Regoverning Markets | Policy Brief 4

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The role of Fresh Produce Markets in South Africa

Context

This policy brief forms part of the Recovering Markets study in Southern Africa. It has endeavored to analyse market concentration in the food processing and retail sectors, as well as to predict future dynamics in the sectors which have emerged as a result of the restructuring of the food market and the rapid changes taking place in the structure and governance of local, national and regional agri-food markets and the implications of the changes for small/medium producers in the restructuring of the food industry, together with the implications for policies and programmes within the context of the agri-food market.

Key points

- Initially the role of fresh produce markets (FPMs) was to cover the emerging gap in the market between large and small scale trade.
- With commercialisation and privatisation increasing dramatically, a growing gap between overall fresh produce production and the share of which is traded through the FPMs is concerning and there is a decrease of volumes traded at the large majority of these FPMs.
- This progressive demise is due mainly to a number of fundamental macroeconomic factors such as an improved transportation system, allowing easier market access to more direct players, as well as technological advancements critical to the fresh produce arena.
- The South African commission based system, within the context of a wholesale agent basis, continues to be the most relevant and dominating price determining mechanism.
- Opportunities have arisen in terms of small scale farmers with the introduction of critical training and market information being made available to them, and with FPMs linking these small growers with service suppliers.
- The retail industry is showing considerable increases in retail concentration, putting considerable pressure on private producers.
- The recent introduction of satellite markets has benefited the growing informal sector.
- The major threats that are concerning the FPMs at the moment are their decreasing market share and overall sustainability with increased quality and health standards, being the norm of today.

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- Potential competition in the international market hinges greatly on these factors and with the large private sector currently moving slowly away from FPMs to alternative sources of supply for various reasons, it means that the way in which FPMs operate in order to accommodate both large and small scale growers, as well as the formal and informal sector, needs to see change.

Introduction

South African fresh produce markets (FPMs) started out as meeting places between producers and consumers, where they could trade under the control of a government body or official. These places were centrally located and aimed at serving a town and its hinterland. Economic development led to the urbanisation of a large portion of the rural population. This, in turn, led to the development of central markets that replaced local markets serving a limited geographical area. A central market usually served two or more towns. In 1967, a Department of Agricultural Economics report recommended the formation of national markets to separate markets of national interest from those of local interest. Fresh produce markets include National Fresh Produce Markets (NFPM) as well as privately owned markets not controlled in terms of bylaws (NAMC, 2005; DoA, 2005).

The four largest markets of fresh produce in South Africa are Durban, Johannesburg, Cape Town and Pretoria. The four medium markets include Bloemfontein, East London, Pietermaritzburg and Port Elizabeth, and the six smaller markets are Kimberly, Klerksdorp, Springs, Uitenhage, Vereeniging and Welkom. The fourteen markets were controlled by the various local authorities, who obtained their powers to run the markets from the provinces or the state. The central meeting place was thus replaced by an economic institution that became the pivot of South Africa's distribution network of perishable products. At the moment, the large majority of FPMs in South Africa are owned and managed by the local authority. The larger FPMs however, are still wholly owned by the council, but they are private companies with top management all having been 'privatised'. All fresh produce markets in South Africa are, however, not driven by profit motives, but rather to be a service to communities (homes, farms and the industry) (NAMC, 2000; HSRC, 1991 and DoA, nd.).

The major players sharing this fresh produce retail market can be classified into three broad levels (by bulk handling) namely wholesalers, wholesaler-retailers and retailers.

The role of the fresh produce market

The role of the fresh produce market was (and still is) to provide the necessary and obvious facilities to compensate and cover the growing gap in the market that was emerging. The provision of these FPMs was to allow for equal trade opportunities for large scale, commercialised producers and smallholder farmers producing small quantities of produce. The implementation of these markets started as a government act. They are legally bound to allow anyone to engage in trade without discrimination based on size, colour or origin. The FPMs have allowed for small scale producers to find a market and sell their product easily, as levels to entry into the market would otherwise be near impossible, as large corporate buyers and marketing agents are not interested in procuring small, fluctuating quantities and/or varying quality fresh produce from these smallholders (NAMC, 2000).

