



agriculture & rural development

Department:
agriculture
& rural development
PROVINCE OF KWAZULU-NATAL



Fresh Produce Market Analysis Report for Quarter 3 (July-Sept 2016)

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1. INTRODUCTION

The purpose of this publication is to present a quarterly analysis of KwaZulu-Natal (KZN) Fresh Produce Markets volumes, prices and trends for 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. The selection is guided by the natural resource base of KwaZulu-Natal and area under production within KZN as well as marketed volumes. The interval covered in this issue is quarter by 3 of 2015 (July- September 2015) which will be compared with Quarter 3 of 2016 (July- September 2016).

This document focuses only on the following commodities: potatoes, sweet potatoes, onions, 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

Comparing the 3rd quarter of 2015 to the 3rd quarter of 2016 volumes have improved in both markets showing that leading changes were in 71% increase for cabbages, 27% increase for tomatoes and 23% decline for potatoes in the Pietermaritzburg Fresh Produce Market. For the Durban Fresh Produce Market major changes in volumes were 73% increase in gem squashes, 54% increase for pumpkins and 46% increase for English Cucumbers. In terms of prices the main movements were observed in Sweet potatoes (increase of 65%), Onions (increase of 52%) and Potatoes (increase by 48%) for the Pietermaritzburg Fresh Produce Market. Whereas in the Durban Fresh Produce markets major price changes were observed in Sweet potatoes (decrease of 55%), onions (increase of 52%) and Potatoes (increase of 43%).

Prices have not responded as in the expected direction and in line with the most affected crops when it comes to movements in volumes. Sweet potatoes prices showed highest response in prices for both markets, 55% decline for Durban and 65% increase for PMB. The Pietermaritzburg FPM remains the most volatile market in terms of quantities and price fluctuations.

A detailed analysis and discussion is presented herein for the various fresh produce in both Pietermaritzburg and Durban Fresh Produce Markets, comparing July-September 2015 to July-September 2016.

2.1. POTATOES

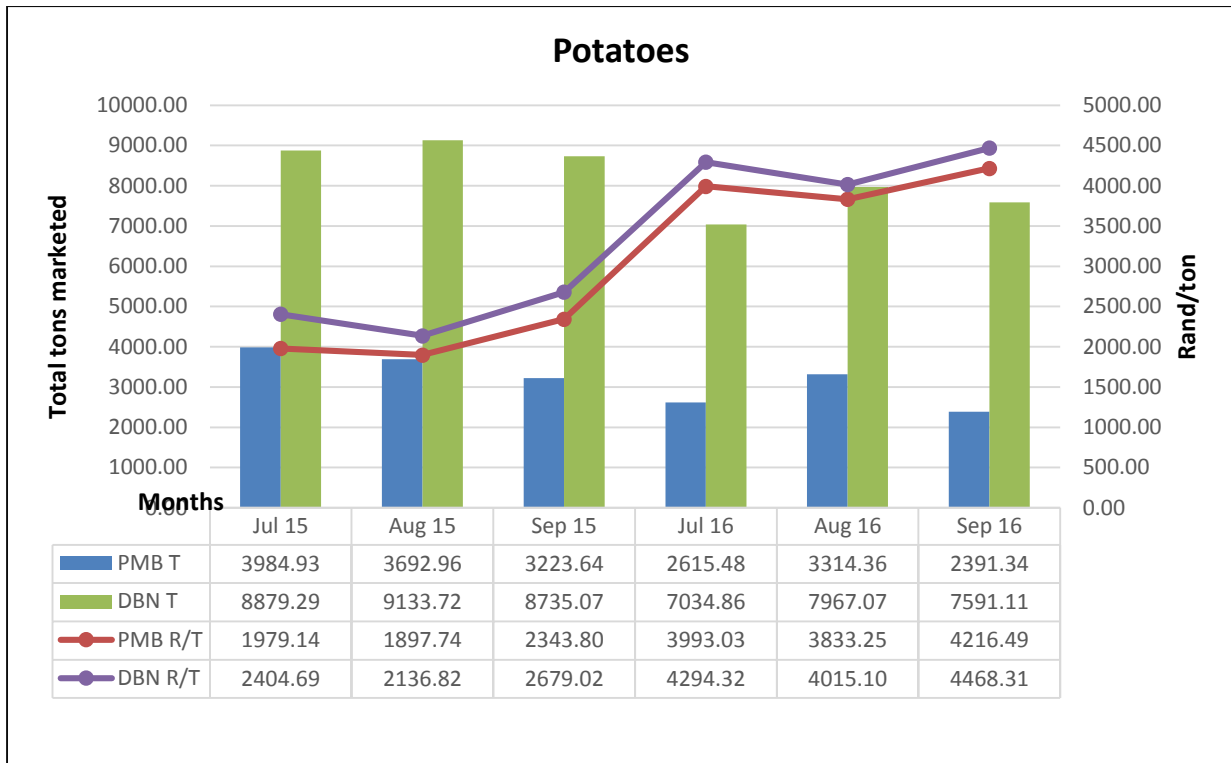


Figure 1: Trends for potatoes in PMB and DBN FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of potatoes was highest in August 2016 at 3 314.36 tons, which was 10% lower than the volume supplied in the same month of 2015, while the average supply of potatoes in the 3rd quarter of 2016 is R2, 773.72/t this shows a 23% decrease in average volumes from Q3 of 2015 which was 3, 633.84t. The price of potatoes was highest in September 2016 worth the Value of R4, 216.49/t, which was 44% higher than the value of potatoes in the same month of 2015 which was at R2, 343.80. On average, the potato price rose by 48% comparing Q3 (2015) at R2, 073.56/t and Q3 (2016) at R4, 014.25/t.

- **Durban**

In Durban FPM, the supply of potatoes was highest in August 2016 at 7, 967.07 tons, which was 12% lower than the volume supplied in the same month of 2015, while the average supply of potatoes in the 3rd quarter of 2016 (7,531.01t) compared to the 3rd quarter of 2015 (8,916.02) a decrease of 15%. The price of potatoes was highest in September 2016 worth the value of R4, 468.31/t which was 40% higher compared to the value of potatoes in the same month of 2015. The average price of potatoes in the 3rd quarter of 2016 (R4, 259.24/t) compared to the 3rd quarter of 2015 (R2, 406.85/t) increased by 43%.

