agriculture
& rural development
Department:
agriculture
& rural development
PROVINCE OF KWAZULU-NATAL

KZN Department of Agriculture & Rural Development
Private Bag X9059, Pietermaritzburg, 3200

Enquiries: Ms. LC Sibisi
Agricultural Economics, Marketing and Value Adding
Tel: 033 343 8035 or 033 343 8201
Email: Londiwe.Sibisi@kzndard.gov.za
Website: www.kzndard.gov.za

Fresh Produce Market Analysis Report for Quarter 1 (Jan-Mar 2017)

CONTENTS PAGE

1. INTRODUCTION

The main purpose of this publication is to present a quarterly analysis of KwaZulu-Natal (KZN) Fresh Produce Markets volumes, prices and trends at the Pietermaritzburg and Durban Fresh Produce Markets (FPM). The bulletin will cover trend analysis relating to prices (R/ ton) and volumes (tons) of the selected vegetables sold at the two markets, considered to be of importance due to the area under production within KZN and/or marketed volumes. The interval covered in the current issue quarter 1 of 2016 (January-March 2016) which will be compared with Quarter 1 of 2017 (January- March 2017).

This document focuses only on the following commodities: potatoes, sweet potatoes, carrots, cabbage, lettuce, pumpkins, gem squashes, butternut squashes, tomatoes, peppers and English cucumber however the combination of selected vegetables might change over time due to relevance.

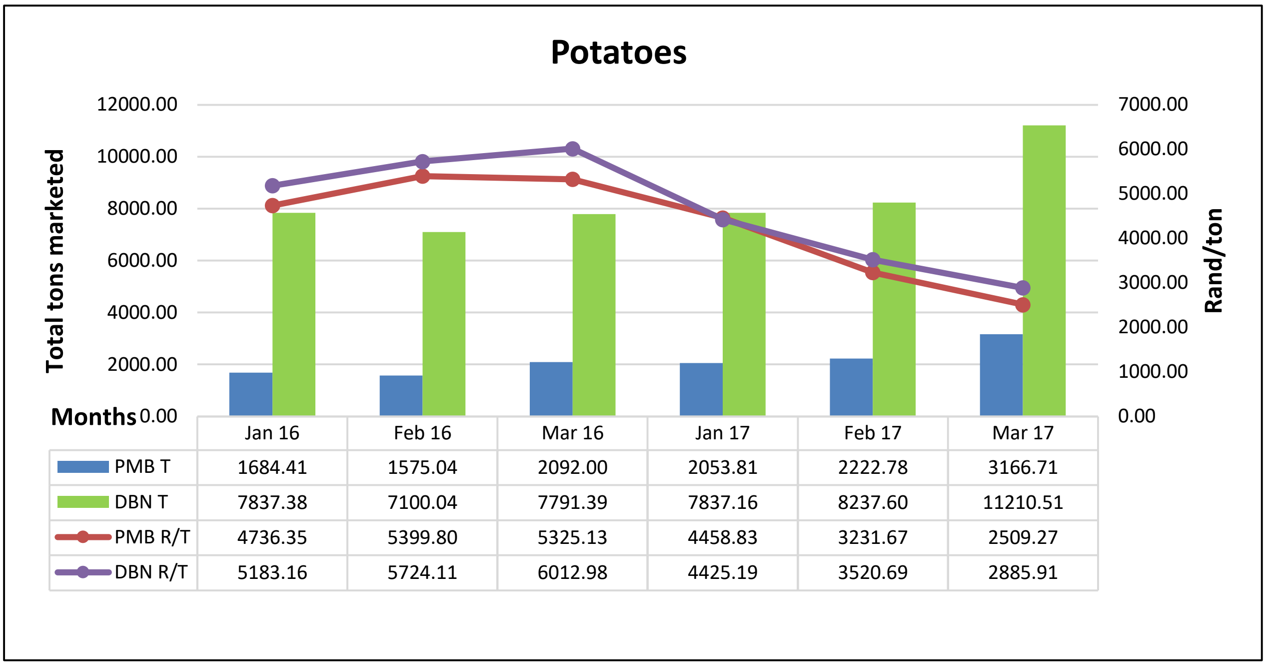
2. SUMMARY

Average quarter one for 2017 volumes have generally increased from averages of 2016 quarter 1 for the both markets but these increases were more pronounced in the Pietermaritzburg Fresh Produce Market. The leading crops in volumes increased were sweet potatoes, cabbages, peppers and pumpkins, while decreases in volumes were observed in sweet potatoes and potatoes in Durban and gem squashes and lettuce in the PMB market.

Prices have generally declined for both markets, consistent with the increase in volumes. Major price declines were observed for onions in both markets as well as peppers, butternut squashes, and cabbage for PMB and spinach and pumpkins for Durban FPM.

A detailed analysis and discussion is presented herein for the various fresh produce in both Pietermaritzburg and Durban Fresh Produce Markets, comparing Jan-Mar 2016 to Jan-Mar 2017.

