potatoes monthly sales at the Cape Town Fresh Produce Market**

Source: Own compilation based on Cape Town Fresh Produce Market, 2024

### 4.1.3 Potato Quality Inspections in Fresh Produce Markets

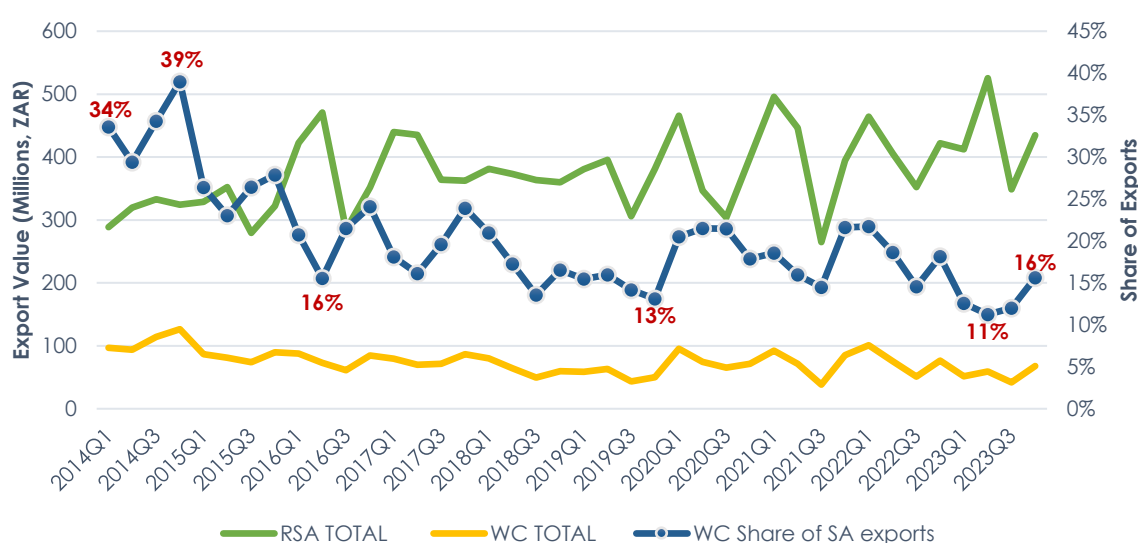
Potatoes in fresh produce markets are categorized into four classes, from the lowest class to Class 3. In 2021, 94.3 million bags were inspected in fresh produce markets, with 81% classified as Class 1 and 14% as Class 2 (PROKON, 2022). That year, 7 million bags were downgraded to Class 2 and 1.6 million bags to Class 3. By 2022, inspections rose to 133.6 million bags, with 84% in Class 1 and 12% in Class 2. During this period, 10.7 million bags were downgraded to Class 2 and 3.9 million bags to Class 3. In the WC, 10% of potatoes were downgraded in 2021 and 9.8% in 2022, primarily due to mechanical damage. Limpopo experienced the highest downgrade rates, with 19% in 2021 and 20% in 2022. The downgrade has implications for potato prices that farmers receive for their produce.



## 4.2 Western Cape Trade Analysis

### 4.2.1 SA Potato Exports by Province

Figure 4.3 illustrates the patterns in potato exports by SA and the WC, along with the WC's share of exports within SA, utilizing quarterly data from 2014 to 2023. While SA's potato exports have seen a steady increase over the years, rising from R324 million in 2014Q4 to R434 million in 2023Q4, marking a growth rate of 34%, the WC's potato exports have declined by 46% during the same period, dropping from R126 million in 2014Q4 to R67 million in 2023Q4. Additionally, the WC's proportion of potato exports from SA has decreased from 39% in 2014Q4 to 16% in 2023Q4.