2.2. SWEET POTATOES

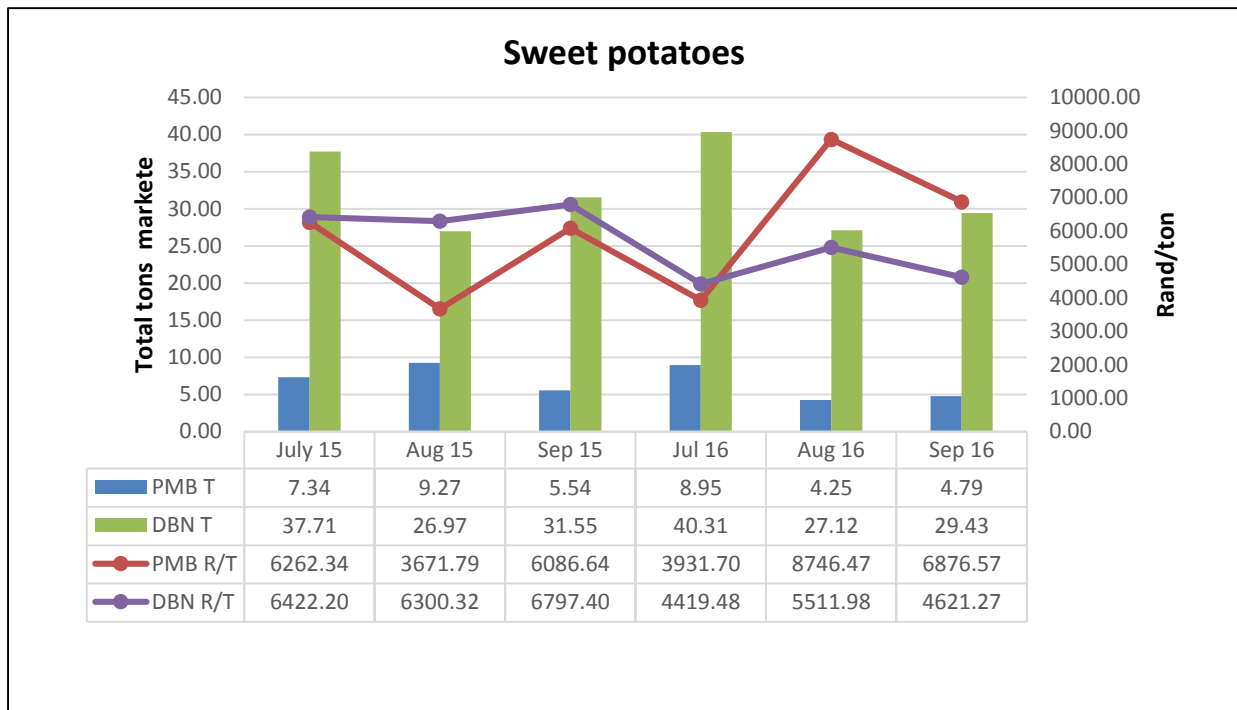


Figure 2: Trends for sweet potatoes in PMB and DBN FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of sweet potatoes was highest in July 2016 at 8.95t, which was 17% higher than the volume supplied in the same month of 2015. The average supply of sweet potatoes in the 3rd quarter of 2016 (5.9t) compared to the 3rd quarter of 2015 (7.4t) decreased by 18%. Sweet Potato prices were highest in August 2016 at R8, 746.47/t, which was 58% higher compared to the value of sweet potatoes in the same month of 2015, while the average price of sweet potatoes in the 3rd quarter of 2016 (R6, 518.24/t) compared to the 3rd quarter of 2015 (R5, 340.26/t) increased by 65%.

- **Durban**

In Durban FPM, the supply of sweet potatoes was highest in July 2016 at 40.31t, which was 6% higher than the volume supplied in the same month of 2015. While the average supply of sweet potatoes in the 3rd quarter of 2016 (32.29t) compared to the 3rd quarter of 2015 (32.07t) increased by 0.6%. The price of sweet potatoes was highest in August 2016 worth the value of R5, 511.98/t, which was 12% less compared to the value of sweet potatoes in the same month of 2015, while the average price of sweet potatoes in the 3rd quarter of 2016 (R4, 850.91/t) compared to the 3rd quarter of 2015 (R6, 506.64/t) decreased by 25%.

2.3. ONIONS

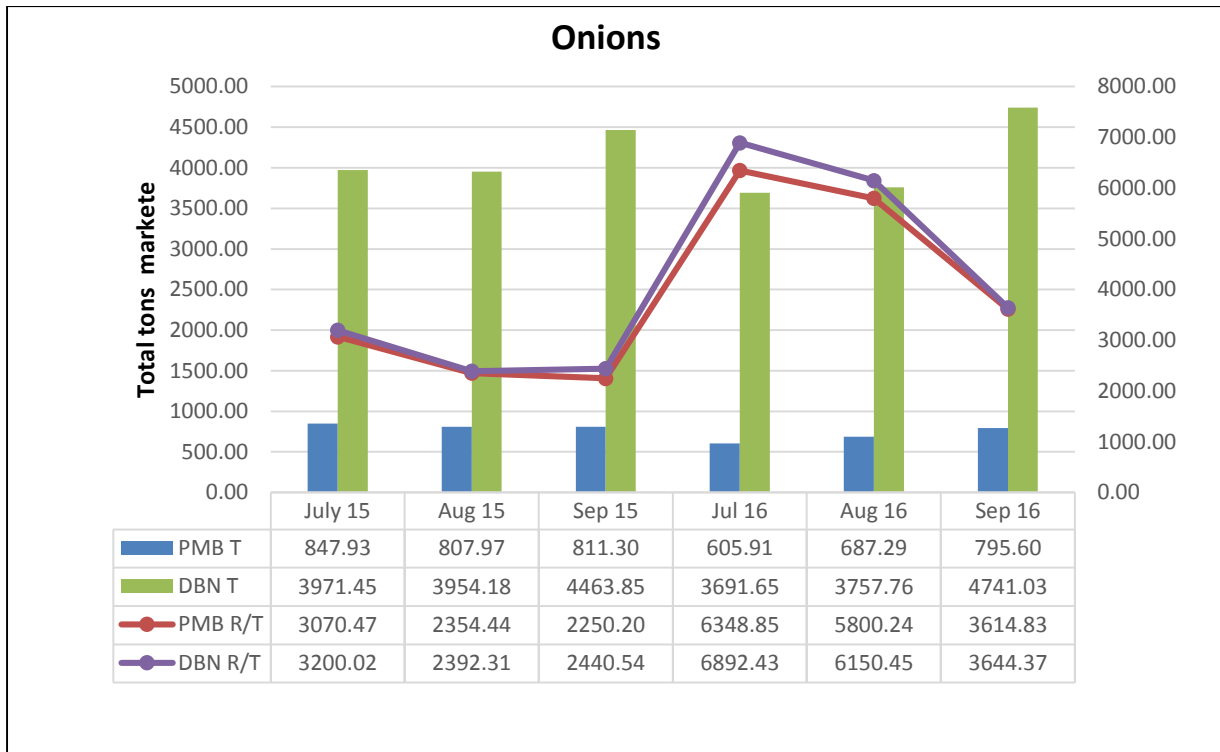


Figure 3: Trends for onions in PMB and DBN FPM (2015 and 2016 Q3)