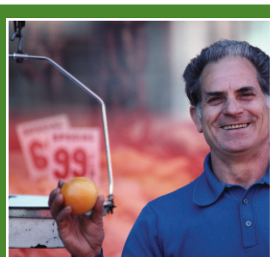
However, smallholder farmers as well as the 'previously disadvantaged' find it difficult to supply to the NFPMs because of lack of quality and sustainable volumes. The increasing size of the informal market has led to the clearer defining of a market niche for these smallholder producers who can sell their produce to the FPMs with some certainty as to who will buy their produce. Large scale commercial farmers still dominate the majority of the supply to the NFPMs with between 80 and 90 percent, while small scale producers supply the remaining variable volumes (NAMC, 2000; NAMC, 2005).

Legal framework and background

Fourteen of the nineteen fresh produce markets within the South African borders fall under the management of the respective municipalities and are governed by the laws of each. As the pressure mounts for the need for modern fresh produce marketing, it is gradually impacting on the FPMs. The necessary changes that were essential, did not take place, and it became clear that the markets did not have the incentives or effort needed, in terms of management (political bosses), to force change. Privatisation became even more crucial as it was now perceived as the only







answer to the problem. It seemed logical that a privately run market would not be hamstrung by bureaucracy and political inertia (Louw *et al*, 2005).

The dynamic, ever-changing market

The market, in terms of fresh produce, has been observed to be continuously changing and as a result, this has led to the current displacement of the large retail sector. This has impacted heavily on the procurement systems adhered to by supermarkets, forcing change in the last fifteen years and leading to the large retail sector procuring less than ten percent of fresh produce from the FPMs. Although we can observe that the majority of the FPMs in South Africa are growing, their share of the total fresh produce sector is steadily declining. Some of them have reinforced their position as providers for agro-processors including exporters and informal traders. Commercialisation and privatisation are, without doubt, on the rise (HSRC, 1991).

There is an obvious and worrying gap emerging between the FPM shares of overall production. All the FPMs throughout South Africa are decreasing in terms of volumes traded except for the Johannesburg, Pretoria and Uitenhage FPMs that are showing a positive change in overall volumes traded (See Figure 1). South Africa exports the majority of its fruit and vegetables to Europe and the rest of the world depending on the commodity.Very little is exported throughout the Southern African region. Great untapped potential lies in regional export rather than abroad. The fresh fruit industry is well known to be the best opportunity for growth in South Africa, but with the local markets being saturated, producers are continually looking beyond South Africa's borders to sell their fruit. The exchange rate plays a big role in determining export sales and profitability and a stronger rand is predicted, leading to the increase in local sales and a subsequent increase in the FPMs' share of volumes. At the moment, about 18 percent of overall fruit production is delivered to the FPMs, with the remainder going to exports and alternative local market channels. The distribution channels within South Africa are diversifying leading to ample choice of markets for farmers. In terms of vegetables, a significant 49.5 percent of total volume produced belonged to the FPMs, with their biggest competition being that of sales direct to retail (Louw *et al*, 2005; NAMC, 2005).

The incessantly changing face of the FPMs are due to many factors that are influencing consumer buying behaviour, the retail and private sector as well as the informal sector. Changing consumer perceptions and preferences in the food market as a whole have led to the imperative need for healthier and better quality foods, heavily influencing the operations and commodity quality levels of the FPMs. Recent new legislation has set new health and operational