2.1. POTATOES



	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	1684.41	1575.04	2092.00	2053.81	2222.78	3166.71
DBN T	7837.38	7100.04	7791.39	7837.16	8237.60	11210.51
PMB R/T	4736.35	5399.80	5325.13	4458.83	3231.67	2509.27
DBN R/T	5183.16	5724.11	6012.98	4425.19	3520.69	2885.91

Figure 1: Trends for potatoes in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- The supply of potatoes was highest in March 2017 at 3, 166.71 tons, which was 51% higher than the volume supplied in the same month of 2016. A similar upward trend was observed for the average quarter supply which rose by 39% from 1,783.82t in 2016 to 2, 481.10t in 2017.07.05

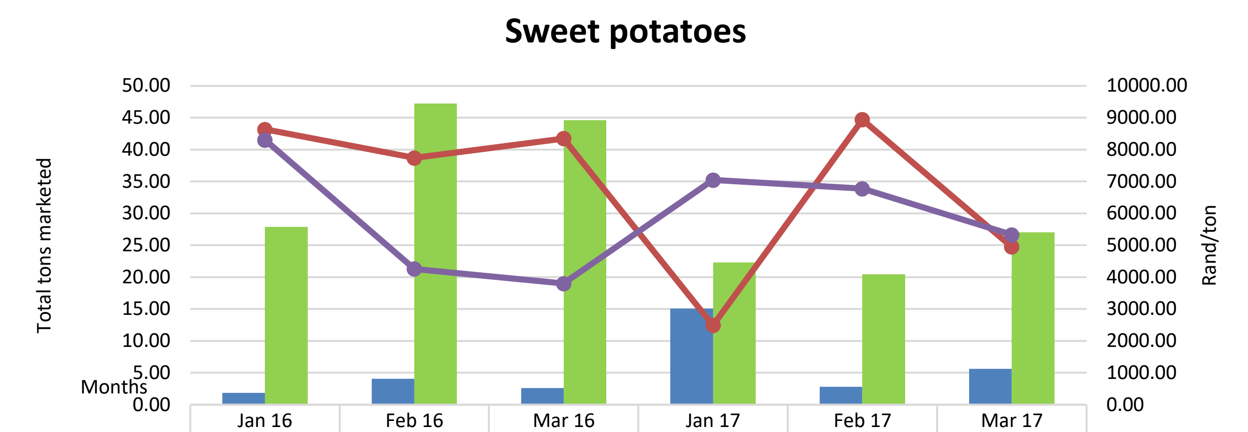
- The price of potatoes was highest in January 2017 valued at R4, 458.83/t, which was 6% lower than the value of potatoes in the same month of 2016 which was recorded at R4, 736.35/t. On average, the potato price dropped by 34% from R5, 153.76/t in the 1st quarter of 2016 to R3, 399.92/t in the same time of 2017.

Durban

- Supply of potatoes was highest in March 2017 at 11, 210 tons, which was 44% higher than the volume supplied in the same month of 2016. Average quarter supply was also higher by 20% in 2017 at 9, 098.09t compared to 7, 576t for 2016.

- The price of potatoes was highest in January 2017 worth the value of R4, 425.19/t which was 15% lower compared to the value of potatoes in the same month of 2016. The average price of potatoes in the 1st quarter of 2017 also showed a decline of 36% from R5, 640.08/t in 2016 t R3, 610.60/t in 2017 quarter 1.

2.2. SWEET POTATOES



	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	1.84	4.04	2.59	15.05	2.79	5.59
DBN T	27.90	47.22	44.61	22.31	20.42	27.00
PMB R/T	8632.15	7737.51	8347.49	2488.04	8940.02	4951.46
DBN R/T	8299.40	4257.61	3797.88	7044.12	6773.56	5328.51

Figure 2: Trends for sweet potatoes in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- The supply of sweet potatoes was highest in January 2017 at 15.05t, which was significantly higher the 1.84t recorded in January of 2016. The average supply of sweet potatoes in the 1st quarter of 2017 was 7.81t which was also over 2.5 times higher than the 1st quarter of 2016 average which was at 2.82t.

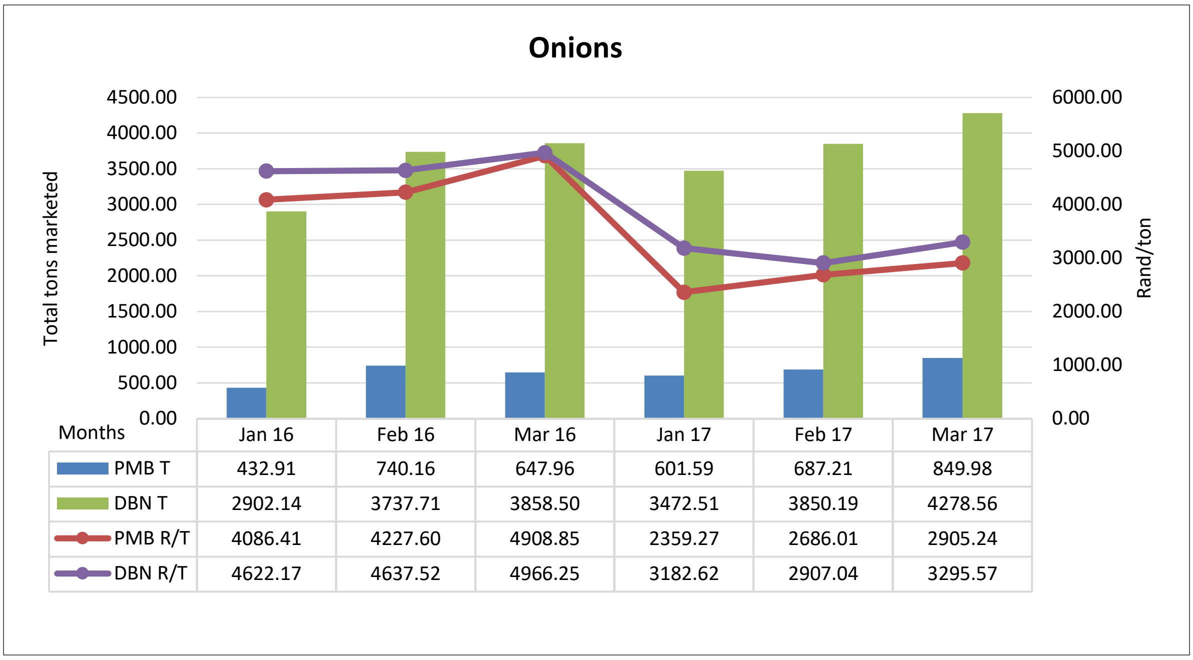
- Sweet Potato prices were highest in February 2017 at R8, 940.02/t, which was 16% higher compared to the value of sweet potatoes in the same month of 2016, however the average price of sweet potatoes in the 1st quarter of 2017 at R5, 459.66/t which was 34% lower compared to the quarter average of 2016 at R8, 238.67t .