● Pietermaritzburg

In Pietermaritzburg FPM, the supply of onions was highest in September 2016 at 795.60t, which was 1.2% less than the volume supplied in the same month of 2015, while the average supply of onions in the 3rd quarter of 2016 (696.26t) compared to the 3rd quarter of 2015 (822.39t) decreased by 15%. The price of onions was highest in July 2016 worth the value of R6, 348.85/t, which is 52% higher compared to the value of onions in the same month of 2015, while average price of onions in the 3rd quarter of 2016 (R5, 254.63/t) compared to the 3rd quarter of 2015 (R2, 558.37/t) increased by 51%.

● Durban

In Durban FPM, the supply of onions was highest in September 2016 at 4741.03t, which was 5.8% higher than the volume supplied in the same month of 2015, while the average supply of onions in the 3rd quarter of 2016 (4063.47t) compared to the 3rd quarter of 2015 (4126.83t) decreased by 2%. Onion prices were highest in July 2016 worth the value of R6, 892.43/t, which was 54% higher compared to the value of onions in the same month of 2015, while the average price of onions in the 3rd quarter of 2016 (R5,562.41/t) compared to the 3rd quarter of 2015 (R2, 677.62/t) increased by 52%.

2.4. CARROTS

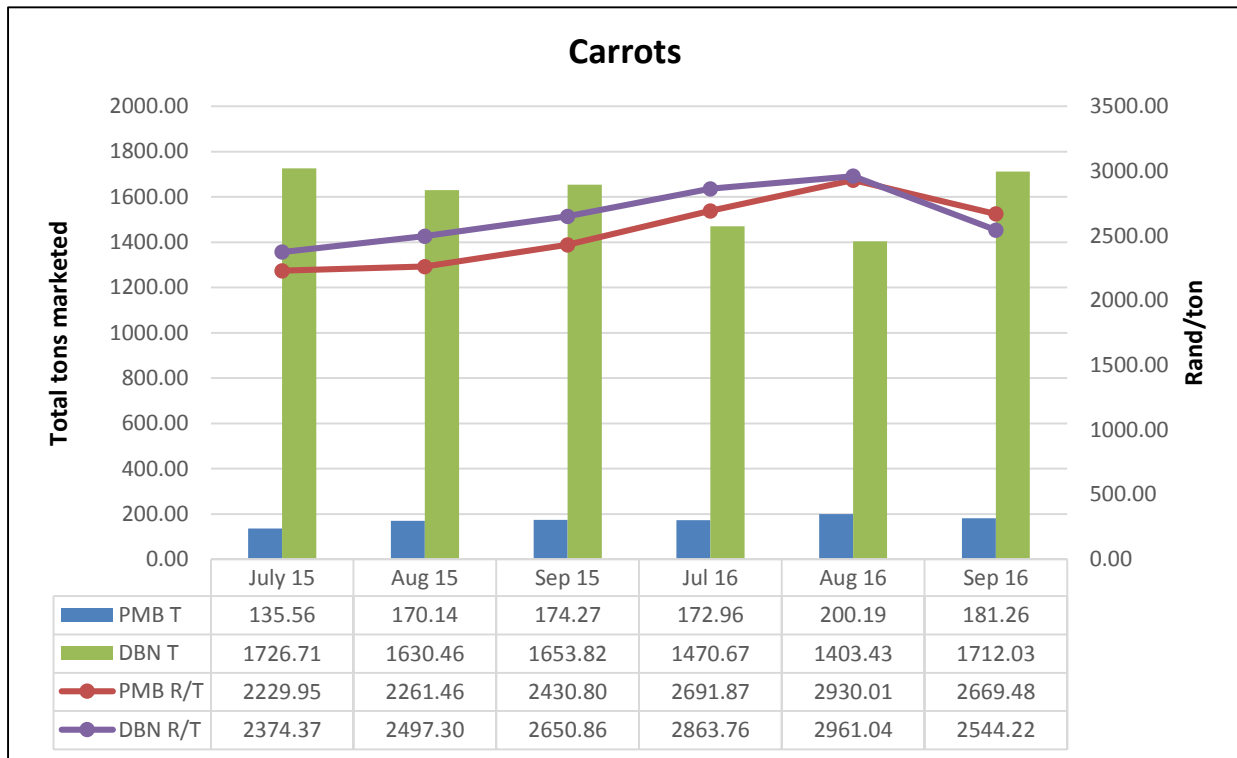


Figure 4: Trends for carrots in PMB and DBN FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of carrots was highest in August 2016 at 200.19t, which was 15 % higher than the volume supplied in the same month of 2015. While, the average supply of carrots in the 3rd quarter of 2016 (184.80t) compared to the 3rd quarter of 2015 (159.98t) increased by 13%. Carrot prices were the highest in August 2016 at R2, 930.01/t, which was 23% higher compared to the price of carrots in the same month of 2015. While, the average price of carrots increased by 17% from R2, 307.40/t in the 3rd quarter of 2015 to R2, 763.78/t in the 3rd quarter of 2016.

- **Durban**

In Durban FPM, the supply of carrots was highest in September 2016 at 1, 712.03t, which was 3% higher than the volume supplied in the same month of 2015. While, the average supply of carrots in the 3rd quarter of 2016 (1, 528.71t) compared to the 3rd quarter of 2015 (1, 670.33t) a decreased of 8%. Carrot prices were the highest in August 2016 at of R2, 930.01/t, which was 23% higher compared to the value of carrots in the same month of 2015. While, the average price of carrots increased by 10% from R2, 507.51/t in the 3rd quarter of 2015 to R2, 789.68/t in the 3rd quarter of 2016.