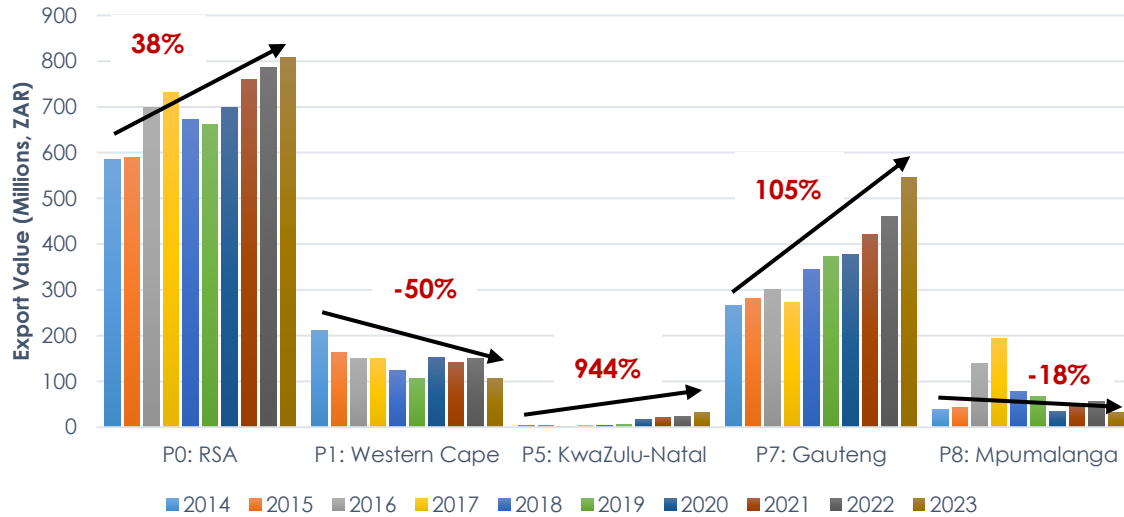


**Figure 4.3. World potato exports by SA and WC, and the share of WC exports in SA**

Source: Own compilation based on SARS; Quantec, 2024

Figure 4.4 illustrates the patterns in SA potato (HS 0701, including seed potatoes) exports by primary provinces from 2014 to 2023. Over this period, potato exports from Gauteng and KZN have demonstrated a consistent upward trajectory, increasing by 105% and 944%, respectively. Conversely, potato exports from the WC and Mpumalanga have experienced declines of 50% and 18%, respectively, during the same timeframe.<sup>8</sup>

<sup>8</sup> It is important to note that the designation of potato exports from Gauteng province does not necessarily indicate that the potatoes were grown there; rather, it signifies that the registered exporters are in Gauteng (DAFF, 2012).