Durban

- Volumes of sweet potatoes markets in the Durban FPM were highest in March 2017 at 27.00t, which was 39% lower than the volume supplied in the same month of 2016. While the average supply of sweet potatoes in the 1st quarter of 2017 was 23.24t showed an average decline of 42% compared to the 1st quarter of 2016 at 39.91t.

- The price of sweet potatoes was highest in January 2017 valued at R7, 044.12/t, which was 15% lower than the value of sweet potatoes in the same month of 2016, however the average price was 18% higher for the 1st quarter of 2017 at R6, 382/t compared to R5, 428/t for 2016.

2.3. ONIONS



Months	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	432.91	740.16	647.96	601.59	687.21	849.98
DBN T	2902.14	3737.71	3858.50	3472.51	3850.19	4278.56
PMB R/T	4086.41	4227.60	4908.85	2359.27	2686.01	2905.24
DBN R/T	4622.17	4637.52	4966.25	3182.62	2907.04	3295.57

Figure 3: Trends for Onions in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- The supply of onions was highest in March 2017 at 849.98t, which was 31% more than the volume supplied in the same month of 2016. The average supply onions in the 1st quarter of 2017 was 713t, indicating a 17% increase in average volumes from the 2016 average of 607t.

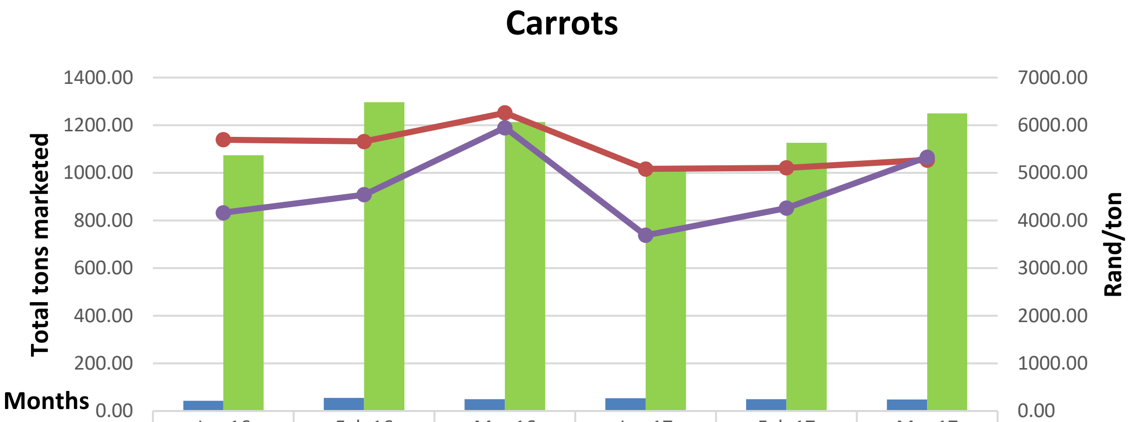
- Onion price was highest in March 2017 at R2, 905.24/t, which was 41% lower than the price at the same time in 2016. Average quarter price showed a 40% decline from R4, 407.33/t in 2016 to R2, 650/t in 2017.07.06

Durban

- The supply of onions was highest in March 2017 at 4, 278.56t, which was 11% higher than the volume supplied in the same month of 2016, while the average supply of onions in the 1st quarter of 2017 was 3,867.33t which was an increase of about 11% from the 2016 average of 3, 499.66t.

- Onion prices were highest in March 2017 at the price of R3, 295.57/t, which was 34% lower compared to the value of onions in the same month of 2016, the average quarter price also decreased by 34% from R4, 742/t in 2016 to R3, 128.66/t in 2017.

2.4. CARROTS



	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	43.64	56.27	50.41	54.37	50.77	49.32
DBN T	1073.91	1296.99	1214.07	1030.66	1126.78	1249.86
PMB R/T	5697.19	5663.28	6262.57	5085.77	5109.03	5271.37
DBN R/T	4165.26	4543.12	5948.95	3692.60	4262.71	5333.34

Figure 4: Trends for carrots in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- Volumes of carrots in this market were highest in January 2017 at 54.37 tons which was 25% higher than the volume supplied in the same month of 2016. On average , supply increased by 28% in the first quarter of 2017 form an average of 40.11t in 2016 to 51.49t in 2017.07.06

