

# TRANSFORMING THE FRESH PRODUCE SECTOR IN SOUTH AFRICA: TOWARDS INCLUSIVITY AND GROWTH

## 1 SECTOR AT A GLANCE



Jobs Created: **820,000** (direct and indirect)

Annual Production: **11+ million tonnes**



Volume through NFPMs: **3.4 million tonnes**



Total Sector Value (2023): **R32.4 billion**

NFPMs Revenue

2019 **R17 billion**

2022 **R21 billion**

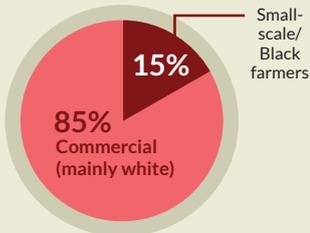
2023 **R25 billion**



Hectares under Horticulture: **662,000 ha**

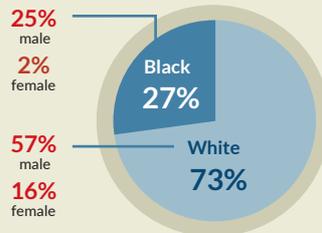
## 2 WHO'S SELLING?

Current Farmer Supply Share



Target for 2030 **30%** from black farmers

Market Agent Demographics



Revenue Share by White Agents **98%** (≈R15.8 billion)

## 3 MARKET POWER & ACCESS



TOP 4 MARKETS

Top 4 Markets: Johannesburg, Tshwane, Durban, Cape Town

**84%** sales



Small Markets:

**Only 1%** of sales

Infrastructure Age: **40+ years old**



Funding Gap: **R9.4 billion** needed (NAMC Project Rebirth)



Municipal Tax: **5% of NFPM** revenue (often misallocated)

## 4 STRUCTURAL BARRIERS



## 5 TECHNOLOGY AND WASTE

DIGITAL DIVIDE

Commercial farmers

Smallholders



**High tech use**



**Limited access to AgriTech platforms**



Produce Waste (Tshwane Market) **5,000 tons/year**



Need for Baseline Study **Understand tech usage gaps**

## 6 CALL TO ACTION



TRANSFORMATION IS ESSENTIAL

Invest in infrastructure

Reform market agency structures

Boost digital inclusion

Unlock unused land



Build resilient local markets



Enhance black farmer participation



KAGISO TRUST

40 YEARS 1985-2025