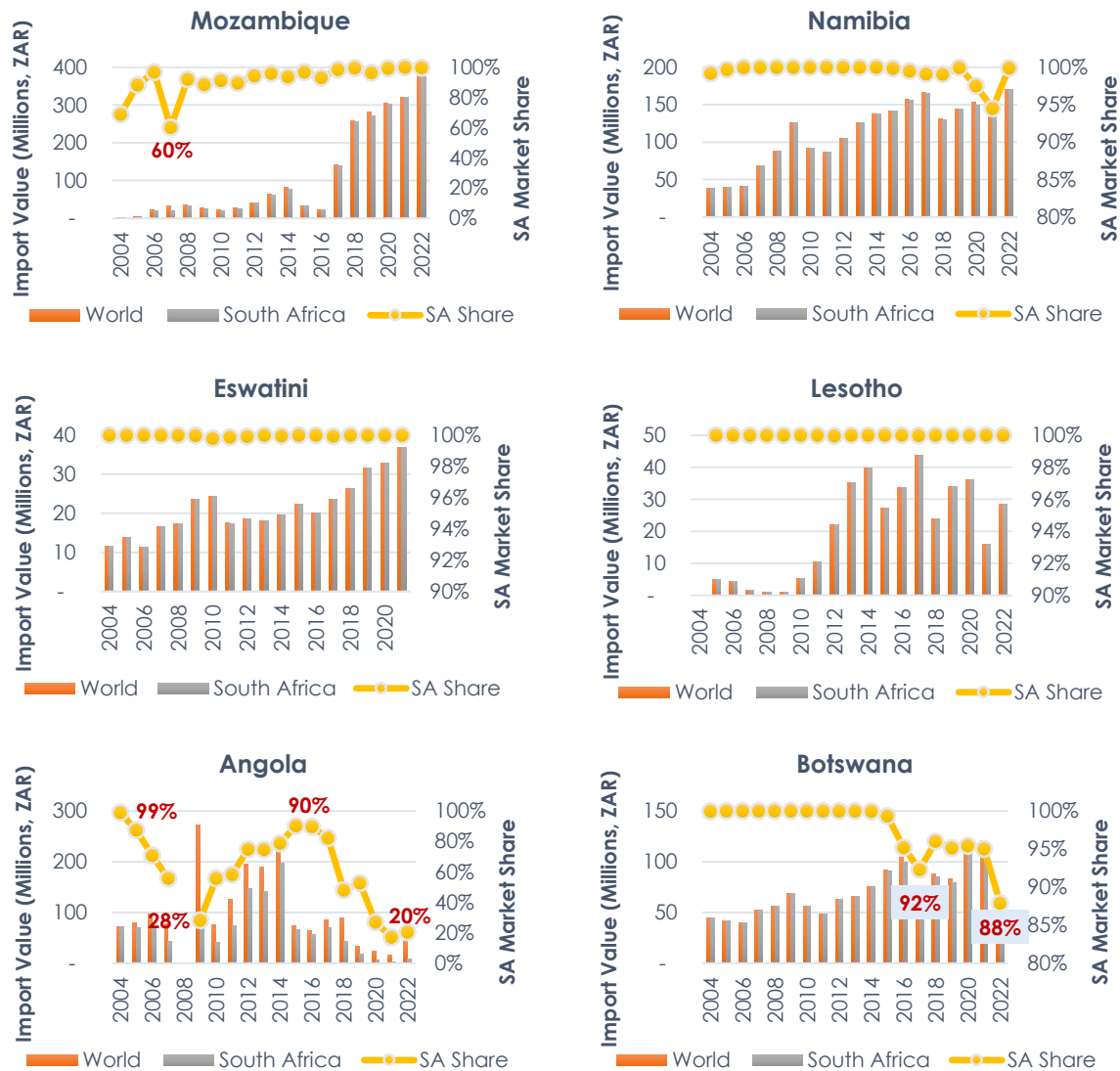


**Figure 4.4. SA potato exports by province**

Source: Own compilation based on SARS; Quantec, 2024

#### 4.2.2 Market Access: Potato Export Markets and Tariffs

Figure 4.5 depicts the potato imports in selected Southern African Development Community (SADC) countries and SA's market share in those nations. Over the past two decades, potato imports have witnessed significant growth in countries such as Mozambique, Namibia, Eswatini, and Lesotho, which primarily rely on SA as their source of potatoes. Conversely, potato imports have declined in countries like Angola and Botswana, reducing their dependence on SA and leading to competition from other countries such as Belgium, France, Germany, and the Netherlands, which benefit from preferential trading agreements (PTA) with SADC. According to DAFF (2012), the strength of the SA currency adversely affects potato exports to the SADC region. Additionally, the bulkiness of potatoes, their perishability, and the associated transport costs make potato exports prohibitively expensive. As highlighted by Zhang and Hu (2014), improving transportation links can facilitate market expansion, which is crucial for avoiding price collapse resulting from increasing local supply or market saturation. In SA, potato exports are transported via both land and sea, with sea freight primarily serving the Angolan market (NAMC, 2017). In the Middle East, the United Arab Emirates (UAE) remains a strategic market for SA.