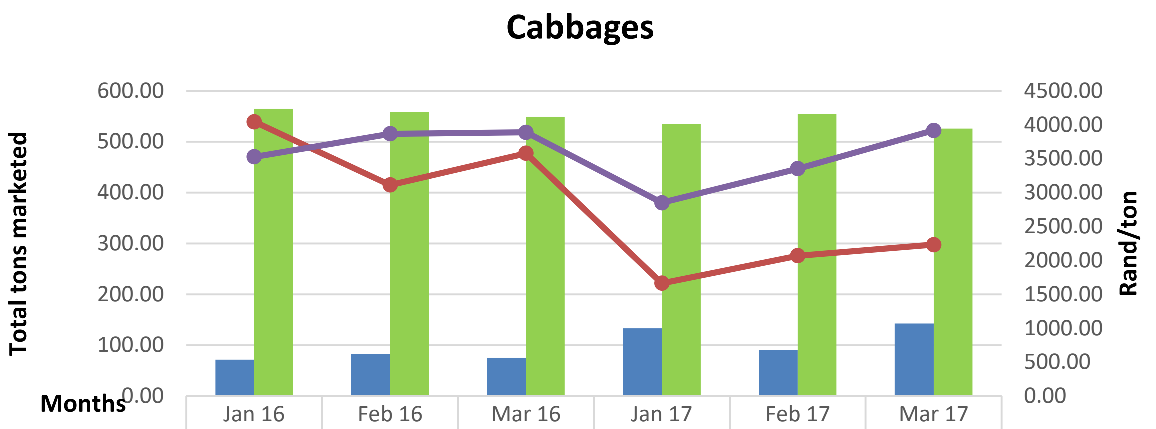
- Prices were the highest in March 2017 at R5, 271.37/t representing a 19% decrease compared to R6, 262.57/t during the same month in 2016. Average quarter prices also declined by 12% from R5, 868.33/t in 2016 to R5, 155.33/t in 2017.

Durban

- In this FPM the highest volumes of carrots were marketed in March 2017 at 1, 249.86 tons which was a 3% increase from 2016 volumes for the same month. Average volumes supplied to tis market carrots declined by 5% from 1, 195t in 2016 to 1, 136t in 2017.

- Prices were the highest in March 2017 at R5, 333.34/t representing a 10% decrease compared to R5, 948.95/t during the same month in 2016. The average carrot price for the 1st quarter in 2016 was R4, 886/t and R4, 430/t in 2017 which was a 9% decrease from 2016 prices.

2.5. CABBAGE



	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	71.55	82.53	75.03	133.31	90.21	142.74
DBN T	564.57	558.58	549.18	534.60	554.82	525.83
PMB R/T	4042.56	3111.02	3576.89	1661.62	2067.64	2230.08
DBN R/T	3526.37	3864.95	3887.64	2849.39	3351.11	3915.57

Figure 5: Trends for cabbage in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- The volume of cabbages marketed in quarter one was the highest in March 2017 at 142.74 tons which represented a 91% increase compared to the volume marketed in the same month in the previous year. On average, in this quarter quantities of cabbage received in this market increased by 59%.

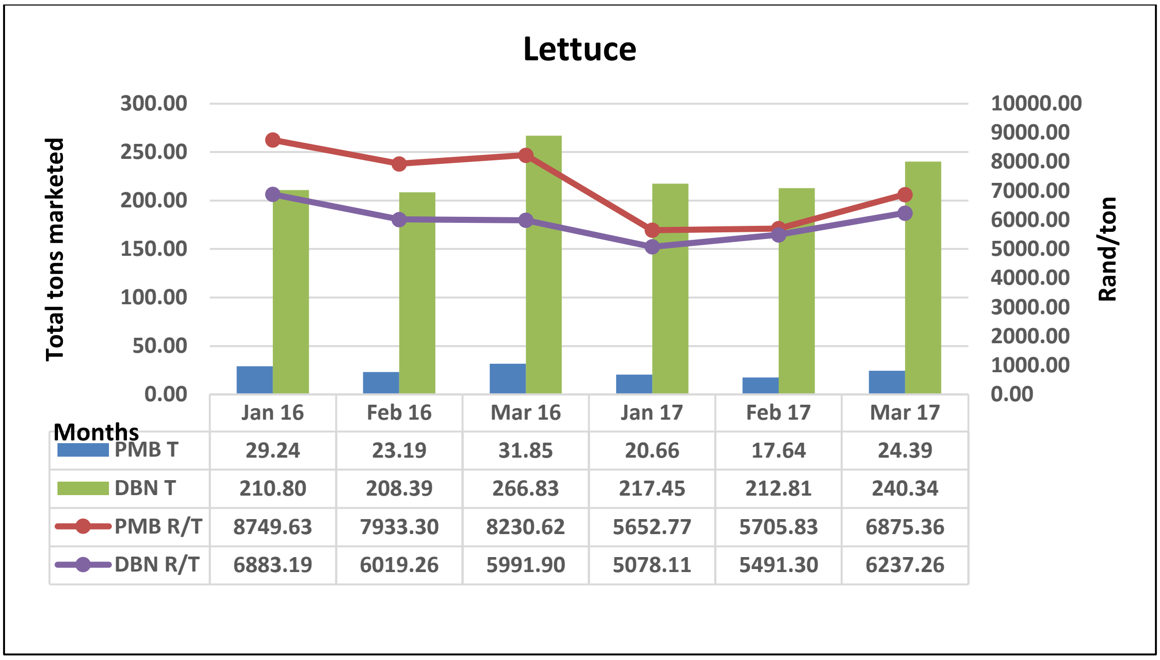
- Prices were the highest in March 2017 at R2, 230.08/t representing a 38% decrease compared to R3, 576.89/t during the same month in 2016. Average prices also showed a decline of 44% from R3, 577/t in 2016 to R1, 987/t in 2017.

Durban

- Cabbages marketed in this market were highest in volume in February 2017 at 554.82 tons which was just slightly below the supply of observed in the same month of 2016. Average quarter volumes also declined by 3% from 558t in 2016 to 539t in 2017.