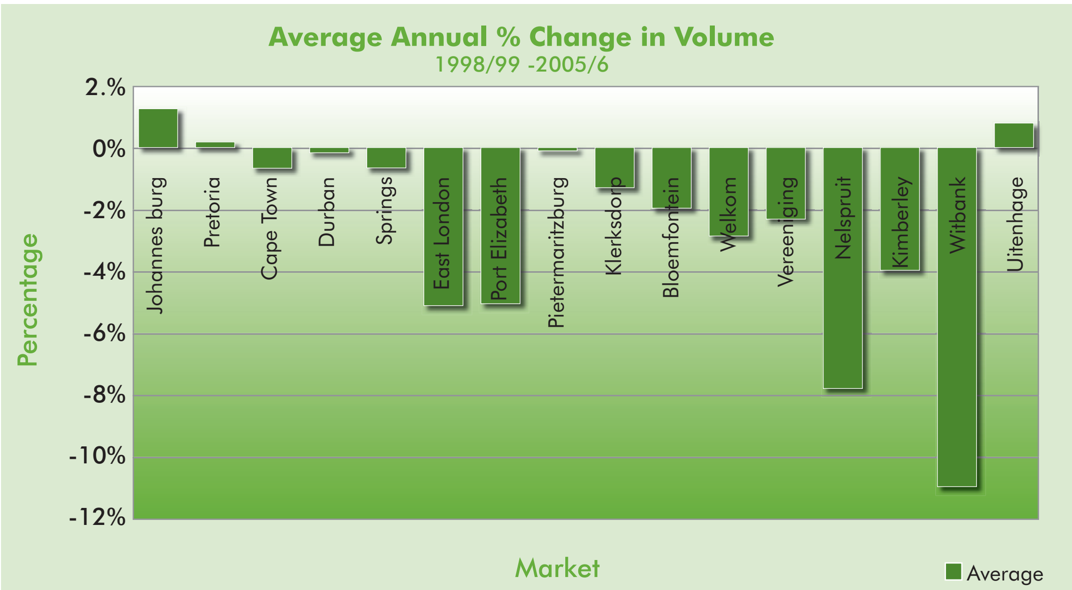


Figure 1: Average Annual change in fresh produce volumes at individual markets

Source: Adapted from Louw *et al*, 2005

standards. Increases in food safety requirements within the trading floors are being observed (Zybrands, 2001). Customer care services are also a critical issue that are presently being addressed throughout the FPMs to allow for an upgrade of service levels in order to provide customers with the best quality service experiences.

A steady and progressive demise of the FPMs has been observed within the past three to four decades. This is due to the influence of a number of macroeconomic factors. A significant improvement in the transport system, and more specifically the dismantling of the rail monopoly and the exponential growth in the road transport carrier business, has led to easier market access in terms of delivering directly to other channels of the fresh produce supply chain (retailers, wholesalers) creating easier access to these players. This was supported by the rapid advancement of South Africa's major road networks, including hundreds of kilometres of free-flow toll-roads (Madevu, 2006).

Economies of scale have been achieved in terms of the benefits arising from the use of regionalised, as opposed to localised, FPMs and have been used by producers and operators alike. Various advancements in technology have also reduced the need for localised FPMs. These include an improvement in ripening facilities and the provision of a comprehensive cold chain for produce, including transportation by refrigerated trucks (Louw *et al*, 2005).

The fresh produce market environment

The use of direct marketing is still today highly sought after by farmers and producers. Although with fresh produce, it is often difficult to market directly to the fresh produce market, wholesalers and/or retailers due to the increasingly 'sticky' quality and phytosanitary level controls being implemented as well as the problems over the geographical distribution and the various channels, which ultimately lead to the marketing of fresh produce taking slightly more indirect and complex routes. If, however, it is possible for producers to market directly to the FPMs, many significant and beneficial aspects can be taken advantage of, in particular the following: a security of payment, lower marketing costs, better bargaining positions for producers, lower prices for wholesalers and retailers, convenience, less handling and better quality (HSRC, 1991).

The NFPMs in South Africa operate on a commission only, or a combination between commission and wholesale agent, basis. The market is open not only to bulk buying, but to individual purchases as well. In the rest of the developed world the wholesale market or terminal market is by far in the majority. In some instances both systems are operated concurrently. South Africa's commission markets continue to be relevant price discovery mechanisms. In terms of the most regular customer base of these markets, it seems that mostly wholesalers, hawkers and processors seem to dominate the buying share (Louw *et al*, 2006).

Market share of fresh products

The main products sold at these markets are potatoes, onions and tomatoes with other vegetables and fruits that are making up the balance of produce being sold. Fresh fruit includes: deciduous, citrus and subtropical fruit as well as berries, cherries, strawberries, figs, prunes, quinces and melons. In terms of fresh vegetables: carrots, green peas, cabbage, beetroot, green beans, cauliflower, pumpkins, green mealies, sweet potatoes make up the bulk of the produce (NAMC, 2005).