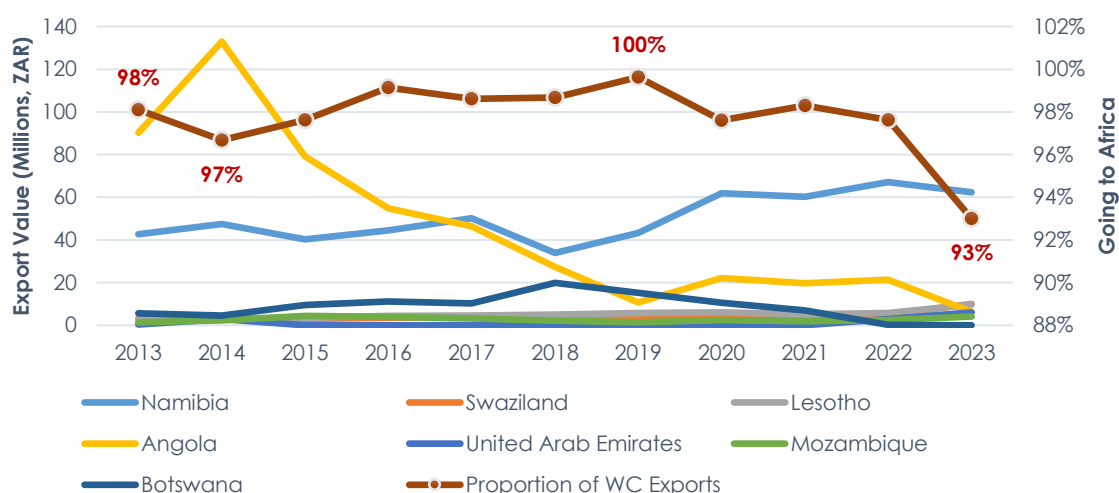


**Figure 4.5. Potato imports in selected SADC countries and SA market share**

Source: Own compilation based on ITC Trade Map, 2024

Figure 4.6 illustrates the trends in WC potato exports to major markets in Africa and the rest of the world from 2013 to 2023. Over the past decade, there have been significant shifts in the WC potato export markets. Angolan imports of WC potatoes have plummeted by 93%, decreasing from R90 million in 2013 to R6 million in 2023 due to import restrictive measures implemented by the Angolan government, which ceased allocating foreign exchange currency for vegetable imports (ABC, 2020). Additionally, Botswana ceased importing WC potatoes altogether in 2023, because of an import ban expected to expire in 2025 (News24, 2023). Conversely, Namibia has emerged as the primary importer of WC potatoes, comprising 58.3% of WC exports in 2023, followed by Swaziland at 9.3% and Lesotho at 9.1%. Although WC potato exports to Africa continue to dominate, there has been a slight decrease from 98% in 2013 to 93% in 2023. Meanwhile, WC potato exports to the UAE have surged significantly by 1,888%, rising from R303 thousand in 2013 to R6 million in 2023. Notably, WC potato exports have also

experienced substantial growth in Lesotho by 258%, Swaziland by 228%, and Mozambique by 184% during the same period.



**Figure 4.6. WC main potato export markets**

Source: Own compilation based on SARS; Quantec, 2024

Table 1 presents the tariffs imposed on SA potato imports for various selected countries. The Most Favoured Nation (MFN) tariffs from Angola have surged from 15% in 2010 (DAFF, 2012) to 50% between 2017 and 2018 (DAFF, 2019) to 39.98%, representing the highest rate that SA incurs with no preferential treatment. MFN tariffs have generally increased for most SADC countries since 2010, such as rising from 10% to 21.99% in Malawi and from 15% to 15.99% in Mozambique (which also holds the highest non-tariff measures in SADC), although they have decreased for Zimbabwe from 40% to 32.99%. However, SA benefits from preferential treatment in most of the selected countries, granting it a comparative advantage, particularly where MFN tariffs are high and not zero, as seen in Southern African Customs Union (SACU) countries, the UAE, and Mauritius.

**Table 1. Tariffs applied to SA potato imports**

Market	MFN Tariffs	Effectively Applied Tariffs	Year	# PTA	# NTM	Distance
Angola	39.98%	39.98%	2021			2539
Botswana	0%	0%	2024	1		522
Eswatini	0%	0%	2024	1		428
Germany	8.82%	0%	2023	1	23	9097
Lesotho	0%	0%	2024	1		369
Malawi	21.99%	0%	2022	1	1	1726
Mauritius	0%	0%	2024	1	20	3223
Mozambique	15.99%	0%	2023	1	14	879
Namibia	0%	0%	2024	1	5	1324
Saudi Arabia	5.53%	5.53%	2023		36	6118
United Arab Emirates	0%	0%	2023		36	6725
United Kingdom	7.39%	0%	2023	1		N/A
United States of America	0.71%	0%	2023	1	27	14275
Zambia	20.99%	0%	2023	1		1587
Zimbabwe	32.99%	0%	2015	1	2	1101

Data source: ITC Market Access Map, 2024

## 5. Transformation in the potato industry

According to Potatoes SA (2024a and 2024b), small-scale farmers encounter various challenges, including disease and pest infestations, receiving outdated and low-quality seed, and facing price volatility due to factors such as seasonality, weather conditions, and market demand, resulting in uncertainty and income instability for potato producers. Additionally, they experience pricing pressures from competition, potentially reducing profit margins for transformation producers, as well as limited access to higher-value markets due to a lack of market information and challenges with transportation and packaging requirements, such as inadequate access to proper storage facilities or transportation infrastructure. Moreover, they face protectionism by importing countries and policy and institutional factors, alongside a lack of support for potato producer groups and associations.