- Prices were the highest in March 2017 at R3, 915.57/t representing a less than 1% increase from the price recorded at the same month in 2016. Average prices for cabbage in the first quarter of 2017 showed a slight decline of 10% from R3, 760/t in 2016 to R3, 372/t in 2017.

2.6. LETTUCE



Months	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	29.24	23.19	31.85	20.66	17.64	24.39
DBN T	210.80	208.39	266.83	217.45	212.81	240.34
PMB R/T	8749.63	7933.30	8230.62	5652.77	5705.83	6875.36
DBN R/T	6883.19	6019.26	5991.90	5078.11	5491.30	6237.26

Figure 6: Trends for lettuce in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- The supply of lettuce was highest in March 2017 at 24.39t, which was 23% lower than the volume supplied in the same month of 2016. Consistently average supply was also lower by 25% from 28t in 2016 to 21t in 2017.

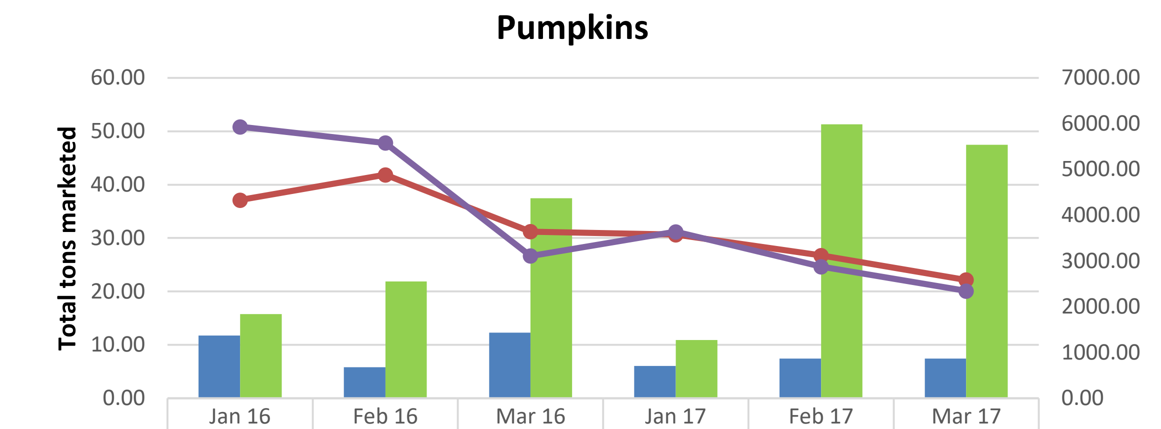
- The price of lettuce was the highest in March 2017 worth the value of R6, 875.36/t, which was 16% lower compared to the value of lettuce in the same month of 2016. A 27% decline was also observed in average prices for the periods in comparison from R8, 305/t in 2016 to R6, 078/t in 2017.

Durban

- Volumes of lettuce market in this markets were highest in March 2017 at 240.34t, this was 10% lower than the volume supplied in the same month of 2016. Average volumes comparing the two quarters showed a slight decline of 2% from 229t in 2016 to 223t in 2017.

- Lettuce prices were the highest in March 2017 worth R6, 237.26/t, which was 8% higher compared to the value of lettuce in the same month of 2016. However , on average prices dropped by 11% from R6, 298/t in 2016 to R5, 602/t in 2017.07.06

2.7. PUMPKINS



	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	11.76	5.82	12.29	6.04	7.46	7.44
DBN T	15.78	21.90	37.47	10.89	51.33	47.49
PMB R/T	4331.63	4883.16	3642.50	3575.38	3119.77	2584.11
DBN R/T	5930.93	5576.94	3109.95	3638.20	2874.08	2345.34

Figure 7: Trends for pumpkins in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- Pumpkins sold through this market were highest in supply during the month of February 2017 at 7.46t, this was 28% higher than the supply in this market at the same time in 2016.Average supply also showed a decline of 30% from 10t in 2016 to 7t in 2017.

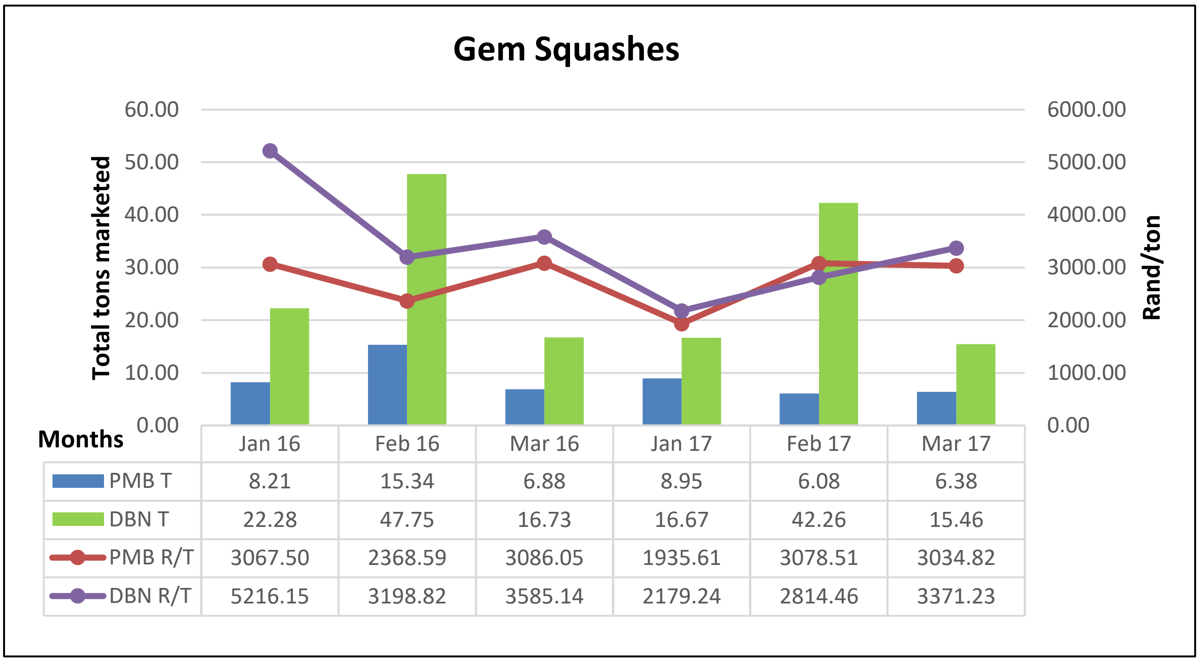
- The price of pumpkins was highest in January 2017 at R3, 575.38/t, which was 17% lower compared to the value of pumpkins in the same month of 2016. The average price of pumpkins decreased by 28% from R4, 286/t in 2016 to R3, 093/t in 2017.