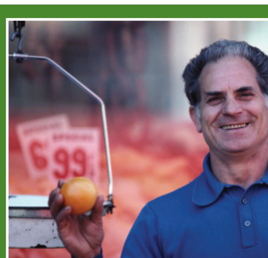
Table 1: Market share of fresh produce markets in South Africa (1999 – 2005)

Market	Market Share (%)						
	1999	2000	2001	2002	2003	2004	2005
Johannesburg	31.53	32.24	33.04	33.43	34.24	34.42	35.21
Pretoria	15.74	15.79	15.66	15.72	16.31	16.87	16.93
Cape Town	13.46	13.31	13.43	13.67	13.66	13.32	12.99
Durban	9.42	9.67	9.83	9.90	9.85	9.65	9.39
Pietermaritzburg	3.69	3.59	3.45	3.42	3.54	3.44	3.49
Bloemfontein	3.27	3.04	3.02	3.13	2.97	3.12	3.08

Source: Madevu, 2006







The smaller FPMs have been seen to be losing market share to the larger FPMs such as the Johannesburg, Pretoria and Cape Town markets. The implication is that wholesaling through FPMs is becoming increasingly consolidated and concentrated into fewer such markets.

These trends are summarised in Table 1.

The remaining percentages not marketed through FPMs represent direct sales from producers to wholesalers, category managers, retailers, processors, informal traders and consumers.

Opportunities for emerging smallholder farmers

Recent developments and changes within the FPMs have led to most of these FPMs assisting small scale farmers in training by providing them with market information, receiving and selling their fresh produce and linking them with service suppliers. There are substantial barriers concerning the direct trade of these small scale farmers with supermarkets, ie. this market channel is extremely demanding and they prefer to rely on their developed supplier schemes as their main supply channels. Thus, NFPMs have allowed for the provision of alternative inclusion of small scale farmers into the modern day markets. This bodes well for these small producers of fresh produce, and can allow for the further development in terms of standards protocol, production and possible export opportunities.

The importance of enabling emerging, and/or previously disadvantaged farmers within the FPMs is one of the main objectives for the establishment of FPMs. These poor, small scale farmers have been able to benefit from the provision of one of the bylaws of these FPMs which states that it is imperative for the FPMs to allow equitable access of all producers of fresh produce to trade at the market. This transformation not only assists smallholder growers in providing a competitive market in which they can sell their product, but helps to develop these new farmers and ultimately lead to success and growth. The large FPMs boast of diversity in terms of the various buyers that include chain retailers, exporters, processors, informal traders, wholesalers. It is therefore important that farmers supply the best quality produce in appropriate packaging and sizes.

Transportation is often considered one of, if not the most important issue that is affecting emerging farmers. This is due to the fact that sometimes their produce has to travel substantially long distances and if the produce does not arrive within the allocated trading hours of the markets and/or is damaged, it cannot be sold on the market with the current quality constraints in place.

Relationships in the fresh produce market supply chain

Statistics and market observers concur that municipal FPMs are by far the dominant player and form of wholesaling in the South African FFV sector (DoA. nd.; DoA 2005, City of Johannesburg, 2006 and AgriTV, 2006). They supply fresh produce to chain retailers, processing plants, wholesalers, wholesaler-retailers, local stores, the informal sector as well as directly to the final consumer. It is imperative to examine the various supply chain relationships that exist between the various players, how they interact with the FPMs and the strength of these market linkages.

Figure 2 on the next page clearly illustrates the simplistic relationships of the various customers of the FPMs. As illustrated in the figure, there is no evidence of any strongly related buyers from the FPMs. However, a number of medium relationships do exist between the FPMs and hawkers, street vendors and greengrocers. Hawkers generally prefer to obtain produce from the FPMs than from the actual growers as the markets are generally located closer to the locations where they plan on selling their purchases and thus infer a much greater convenience factor and increased profits due to the lowering of transportation costs. The same benefits can be seen in terms of street vendors. Greengrocers, who are generally limited to procuring fresh produce either directly from the farms or alternatively from the markets, will prefer to procure from the one that is closer, of better quality standards, and with whom they share a