Black producers in the industry have benefited from the Potatoes SA Enterprise Development Programme (EDP). While the land utilized or hectares planted has increased from 40 ha in 2011 to about 220 ha in 2023, the number of black producers has remained stable around 20-30 individuals over the past decade due to a lack of funding to the program from statutory levy (Potatoes SA, 2024c). Additionally, over 400 ha of potatoes are planted by black and commercial producers funded by the Department of Agriculture Land Reform and Rural Development (DALRRD). However, black producers only contribute about 10% of agricultural outputs (Potatoes SA, 2024c). Addressing the barriers of access to funding and resources, could unlock the potential for greater participation and contribution from black producers, leading to more inclusive growth in the potato industry.

In 2023, the EDP producers utilized various markets, including unwashed export markets (20-49%), fresh produce markets (8-20%), unwashed informal markets (6-15%), and agro-processing markets (6-16%) (Potatoes SA, 2024b). Furthermore, in 2021, informal traders accounted for 66% of all national market sales (Potatoes SA, 2021). Policies and initiatives aimed at formalizing and supporting these informal markets could help improve market access and income for producers while also ensuring food security and affordability for consumers.

## 6. Conclusion and Recommendations

South Africa maintains its position as the most productive nation in terms of yield (tons/ha) in Africa and stands as a contender against many EU countries. With the increasing global population and the rising popularity of potatoes in developing nations, SA possesses significant potential to expand its production scale, particularly considering the reliance of many SADC countries on SA imports. Potatoes are integral to the UN Sustainable Development Goals, addressing poverty and hunger, particularly in Africa, due to their nutritional value. Recognized as a strategic value chain in Africa, the potato industry presents considerable expansion opportunities, with SA identified by the ITC as having substantial potential for growth. Therefore, it is imperative for South Africa to assume a strategic role within SADC, especially in shaping regional industrial policies and leveraging opportunities presented by the African Continental Free Trade Area (AfCFTA), which could potentially rejuvenate markets like Angola and Botswana by reducing tariffs or removing bans on potatoes. Given the paramount importance of food security and infrastructure development in developing nations, SA's involvement in international dialogues, championed by organizations like the African Union, can facilitate access to new markets that stand to benefit from SA potatoes.

This report offers valuable insights into the status of the potato industry, serving as a foundation for discussions among farmers and key stakeholders. Collaborative efforts and partnerships spanning countries and institutions are essential for stabilizing potato prices, given their susceptibility to volatility caused by various factors such as fluctuating economic conditions, environmental pressures, heightened competition, absence of trade agreements, high tariffs, regulatory constraints, and shifts in global supply and demand dynamics (Pieterse, 2024). Failing to address these challenges could exacerbate issues related to inclusivity and transformation within the country. The push for regional integration across the continent underscores the importance of developing the agricultural sector through the establishment of regional value chains and trade networks (Sharma and Atieno, 2022). In this context, the SA potato sector stands poised to make a significant contribution, particularly within the SADC region.

Zhang and Hu (2014) observed that industrial policies impacting the potato cluster were enacted on a regional scale, encompassing activities like land levelling, development of improved varieties, establishment of a potato trade association, advocacy for increased freight car quotas, and attraction of processing firms. They contended that regional-level industrial policymaking significantly contributes to economic advancement. Markets with high value often demand substantial investment and expertise, resources typically lacking among low-income households. Tobin *et al.* (2016) advocate for investment in smallholder farmers through



equitable access to inputs, collaborative efforts among multiple stakeholders, and extension services, aiming to ensure that value chains genuinely benefit impoverished individuals.

In the Western Cape, particularly in the Garden Route district with the highest yield, there exists potential for expansion, yet overall production levels remain relatively modest. Although the quantity of potatoes sold in fresh produce markets was lower compared to previous years, prices were notably higher, indicating the influence of supply and demand dynamics on pricing. To support production expansion, enhancing market access in the WC, particularly in nearby markets where SA enjoys preferential treatment, is crucial. The WC has experienced a notable decline in its share of the Angola and Botswana markets, and revitalizing these markets could bolster the province's export share, which has seen a decrease over time. Specifically, a preferential trade agreement between SA and Angola to reduce tariffs on South African potatoes could be advantageous for the WC. However, conducting a detailed market research is essential to understand the primary factors behind the decline in market share or any trade barriers in these countries.