2.5. CABBAGE

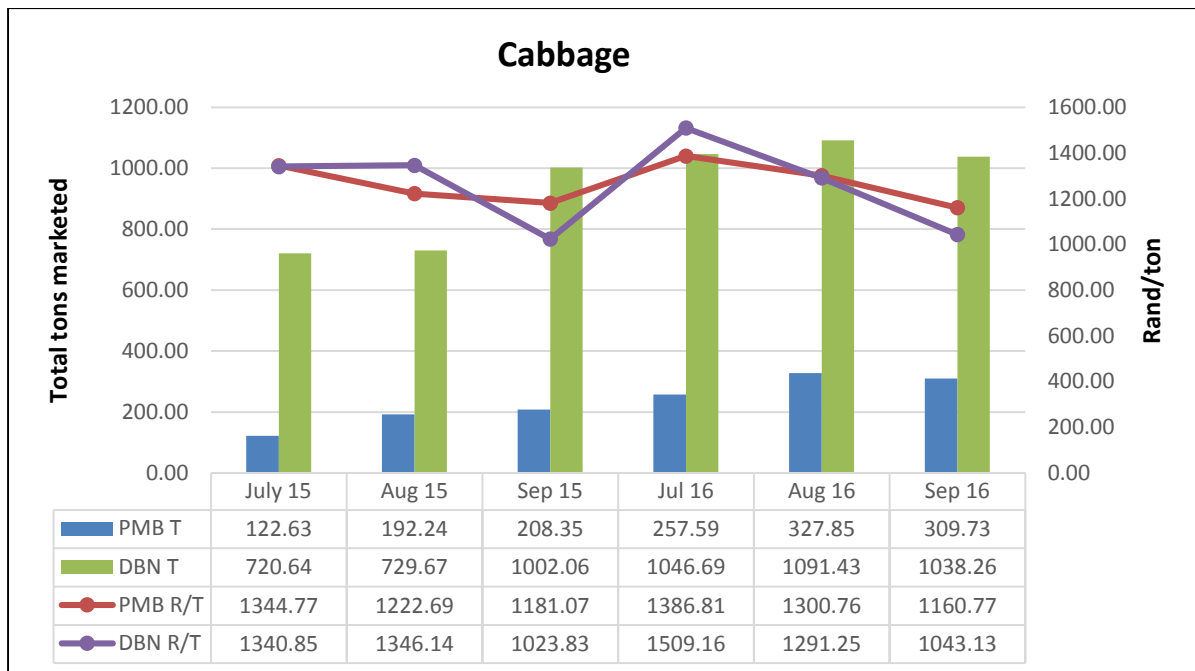


Figure 5: Trends for cabbage in PMB and DBN FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of cabbage was highest in September 2016 at 309.73t, which was 33% higher than the volume supplied in the same month of 2015. While, the average supply of cabbage in the 3rd quarter of 2016 (298.39t) compared to the 3rd quarter of 2015 (174.40t) increased by 71%. Cabbage prices were the highest in July 2016 worth R1, 386.81/t, which was 3% higher compared to the value of cabbage in the same month of 2015. The average price of cabbages in the 3rd quarter of 2016 (R1, 282.78/t) compared to the 3rd quarter of 2015 (R1, 249.51/t) an increase of 3%.

- **Durban**

In Durban FPM, the supply of cabbage was highest in September 2016 at 1,038.26t, which was 3.48% higher than the volume supplied in the same month of 2015. While, the average supply of cabbage in the 3rd quarter of 2016 (1058.79t) compared to the 3rd quarter of 2015 (817.45t) increased by 23%. Cabbage price was the highest in July 2016 worth the value of R1, 509.16 /t, which was 11% higher compared to the value of cabbages in the same month of 2015. The average price of cabbages in the 3rd quarter of 2016 (R1, 281.18/t) compared to the 3rd quarter of 2015 (R1, 236.94/t) increased by 3%.

2.6. LETTUCE

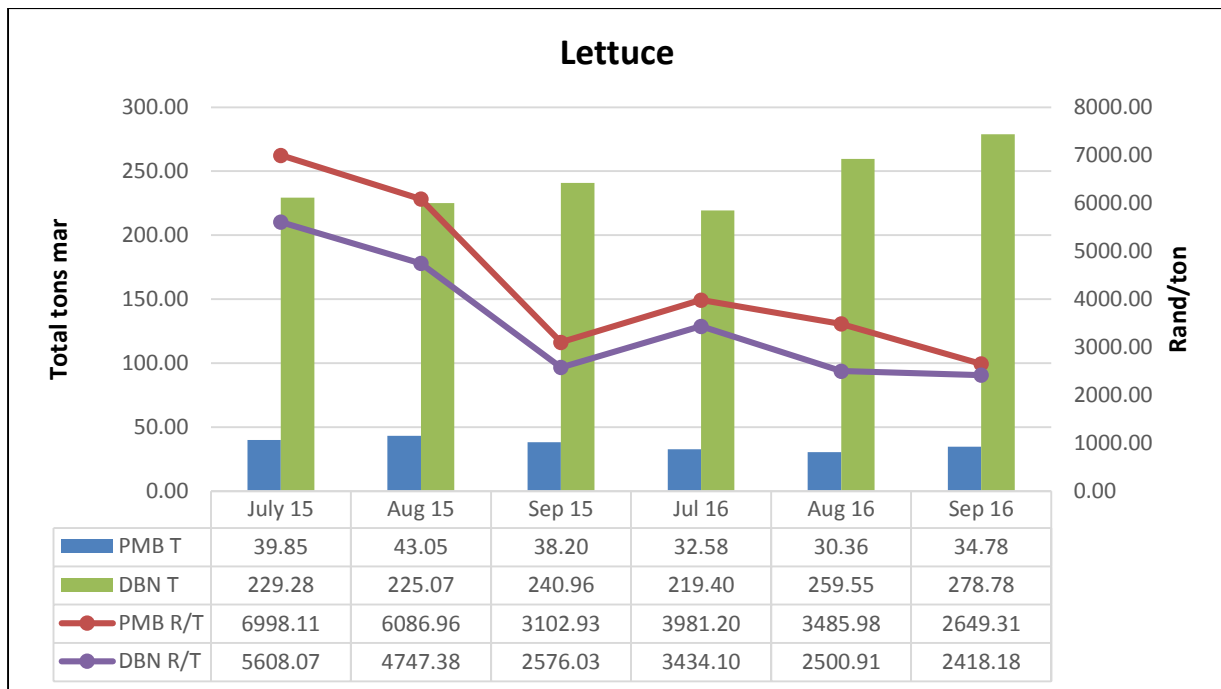


Figure 6: Trends for lettuce in PMB and DBN FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of lettuce was highest in September 2016 at 34.78t, which was 9% lower than the volume supplied in the same month of 2015. While, the average supply of lettuce in the 3rd quarter of 2016 (32.57t) compared to the 3rd quarter of 2015 (40.37t) this is a decreased of 19%. The price of lettuce was the highest in July 2016 worth the value of R3, 981.20/t, which was 43% lower compared to the value of lettuce in the same month of 2015. While, the average price of lettuce in the 3rd quarter of 2016 (R3, 372.16/t) compared to the 3rd quarter of 2015 (R4, 310.49/t) a decline of 22%.