Durban

- The supply of pumpkin was highest in February 2017 at 51.33t, which was about more than double the volumes of the same time in 2016. The average supply of pumpkins in the 1st quarter of 2017 increased by 47% from 25t in 2016 to 37t in 2017.

- Pumpkin prices were the highest in January 2017 at R3, 638.20/t, which was 39% lower compared to the value of pumpkins in the same month of 2016. Average quarter prices also declined by 29% from R4, 873/t in 2016 to R2, 953/t in 207.

2.8. GEM SQUASHES



Months	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	8.21	15.34	6.88	8.95	6.08	6.38
DBN T	22.28	47.75	16.73	16.67	42.26	15.46
PMB R/T	3067.50	2368.59	3086.05	1935.61	3078.51	3034.82
DBN R/T	5216.15	3198.82	3585.14	2179.24	2814.46	3371.23

Figure 8: Trends for gem squashes in PMB and DBN FPM (2016 and 2017 Q1)

Pietermaritzburg

- Supply of gem squashes was highest in January 2017 at 8.95t, which was 9% higher than the volume supplied in the same month of 2016. The average supply of gem squashes in the 1st quarter of 2017 was 6.95t and 10t for the 1st quarter of 2016, this is an increase of 30% on average volumes for gem squashes over this time of the year.

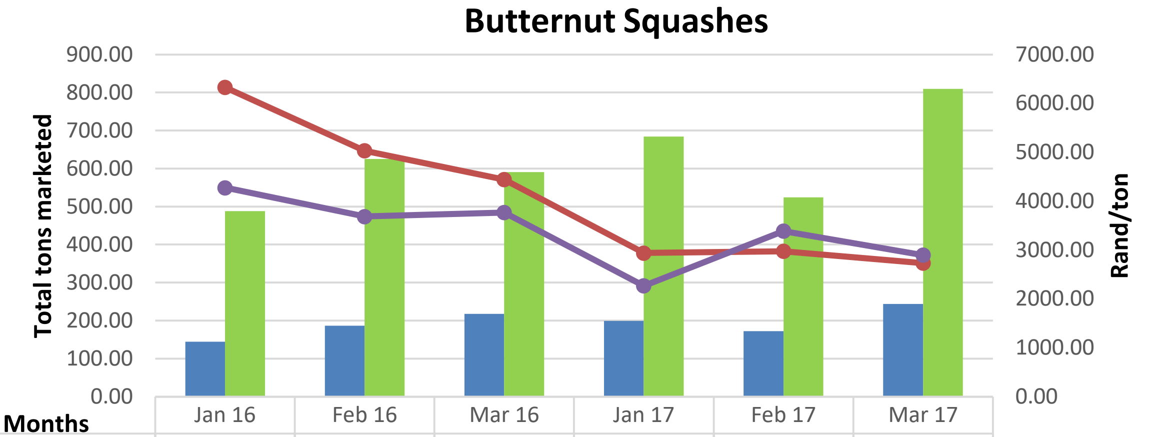
- The price of germ squashes was highest in February 2017 worth the value of R3, 078.51/t, which was 30% higher compared to the value of germ squashes in the same month of 2016. The average price of germ squashes supplied in the 1st quarter of 2017 showed a slight increase of 6% from that of 2016 which was R2, 841/t.

Durban

- In this market, gem squash supply was highest in February 2017at 42.26t which was 11 lower than the volumes of the same month of 2016. The average supply of germ squashes in the 1st quarter of 2017 also indicated a declines of 14% from 29t in 2016 to 25t in 2017.

- The price of germ squashes was highest in March 2017 worth R3, 371.23/t, which was 6% lower compared to the value of germ squashes in the same month of 2016. On average from the 1st quarter of 2017, prices decreased by 30% from R4, 000/t in 2016 to R 2, 788.0/t in 2017.

2.9. BUTTERNUT SQUASHES



Months	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	144.73	186.65	217.92	199.57	171.90	243.84
DBN T	488.09	625.40	590.55	684.26	524.01	809.76
PMB R/T	6328.74	5033.03	4441.18	2938.58	2975.79	2731.50
DBN R/T	4275.04	3686.89	3768.99	2266.71	3386.22	2898.06

Figure 9: Trends for butternut squashes in DBN and PMB FPM (2016 and 2017 Q1)

Pietermaritzburg

- The supply of butternut squashes was highest in March 2017 at 243.84t, which was 12% higher than the volume supplied in the same month of 2016. The average supply of butternut squashes in the 1st quarter of 2017 also increased by 12% from 183t in 2016 to 205t in 2016.