In summary, there is a need to explore and develop new markets, both domestically and internationally, to reduce dependency on traditional export destinations and mitigate market and price volatility. To advocate for policies that promote sustainable agriculture, facilitate trade, and reduce regulatory barriers, thereby creating an enabling environment for growth and investment in the potato sector. To provide targeted support and capacity-building initiatives for smallholder farmers, including access to finance, technical assistance, and market linkages, to ensure inclusivity and equitable participation in the value chain.

## 7. Appendices: Rankings

No Change

Decline

Increased

**Table 2. Global ranking based on area harvested (ha)**

Rank	Area (ha)	2000	Rank	Area (ha)	2022
1	China, mainland	4723170	1	China, mainland	5723449
2	Russian Federation	2814266	2	India	2226000
3	Ukraine	1631000	3	Ukraine	1204300
4	India	1340900	4	Russian Federation	1086482
5	Poland	1250623	5	Bangladesh	464011
6	Belarus	661000	6	United States of America	362440
7	United States of America	545320	7	Peru	341468
8	Canada	393500	8	Nigeria	322523
9	Germany	304380	9	Pakistan	314125
10	Peru	284671	10	Germany	266400
49	South Africa	53612	39	South Africa	66898

Data source: FOASTAT, 2024

**Table 3. Regional ranking based on area harvested (ha)**

Rank	Area (ha)	2000	Rank	Area (ha)	2022
1	Nigeria	212 000	1	Nigeria	322 523
2	Malawi	177 834	2	Egypt	213 272
3	Rwanda	108 983	3	Kenya	209 770
4	Kenya	108 516	4	Algeria	130 396
5	Tanzania	76 219	5	Tanzania	120 184
6	Egypt	75 018	6	Rwanda	119 744
7	Algeria	72 690	7	Malawi	78 884
8	Uganda	68 000	8	Ethiopia	74 727
9	Morocco	60 510	9	Angola	68 040
10	South Africa	53 612	10	South Africa	66 898

Data source: FOASTAT, 2024

**Table 4. Global ranking based on production (Tons)**

Rank	Production (t)	2000	Rank	Production (t)	2022
1	China, mainland	66 275 000	1	China, mainland	95 570 055
2	Russian Federation	29 464 801	2	India	56 176 000
3	India	25 000 100	3	Ukraine	20 899 210
4	Poland	24 232 376	4	Russian Federation	18 887 679
5	United States of America	23 293 964	5	United States of America	17 791 840
6	Ukraine	19 838 100	6	Germany	10 683 400
7	Germany	13 192 951	7	Bangladesh	10 144 835
8	Belarus	8 717 800	8	France	8 067 380
9	Netherlands	8 227 000	9	Pakistan	7 936 884
10	United Kingdom	6 636 000	10	Netherlands	6 915 900
29	South Africa	1 697 015	26	South Africa	2 528 946

Data source: FOASTAT, 2024

**Table 5. Regional ranking based on production (Tons)**

Rank	Production (t)	2000	Rank	Production (t)	2022
1	Malawi	2 037 283	1	Egypt	6 155 467
2	Egypt	1 769 910	2	Algeria	4 299 817
3	<b>South Africa</b>	<b>1 697 015</b>	3	<b>South Africa</b>	<b>2 528 946</b>
4	Algeria	1 207 690	4	Morocco	1 768 362
5	Morocco	1 090 350	5	Kenya	1 754 000
6	Rwanda	957 202	6	Malawi	1 465 202
7	Kenya	670 303	7	Ethiopia	1 294 304
8	Tanzania	600 712	8	Nigeria	1 216 409
9	Nigeria	599 000	9	Tanzania	1 013 154
10	Uganda	478 000	10	Rwanda	908 007

Data source: FOASTAT, 2024

**Table 6. Global ranking based on yield (Tons/ha)**

Rank	Yield (T/ha)	2000	Rank	Yield (T/ha)	2022
1	Netherlands	45,65	1	New Zealand	50,86
2	Belgium	44,41	2	United States of America	49,09
3	Germany	43,34	3	Denmark	44,22
4	United States of America	42,72	4	Kuwait	44,13
5	Denmark	42,49	5	Ireland	43,34
6	Switzerland	42,44	6	Netherlands	42,61
7	New Zealand	42,32	7	Australia	42,04
8	United Kingdom	39,98	8	Canada	41,92
9	France	39,60	9	Germany	40,10
13	<b>South Africa</b>	<b>31,65</b>	14	<b>South Africa</b>	<b>37,80</b>