- **Durban**

In Durban FPM, the supply of lettuce was highest in September 2016 at 278.78t, which was 14% higher than the volume supplied in the same month of 2015. While, the average supply of lettuce increased by 8% from 231.77t to the 3rd quarter of 2015 to 252.58t in the 3rd quarter of 2016. Lettuce prices were the highest in July 2016 worth R3, 434.10/t, which was 39% lower compared to the value of lettuce in the same month of 2015. While, average price of lettuce in the 3rd quarter of 2016 were R2, 784.40/t there was a recorded decline of about 35% from R4, 310.19/t in the 3rd quarter of 2015.

2.7. PUMPKINS

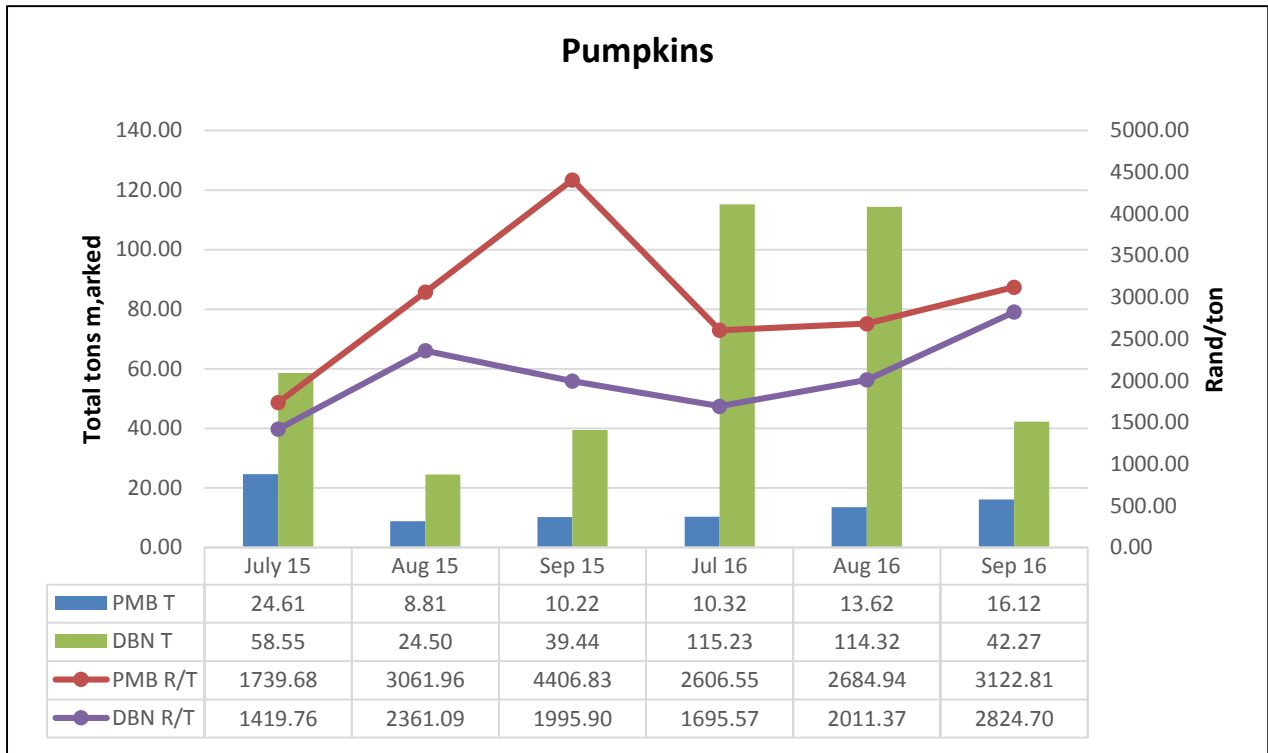


Figure 7: Trends for pumpkins in PMB and DBN FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Durban FPM, the supply of pumpkins was highest in September 2016 at 16.12t, which was 37% higher than the volume supplied in the same month of 2015. While, the average supply of pumpkins in the 3rd quarter of 2016 (13.35t) compared to the 3rd quarter of 2015 (14.5t) a decline of 8%. The price of pumpkins was highest in September 2016 at R3, 122.81/t, which was 29% lower compared to the value of pumpkins in the same month of 2015. The average price of pumpkins decreased by 9% from R3, 069.5/t in 3rd quarter of 2015 to R2, 804.8/t in the 3rd quarter of 2016.

- **Durban**

In Durban FPM, the supply of pumpkin was highest in July 2016 at 115.23t, which was 50% higher than the volume supplied in the same month of 2015. While the average supply of pumpkins in the 3rd quarter of 2016 (90.60t) increased by 54% from 40.82t to 90.6t. Pumpkin prices were the highest in September 2016 at R2, 824.70 /t, which was 29% higher compared to the value of pumpkins in the same month of 2015. While, the average price of pumpkins in the 3rd quarter of 2016 (R2, 177.21t) compared to the 3rd quarter of 2015 (R1, 925.58/t) increased by 12%.

