Regoverning Markets | Policy Brief 4

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The role of Fresh Produce Markets in South Africa

REGOVERNING MARKETS

Context

This policy brief forms part of the Regoverning Markets study in Southern Africa. It sought to analyse market concentration in the food processing and retail sectors, as well as to predict future dynamics in the sector. This concentration was the result of the restructuring of food markets and the rapid changes taking place in the structure and governance of local, national, and regional agri-food markets. The consequential implications of the restructuring of the food industry will be evaluated as impacting on small/medium producers of policies and programs within the context of the agri-food market.

Key points

- Initially the role of fresh produce markets (FPMs) was to fill 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 macro-economic 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 and thus putting considerable pressure on FPMs.
- 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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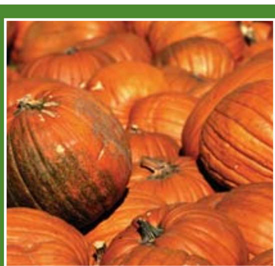


- Potential competition in the international market hinges greatly on these factors and with the large private sector currently moving slowly away from FPMs to alternative sources of supply for various reasons, it means that the way in which FPMs operate in order to accommodate both large and small scale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

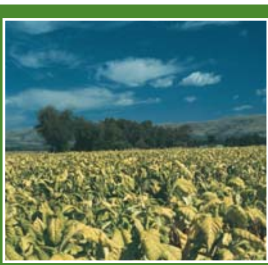
The four largest markets of fresh produce in South Africa are Durban, Johannesburg, Cape Town and Pretoria. The four medium markets include Bloemfontein, East London, Pietermaritzburg and Port Elizabeth, and the six smaller markets are Kimberly, Klerksdorp, Springs, Uitenhage, Vereeniging and Welkom. The fourteen markets were controlled by the various local authorities, who obtained their powers to run the markets from the provincial or the central government. 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 local authorities whom seem to lack a clear vision in terms of taking this business forward. While the larger FPMs are still wholly owned by the council, the smaller FPMs have private companies in top management and they have all been 'privatised' to some extent. 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, Not Dated).

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 for 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 the barriers 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. There is a need for cooperatives such as *Farmwise* and *TRU Cape* to assist farmers in terms of enabling effective participation of smallholders in the fresh produce market systems. 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 South Africa's 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 enforce 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; HSRC, 1990).

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 wholesale functions by a 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's share 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 lines to Africa, however there is more trade to Europe, especially with regard to sub-tropical fruits. Very little is exported throughout the SADC region although 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. In 2005, about 18 percent of overall fruit production was 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 market options 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).