Data source: FOASTAT, 2024

**Table 7. Regional ranking based on yield (Tons/ha)**

Rank	Yield (T/ha)	2000	Rank	Yield (T/ha)	2022
1	<b>South Africa</b>	<b>31,65</b>	1	<b>South Africa</b>	<b>37,80</b>
2	Réunion	25,31	2	Niger	34,17
3	Egypt	23,59	3	Algeria	32,98
4	Mauritius	22,26	4	Morocco	32,82
5	Libya	20,00	5	Egypt	28,86
6	Mali	18,64	6	Mali	24,90
7	Morocco	18,02	7	Senegal	23,97
8	Sudan (former)	16,74	8	Cabo Verde	23,85
9	Algeria	16,61	9	Mauritius	23,49
10	Lesotho	16,42	10	Libya	20,00

Data source: FOASTAT, 2024

**Table 8. Global ranking based on production value (1000 USD)**

Rank	Gross Production Value (1000 US\$)	2000	Rank	Gross Production Value (1000 US\$)	2022
1	China, mainland	6 964 936	1	China, mainland	37 166 049
2	Russian Federation	3 886 154	2	Iran	6 139 157
3	United States of America	2 608 924	3	Russian Federation	5 201 735
4	India	2 347 500	4	United States of America	5 059 928
5	Japan	2 191 675	5	Peru	2 149 256
6	Ukraine	1 885 280	6	Japan	2 140 031
7	Poland	1 293 553	7	Egypt	2 138 783
8	Türkiye	1 022 817	8	Canada	1 738 890
9	United Kingdom	863 513	9	Türkiye	1 498 395
24	<b>South Africa</b>	<b>294 663</b>	23	<b>South Africa</b>	<b>599 927</b>

Data source: FOASTAT, 2024

**Table 9. Regional ranking based on production value (1000 USD)**

Rank	Gross Production Value (1000 US\$)	2000	Rank	Gross Production Value (1000 US\$)	2022
1	Egypt	319 624	1	Egypt	2 138 783
2	<b>South Africa</b>	<b>294 663</b>	2	Rwanda	664 754
3	Kenya	216 827	3	<b>South Africa</b>	<b>599 927</b>
4	Morocco	205 231	4	Guinea	592 919
5	Rwanda	90 882	5	Morocco	421 351
6	Tunisia	50 142	6	Mali	263 099
7	Ethiopia	35 608	7	Niger	228 964
8	Mozambique	31 517	8	Tunisia	92 280
9	Madagascar	29 699	9	Lesotho	59 899
10	Eritrea	17 552	10	Zambia	41 408

Data source: FOASTAT, 2024

**Table 10. Global ranking based on export value (1000 USD)**

Rank	Export Value (1000 USD)	2000	Rank	Export Value (1000 USD)	2022
1	Netherlands	251 990	1	Netherlands	989 400
2	France	183 975	2	France	840 593
3	Germany	110 514	3	Germany	464 324
4	Canada	95 221	4	Canada	427 470
5	United States of America	93 385	5	Egypt	316 001
6	Belgium	77 200	6	United States of America	303 411
7	Italy	70 810	7	China, mainland	248 754
8	United Kingdom	57 357	8	Belgium	214 692
9	Spain	56 234	9	Pakistan	213 765
30	<b>South Africa</b>	<b>4 421</b>	16	<b>South Africa</b>	<b>48 105</b>

Data source: FOASTAT, 2024

**Table 11. Regional ranking based on export value (1000 USD)**

Rank	Export Value (1000 USD)	2000	Rank	Export Value (1000 USD)	2022
1	Egypt	27 390	1	Egypt	316 001
2	Morocco	17 369	2	<b>South Africa</b>	<b>48 105</b>
3	<b>South Africa</b>	<b>4 421</b>	3	Ethiopia	17 630
4	United Republic of Tanzania	969	4	Morocco	13 524
5	Ethiopia	770	5	Kenya	3 975
6	Libya	250	6	Uganda	1 085
7	Namibia	117	7	Algeria	586
8	Gambia	98	8	Equatorial Guinea	545
9	Zimbabwe	92	9	Nigeria	261
10	Côte d'Ivoire	36	10	Côte d'Ivoire	260

Data source: FOASTAT, 2024

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