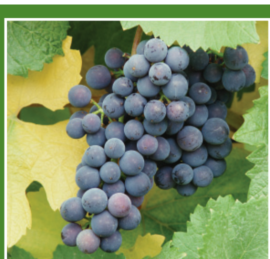
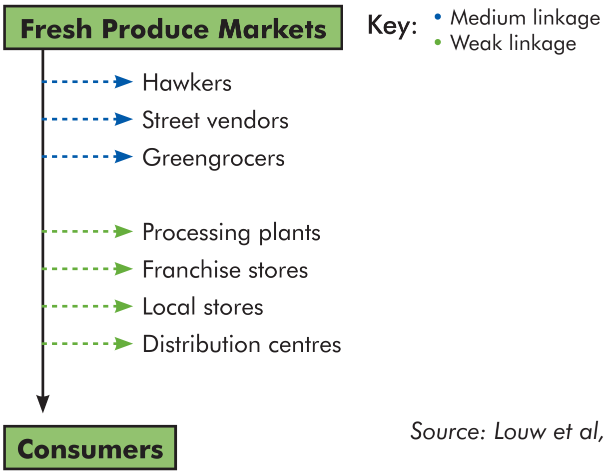


Figure 2:
Overview of the main procurement agents of the FPMs in South Africa and their respective relationships.



Source: Louw et al, 2007

better relationship. The FPMs have third degree relations with processing plants, franchise stores, local stores and distribution centres. Processing plants acquire their product from the FPMs as well as from small and large scale farmers. Quality issues are generally not factored into the reasons for preferred choice of where they procure as the produce is transformed into many processed products and so in the main, the influential factor that will affect them is price competitiveness (Dodds, 2006; Madevu, 2006; NAMC, 2005).

Small scale farmers

Rapid changes are taking place in agri-food markets in developing countries. The spread of dynamic modern retailers, wholesalers and food processing businesses is reshaping the way that food systems are governed. The restructuring brought about by these changes include the evolution of procurement systems. Small scale agriculture, which supports the livelihoods of the majority of rural poor, is poorly prepared for these changes. Rural-based hawkers can be seen to hold the main channel of distribution for these small scale growers. Processing plants, local stores and local community markets comprise the second group to which small scale growers send their produce. And finally, the N2 markets, FPMs and distribution centres make up the final, weaker channels where small growers can distribute their product.

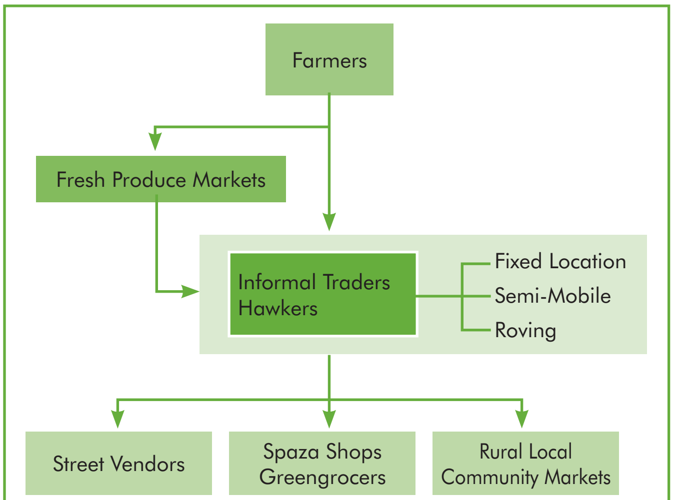
Formal retailers – the private sector

In South Africa, retail concentration is constantly increasing as retailers are the most significant players between the producer and the consumer. Concentration at this level could put producers under considerable pressure. One view is that as retailers move towards category management (the use of only one or two suppliers per category of product on their shelves) the NFPMs will play a smaller and smaller role in the retailer's sourcing strategy, to the detriment of all small producers, both established and emerging. There are a variety of distribution centres that receive fresh produce from both large scale farmers and the FPMs. They in turn supply this produce to their corporate supermarkets, as well as to franchise and independent supermarkets.

Informal sector

According to Morris (1992), informal trade plays a significant role in South Africa, largely due to a history of township living. Shebeens, spaza shops and street hawkers generate large volumes of product sales on a national scale.

Figure 3: The supply relationship of fresh produce in terms of informal trade



Source: Madevu, 2006

One of the specialities of the FPM is the involvement of a large informal sector whereby informal sect entrepreneurs can receive training on how to use the market through an 'on the market floor' facility. With hawkers buying directly from the FPMs, they bypass the otherwise 'standard' links

in the supply chain such as chain or wholesaler retailers, and sell directly to the end customer. These various informal retail arrangements come in three main forms as shown in Figure 3 above. Firstly those classified as fixed-location hawkers, are generally involved in certain partnerships and family alliances and are permanently located at roadside stands and transport nodes such as bus, taxi and train stations. The second class of informal retailers comprise those who are semi-mobile and are involved in partnerships and family alliances with a fixed or movable base, including those doing business at traffic robots and aboard commuter trains. Finally, there are roving hawkers. This informal group again involves partnerships and family alliances using movable displays including trolleys, baskets, boxes, bags and hangings.