2.8. GEM SQUASHES

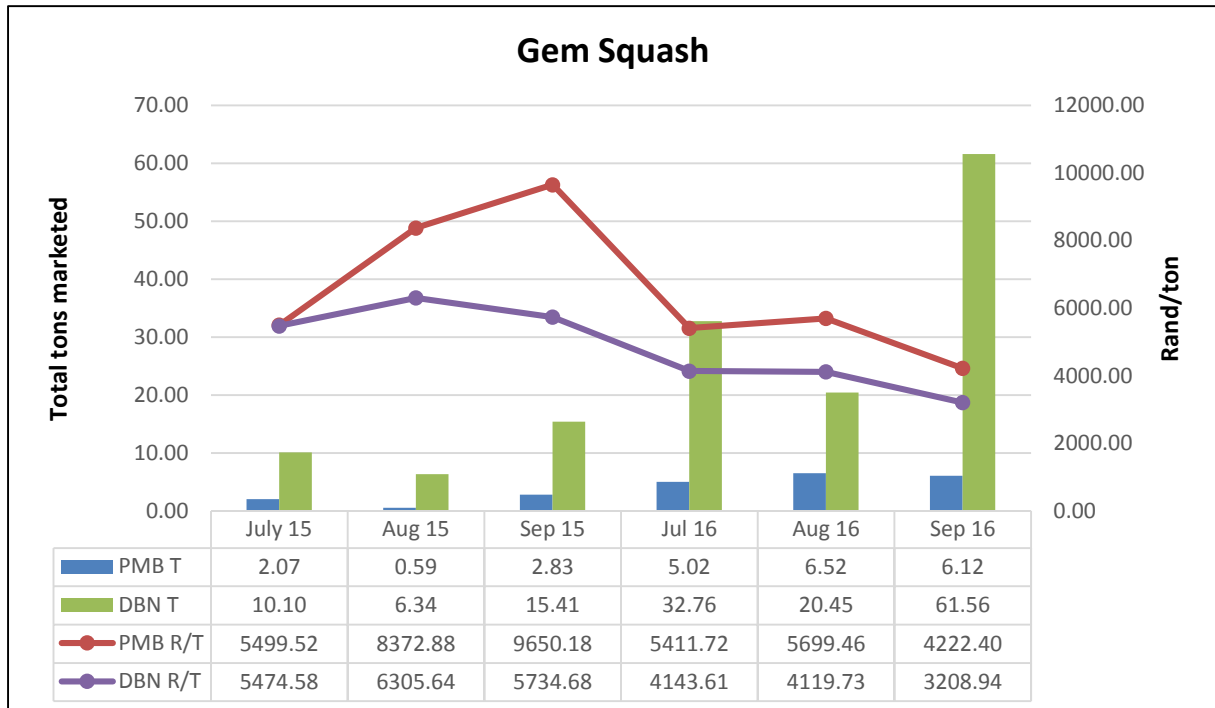


Figure 8: Trends for gem squashes in PMB and DBN FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of gem squashes was highest in August 2016 at 6.52t, which was 11 times than the volume supplied in the same month of 2015. While the average supply of gem squashes in the 3rd quarter of 2016 was 5.89t and 1.83t for the 3rd quarter of 2015, this is a major increase of about 3 times on average volumes for gem squashes over this time of the year. The price of germ squashes was highest in August 2016 worth the value of R5, 699.46/t, which was 32% lower compared to the value of germ squashes in the same month of 2015. The average price of germ squashes supplied in the 3rd quarter of 2016 (R5, 111.19/t) compared to the 3rd quarter of 2015 (R5, 838.3/t) decreased by 20%.

- **Durban**

In Durban FPM, the supply of germ squashes was highest in September 2016 at 61.56t, which was 75% higher than the volume supplied in the same month of 2015. The average supply of germ squashes in the 3rd quarter of 2016 (38.26t) compared to the 3rd quarter of 2015 (10.62t) increased by 73%. The price of germ squashes was highest in July 2016 worth R4, 143.61/t, which was 24% lower compared to the value of germ squashes in the same month of 2015. On average from the 3rd quarter of 2015, prices increased by 35% from R5838.3/t to R3, 824.09/t.

2.9. BUTTERNUT SQUASHES

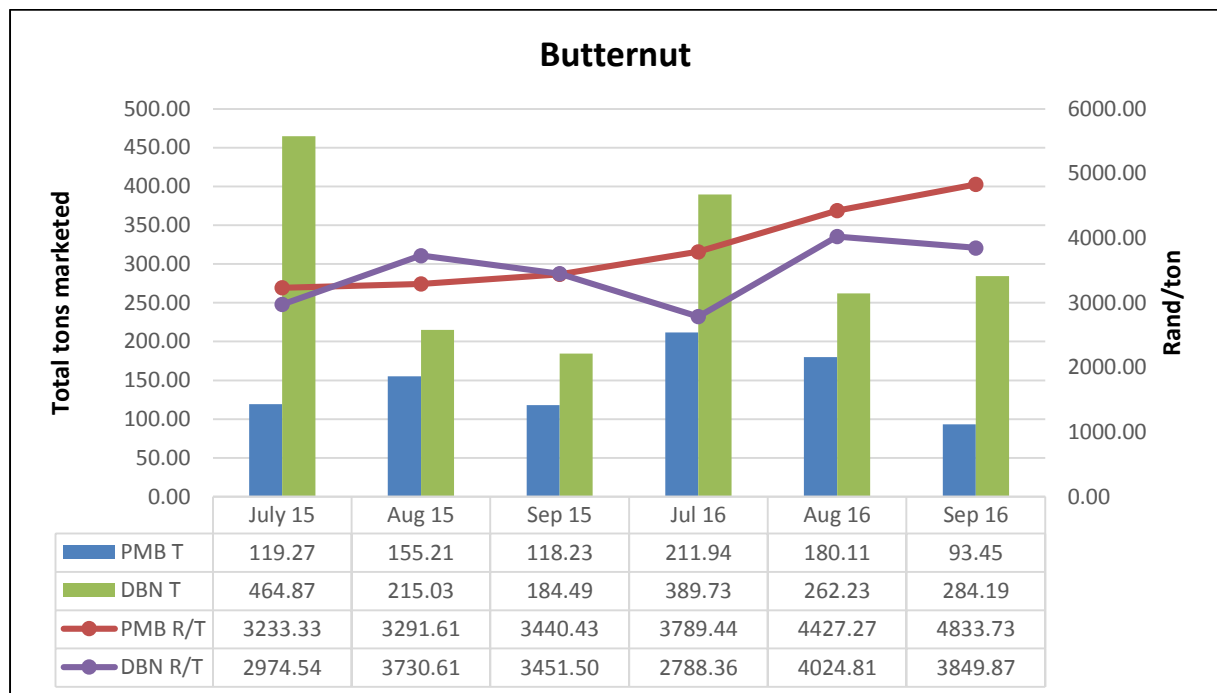


Figure 9: Trends for butternut squashes in DBN and PMB FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of butternut squashes was highest in July 2016 at 211,94t, which was 44% higher than the volume supplied in the same month of 2015. The average supply of butternut squashes in the 3rd quarter of 2016 was 161.83t compared to the 3rd quarter of 2015 130.90t shows an increase of 19%. The price of butternut squashes was highest in September 2016 at R4, 833.73/t which was 40% higher compared to the value of butternut squashes in the same month of 2015. The average price of butternut squashes supplied in the 3rd quarter of 2016 (R4, 350.15/t) compared to the 3rd quarter of 2015 (R3, 321.79/t) an increase of 31%.