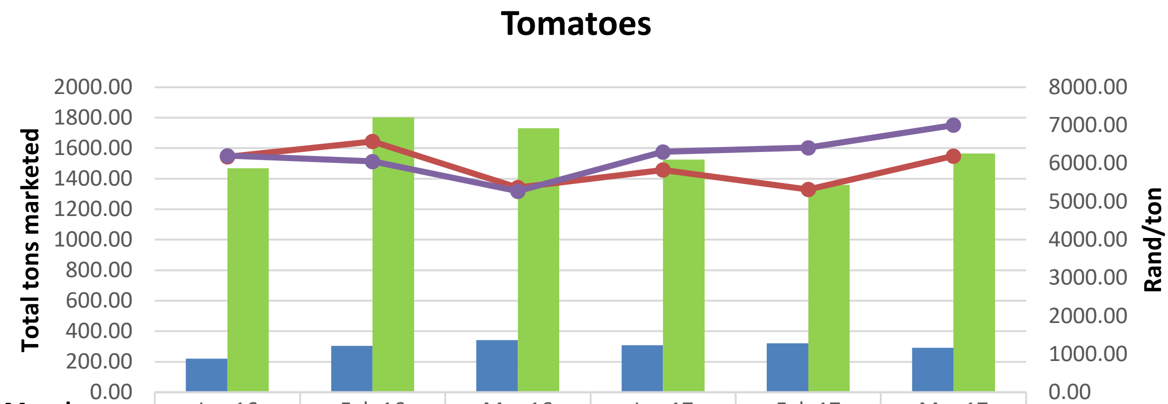
- The price of butternut squashes was highest in February 2017 at R2, 975.79/t which was 41% lower compared to the value of butternut squashes in the same month of 2016. The average price of butternut squashes supplied in the 1st quarter of 2017 was R2, 850/t which was 46% lower compared to the 1st quarter of 2016 at R 5, 268/t.

Durban

- Butter squashes volumes was highest in March 2017 at 809.76t, which was 37% higher than the volume supplied in the same month of 2016. The average supply of butternut squashes in the 1st quarter of 2017 (672t) was 18% higher compared to the 1st quarter of 2016 (568t).

- The price of butternut squashes was highest in February 2017 worth the value of R3, 386.22/t, which was 8% lower compared to the value of butternut squashes in the same month of 2016, consistently the average price for the first quarter was also lower than 2016 average by 27%.

2.10. TOMATOES



Months	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	220.16	303.86	341.33	307.65	320.54	292.44
DBN T	1468.38	1801.22	1730.86	1526.01	1360.21	1565.61
PMB R/T	6175.46	6574.72	5368.13	5830.78	5319.16	6193.80
DBN R/T	6201.87	6052.61	5271.75	6304.19	6411.01	7005.57

Figure 10: Trends for tomatoes in DBN and PMB FPM (2016 and 2017 Q1)

Pietermaritzburg

- Supply of tomatoes was highest in February 2017 at 320.54t, which was 6% higher than the volume supplied in the same month of 2016. While the average supply of tomatoes in the 1st quarter of 2017 (307t) compared to the 1st quarter of 2016 (288t) showed an increase of 7%.

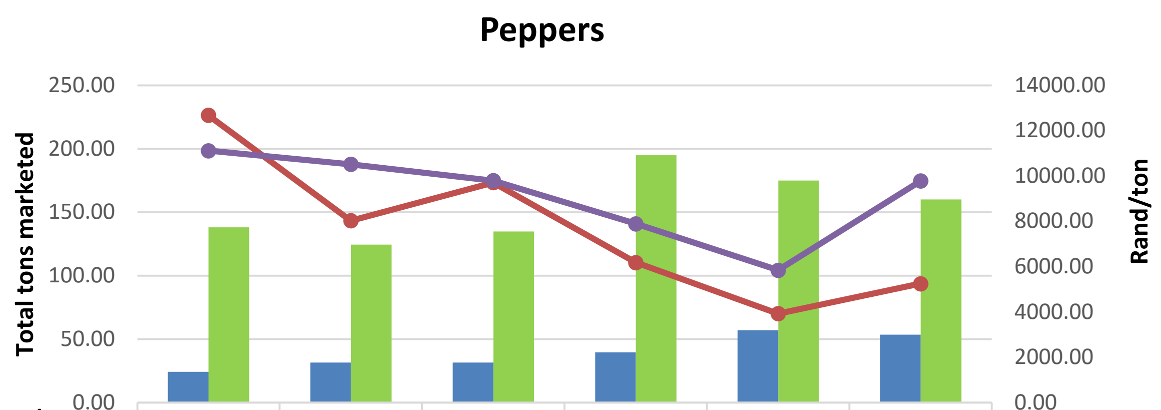
- Tomato prices were the highest in March 2017 worth the value of R6, 193.80/t, which was 15% higher compared to the value of tomatoes in the same month of 2016. While the average price of tomatoes supplied in the 1st quarter of 2017 (R5, 781/t) compared to the 1st quarter of 2016 (R6, 039/t) showed a slight decline of 4%.

Durban

- Tomatoes marketed in this market were highest in March 2017 at 1, 565.61t, which was 10% lower than the volume supplied in the same month of 2016. The average supply of tomatoes in the 1st quarter of 2017 (1, 484t) compared to the 1st quarter of 2016 (1, 667t) showed a decrease of 11%.