Satellite markets

These markets bring the produce closer to the customer and provide convenience and better customer satisfaction. By developing smaller markets in the key surrounding areas to the NFPMs, the informal trader will better their survival options as significant transportations costs dig into their profits and impact negatively on the sustainability of their business.

Conclusion and recommendations

Recent economic developments within the past decades have led to the urbanisation of a large portion of the rural population. This resulted in the development of central markets that have gradually replaced local markets that only served a limited geographical area. FPMs include National FPMs as well as privately owned markets that are not controlled by the various municipal bylaws.

The larger FPMs support a management structure where top management is privatised in order to allow for incentive-driven and greater efficiency in an endeavour to expand profit margins. The role of the FPMs has been to cover the gap emerging in the market between large scale, commercialised growers and the small scale or emerging farmers. The equal trade opportunities that the FPMs stipulate have been extremely beneficial to the smaller growers of fresh produce. It has given them the chance of ease of entry into the market. However, the quality and food safety standards implemented by the NFPMs has made the market slightly more demanding and sticky for these developing farmers who now have to battle with quality control and the fact that many of them are limited by human, financial and natural resources. There is a need for the implementation of systems to aid the growth and development of these emerging farmers and the introduction of training programmes that enlighten new farmers on market systems and various controls that must be adhered to. The growth of the informal sector, and especially the development of the various satellite markets, has given them leading customer share of the FPMs. There has also been a significantly large displacement of the FPMs by the retail sector, and the FPMs are slowly but surely losing overall market share of fresh product due to increased commercialisation and privatisation. Advancements in the transport systems as well as various technological improvements have also led to the reduction in the need for localised FPMs. This thus re-emphasizes the need for further development of satellite markets that will boost the FPMs' market share and distribution networks, bringing good quality products closer to the consumer at greater cost-competitive pricing. The most influential factors that will determine the supply and quality thereof are diseases, pests, weather fluctuations and the perishability of fresh produce.

Many of the NFPMs are increasing the opportunities available to new, emerging and small scale farmers through development aimed at future success and growth by:

- curbing crucial transportation problems
- training farmers in necessary markets skills
- providing understanding of operational and pricing mechanisms.

The FPMs need to continue their support of small scale farmers, both directly and indirectly, and continue to both uphold, and maintain, the current quality standards in place. This will expand their market share and ultimately lead to further potential in terms of exportation of produce and greater customer service and satisfaction. Without these controls in place, the FPMs will continue to loose market share and influence in South African markets as well as those abroad.

Wholesalers and travelling traders are vital in linking smallholders to markets, but they suffer from counterproductive public legislation (for example legislation

to organise wholesale markets can have unintended consequences) and a lack of donor support. Wholesale markets provide convenient services that others often cannot provide and are able to respond at different levels of retail restructuring. Wholesale markets can and have been, a buffer that filters retail modernisation, alleviating impacts at farm level. The diversification of wholesale tasks in response to new downstream requirements often expresses itself as a new set of demands and benefits at farm level. Traceability requirements, consumer pressures and proper retail branding induce retailers to invest in the supply chain. Mostly this is limited to midstream (although processors invest at farm level) but there are some exciting examples of direct retail investment at farm level. Most attention goes to either upstream or downstream. The focus need to be changed to midstream as this is key to inclusion of smallholders in dynamic markets,

When processors procure directly from farmers they tend to have direct impact through demands of quality (more than wholesale) and through direct investments in pre/post harvest part of the supply chain. Processors as intermediaries are having more direct impacts on farm-level restructuring. Retail rarely buys directly from farm. There are some exciting innovations of 'doubly-specialised intermediaries' that provide both market demand and farmer support. These are often initiated by NGOs and donors but also sometimes by the private sector. Private sector engagement in pro-poor procurement practice is beginning to be realised. Such specialised agents provide brand marketing, production support and procurement flexibility and add value enabling participation at a higher level for small scale farmers. Specialised agents that provide brand marketing, production support and procurement flexibility will add value enabling participation at a higher level for small scale farmers.

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