- **Durban**

In Durban FPM, the supply of butter squashes was highest in July 2016 at 389.73t, which was 16% lower than the volume supplied in the same month of 2015. The average supply of butternut squashes in the 3rd quarter of 2016 (312.05t) compared to the 3rd quarter of 2015 (288.13t) increased by 8%. The price of germ squashes was highest in June 2016 worth the value of R4, 024.81/t, which was 7% higher compared to the value of butternut squashes in the same month of 2015. While the average price of butternut squashes supplied in the 3rd quarter of 2016 (R3, 554.35/t) compared to the 3rd quarter of 2015 (R3, 385.55/t) decreased by 5%.

2.10. TOMATOES

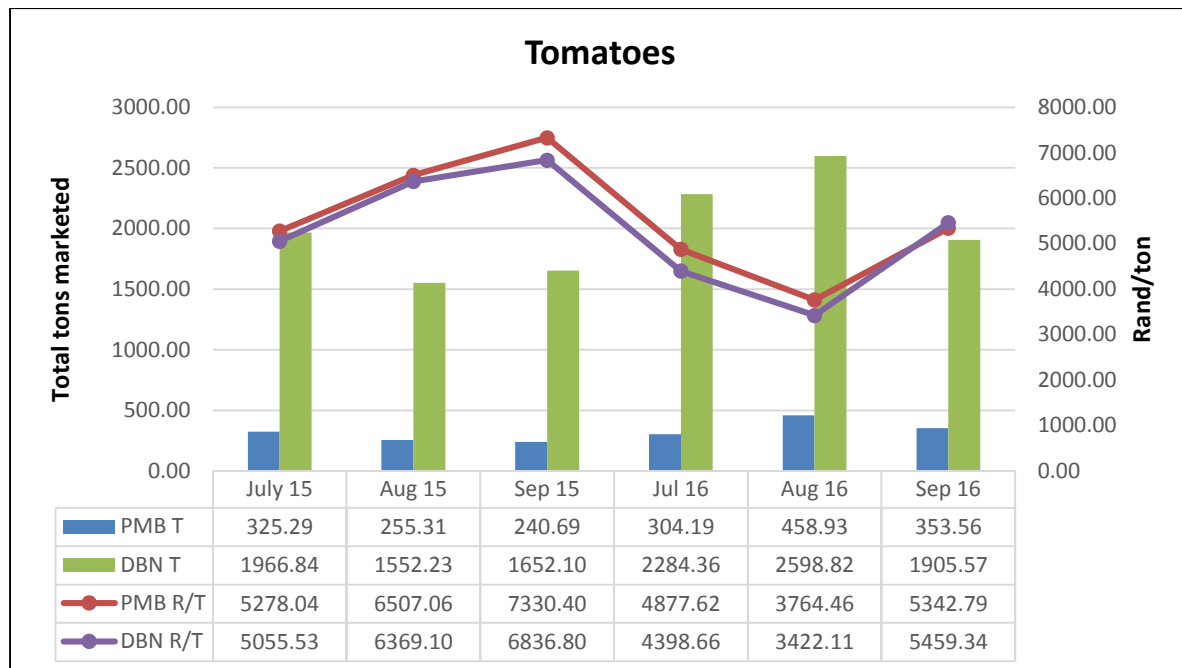


Figure 2: Trends for tomatoes in DBN and PMB FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of tomatoes was highest in August 2016 at 458.93t, which was 44% higher than the volume supplied in the same month of 2015. While the average supply of tomatoes in the 3rd quarter of 2016 (371.23t) compared to the 3rd quarter of 2015 (273.76t) increased by 27%. Tomato prices were the highest in September 2016 worth the value of R5, 342.79/t, which was 27% higher compared to the value of tomatoes in the same month of 2015. While the average price of tomatoes supplied in the 3rd quarter of 2016 (R4, 661.62/t) compared to the 3rd quarter of 2015 (R6, 371.83/t) slightly decreased by 27%.

- **Durban**

In Durban FPM, the supply of tomatoes was highest in August 2016 at 2, 598.82t, which was 67% higher than the volume supplied in the same month of 2015. The average supply of tomatoes in the 3rd quarter of 2016 (2, 262.92t) compared to the 3rd quarter of 2015 (1, 723.72t) increased by 24%. Tomato prices were the highest in September 2016 valued at R5, 459.34/t, which was 20% lower compared to the value of tomatoes in the same month of 2015. The average price of tomatoes in the 3rd quarter of 2016 was R4, 426.70/t, showing a 27% decline from average of R6, 087.14/t in the same quarter of 2015.