- Tomato prices were the highest in March 2017 valued at R7, 005.57/t, which was 33% higher compared to the value of tomatoes in the same month of 2016. The average price of tomatoes in the 1st quarter of 2017 was R6, 574/t, showing a 13% increase from average of R5, 842/t in the same quarter of 2016.

2.11. PEPPERS



Months	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	24.01	31.48	31.42	39.55	57.03	53.43
DBN T	138.07	124.39	134.63	194.85	174.90	160.06
PMB R/T	12675.33	8023.79	9702.73	6173.71	3917.65	5245.95
DBN R/T	11112.27	10512.36	9786.72	7884.51	5837.71	9779.31

Figure 11: Trends for Pepper in DBN and PMB FPM (2016 and 2017 Q1)

Pietermaritzburg

- The supply of peppers was highest in February 2017 at 57.03t, which was 81% higher than the volume supplied in the same month of 2016. The average supply of peppers in the 1st quarter of 2017 (50t) was 72% higher than the 1st quarter of 2017 average of 2016 (29t).

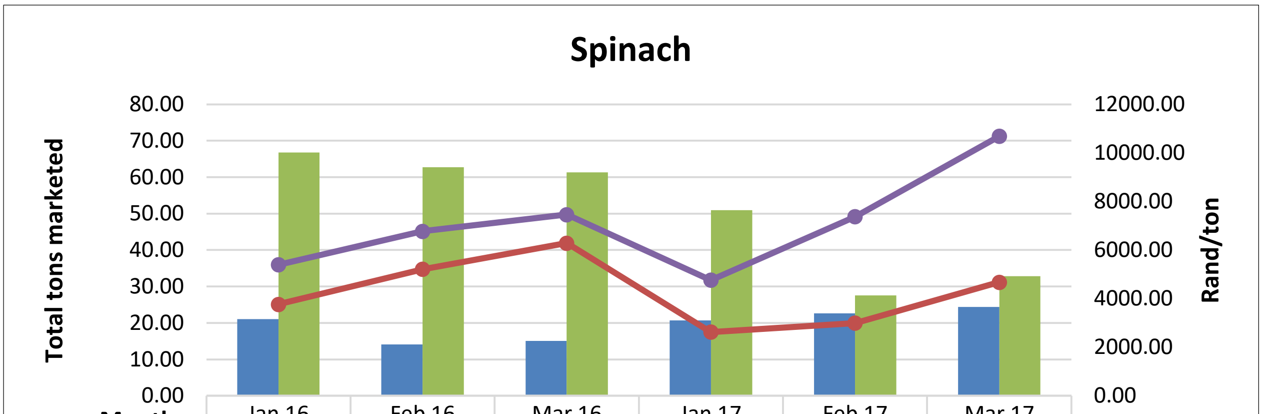
- The price of peppers was highest in January 2017 worth the value of R6, 173.71/t, which was 51% lower than the value of peppers in the same month of 2016. The average price of peppers supplied in the 1st quarter of 2017 (R5, 112/t) decreased by 50% compared to the 1st quarter of 2016 (R10, 133.95/t).

Durban

- Volumes of peppers sold through this market were highest in January 2017 at 194.85t, which was 41% higher than the volume supplied in the same month of 2016. The average supply of peppers in the 1st quarter of 2017 (177t) increased by 33% compared to the 1st quarter of 2016 (133t).

- The price of peppers was highest in March 2017 worth the value of R9, 779.31/t, which was R9.00 higher than the price of peppers in the same month of 2016. The average price of peppers in the 1st quarter of 2017 (R7, 834/t) decreased by 25% compared to the 1st quarter of 2016 (R10, 471/t)

2.12. SPINACH



Months	Jan 16	Feb 16	Mar 16	Jan 17	Feb 17	Mar 17
PMB T	21.05	14.12	15.10	20.68	22.67	24.37
DBN T	66.81	62.74	61.28	50.90	27.55	32.79
PMB R/T	3765.06	5213.25	6286.43	2623.62	2998.21	4677.96
DBN R/T	5396.49	6773.32	7459.19	4763.80	7374.74	10683.80

Figure 12 Trends for English cucumber in DBN and PMB FPM (2016 and 2017 Q1)

Pietermaritzburg

- The supply of Spinach was the highest in March 2017 at 24.37t, which was 61% higher than the volume supplied in the same month of 2016. The average supply of Spinach in this market decreased by 33% from 17t in 2016 to 23t in 2017.

- The price of Spinach was highest in March 2017 at R4, 677.96/t, which was 26% lower compared to the value of Spinach in the same month of 2016. The average price of Spinach supplied in the 1st quarter of 2017 decreased by 33% compared to the 2016 quarter 1 average of R5, 088/t.

Durban

- Spinach supply was highest in January 2017 at 50.90t, which was 24% lower than the volume supplied in the same month of 2016. The average supply of Spinach in the 1st quarter of 2017 (36.01t) is was 42% lower than the average supply at the same time in 2016.

- Price of Spinach was highest in March 2017 at R10, 683.80/t which showed a 43% increase from the R7, 459.19/t recorded in the same month of 2016.The average price of Spinach in the Durban FPM increased by 17% from R6, 543/t in 1st quarter of 2016 to R7, 607/t in the same quarter of 2017.

Fresh Produce Market Analysis Report for Quarter 1 (Jan-Mar 2017)

Compiled by: **Ms LC Sibisi** Agricultural Economist: Marketing Sub-directorate Directorate: Economics, Marketing and Value Adding	Verified by: **Ms Z Mazibuko** Deputy Director: Marketing Sub-directorate Directorate: Economics, Marketing and Value Adding