2.11. PEPPERS

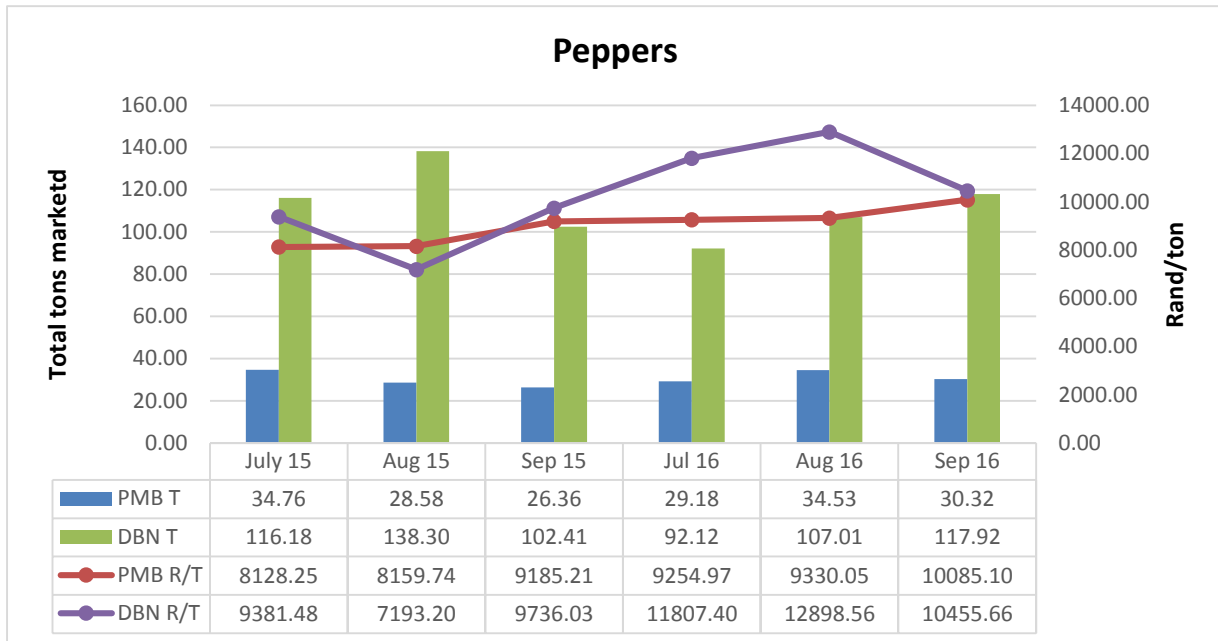


Figure 30: Trends for Pepper in DBN and PMB FPM (2015 and 2016 Q3)

- **Pietermaritzburg**

In Pietermaritzburg FPM, the supply of peppers was highest in August 2016 at 34.53t, which was 17% higher than the volume supplied in the same month of 2015. The average supply of peppers in the 3rd quarter of 2016 (31.34t) was 5% higher compared to the 3rd quarter of 2015 (29.9t). The price of peppers was highest in September 2016 worth the value of R10, 455.66/t, which was 9% higher compared to the value of peppers in the same month of 2015. The average price of peppers supplied in the 3rd quarter of 2016 (R9, 556.71/t) decreased by 11% compared to the 3rd quarter of 2015 (R8, 491.7/t).

- **Durban**

In Durban FPM, the supply of peppers was highest in September 2016 at 117.92t, which was 15% lower than the volume supplied in the same month of 2015. The average supply of peppers in the 3rd quarter of 2016 (105.68t) decreased by 11% compared to the 3rd quarter of 2015 (118.96t). The price of peppers was highest in August 2016 worth the value of R12, 898.56/t, which was 79% higher compared to the value of pepper in the same month of 2015. The average price of peppers in the 3rd quarter of 2016 (R11, 720.54/t) increased by 17% compared to the 3rd quarter of 2015 (R9, 770.23/t).

2.12. ENGLISH CUCUMBER

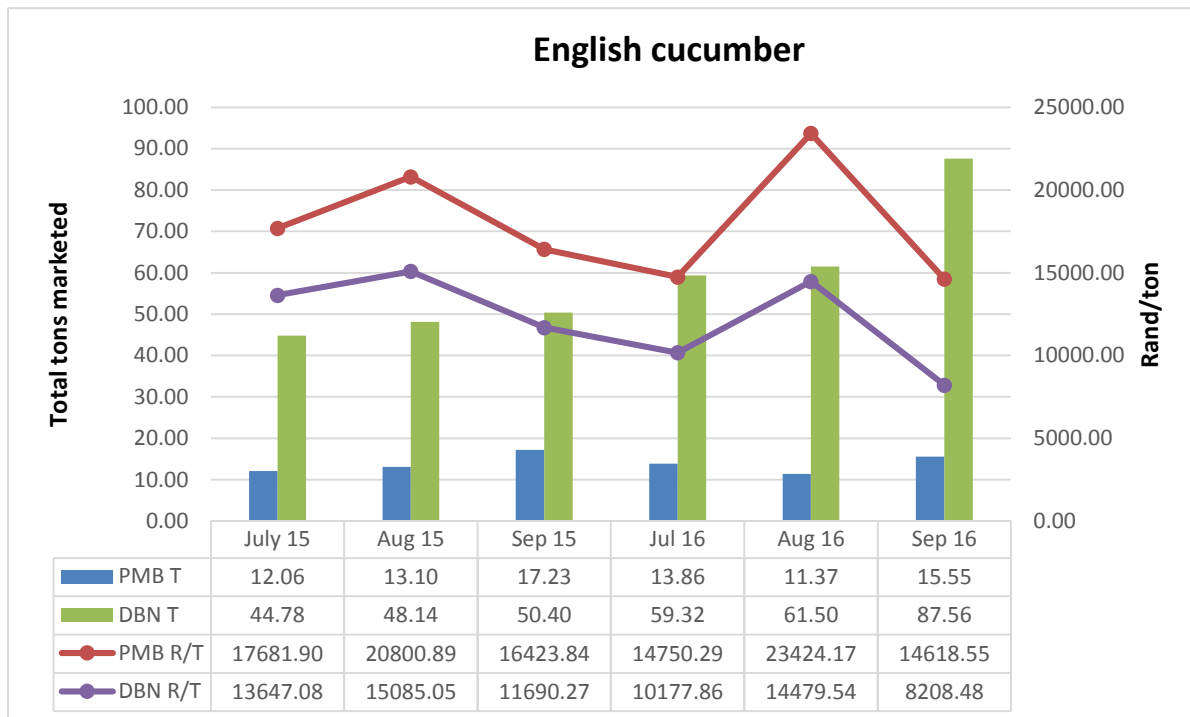


Figure 11 Trends for English cucumber in DBN and PMB FPM (2015 and 2016 Q3)

● Pietermaritzburg

In Pietermaritzburg FPM, the supply of English cucumbers was the highest in September 2016 at 15.55t, which was 10% lower than the volume supplied in the same month of 2015. The average supply of English cucumbers declined by 4% in the 3rd quarter of 2016 (13.59t) from in the 3rd quarter of 2015 (14.13t). The price of English cucumbers was highest in August 2016 at R23, 424.17/t, which was 22% higher compared to the value of English cucumbers in the same month of 2015. The average price of English cucumbers supplied in the 3rd quarter of 2016 (R17, 597.67/t) compared to the 3rd quarter of 2015 (R13, 474.13/t) increased by 23%.

● Durban

In Durban FPM, the supply of English cucumbers was highest in September 2016 at 87.56t, which was 74% higher than the volume supplied in the same month of 2015. The average supply of English cucumbers in the 3rd quarter of 2016 (69.5t) is 46% higher than average supply at the same time in 2015. The price of English cucumbers was highest in August 2016 at R14, 479.54/t which shows a 4% decline from the same month in 2015. The average price of English cucumbers in the Durban FPM declined by 19% from R13, 474/t in 3rd quarter of 2015 to R10, 954/t in the same quarter of 2016.

DISCLAIMER:

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Fresh Produce Market Analysis Report for Quarter 3 July-September 2016)

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