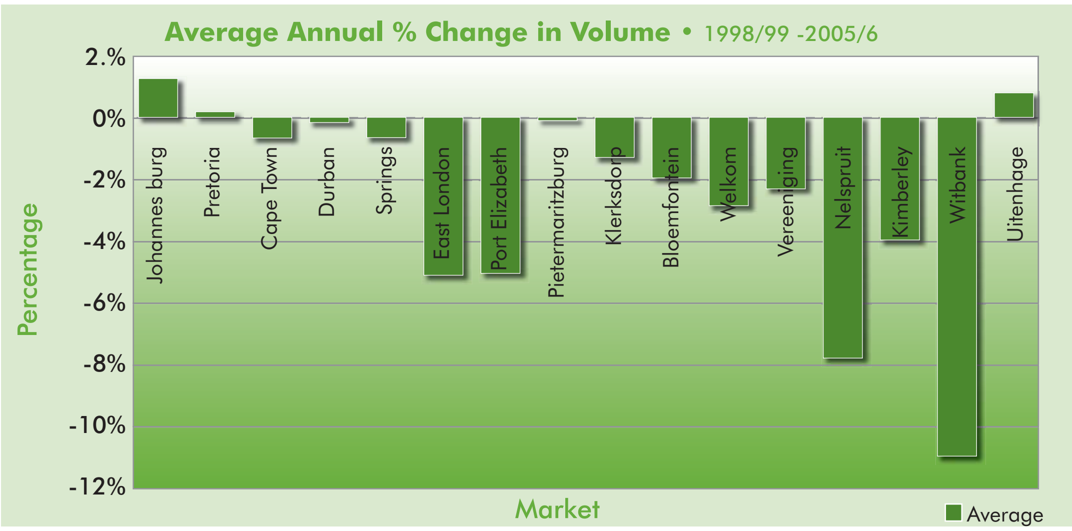


Figure 1: Average Annual change in fresh produce volumes at individual markets

Source: Adapted from Louw *et al*, 2005

The incessantly changing face of the FPMs is due to many factors that are influencing consumer buying behaviour and the retail's procurement strategies. 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. New legislation has been implemented that has set new health and operational standards to be adhered to in the market's procurement strategies. The increases in food safety requirements within the trading floors are being observed as well as better customer service (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 macro-economic 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. However, the marketing of fresh produce takes a slightly more indirect and complex route due to the increasingly 'sticky' quality demands and implementation of phytosanitary controls as well as problems over the geographical distribution and the various channels. This often makes it difficult to market directly to the fresh produce markets, wholesalers and/or retailers. 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 market floor is only payable on a commission basis by producers - five percent for the market management, five to seven percent for the market agents. Large markets have facilities for wholesalers but are compelled to do procurement from the floor. 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).

The smaller FPMs have been seen to be losing market share to the larger FPMs such as the Johannesburg, Tshwane 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.

Table 1: Market share of fresh produce markets in South Africa (1999 – 2008)

Market	Market Share (%)									
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008*
Johannesburg	31.53	32.24	33.04	33.43	34.24	34.42	35.21	38.64	39.73	38.84
Pretoria	15.74	15.79	15.66	15.72	16.31	16.87	16.93	20.01	20.52	21.37
Cape Town	13.46	13.31	13.43	13.67	13.66	13.32	12.99	14.64	13.22	13.31
Durban	9.42	9.67	9.83	9.90	9.85	9.65	9.39	11.25	12.05	11.55
Pietermaritzburg	3.69	3.59	3.45	3.42	3.54	3.44	3.49	4.30	4.08	4.07
Bloemfontein	3.27	3.04	3.02	3.13	2.97	3.12	3.08	3.78	3.64	3.70
East London	3.34	3.06	2.97	2.84	2.88	2.91	2.97	3.69	3.56	3.54
Port Elizabeth	3.17	3.09	3.07	2.94	2.81	2.89	2.73	3.70	3.20	3.61

**The 2008 figures are estimates* *Source: Madevu, 2006 • Updated by Authors, 2008*

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 namely, this market channel is extremely demanding and they prefer to rely on their developed supplier network as their main supply channels. Thus, national FPMs have allowed for the provision of alternative channels of inclusion for 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.

One of the main objectives for the establishment of FPMs is to enable emerging, and/or previously disadvantaged farmers to utilise the 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 to 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 produce, but helps to develop these new farmers and ultimately lead to their success and growth. The large FPMs boast diversity in terms of the various buyers that include chain retailers, exporters, processors, informal traders and 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 is not fresh and/or is damaged on arrival it will still be sold but not at the best prices.

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. Not dated; DoA 2005, City of Johannesburg, 2006 and AgriTV, 2006). They supply fresh produce to chain retailers, processing plants, wholesalers, wholesaler-retailers, local stores, and 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 il-



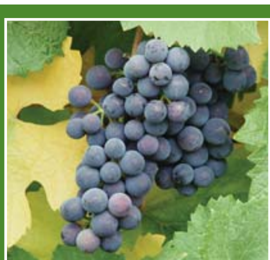
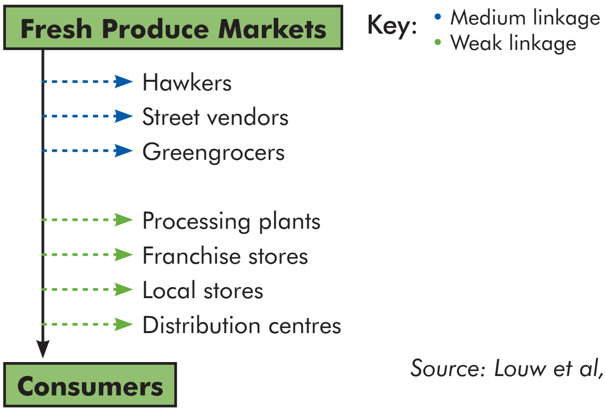


Figure 2: Overview of the main procurement agents of the FPMs in South Africa and their respective relationships.



Source: Louw et al, 2007

lustrated in the figure, there is no evidence of any strongly FPM related buyers. 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 to sell 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, whom are generally limited to procuring fresh produce either directly from the farms or alternatively from the markets, prefer to procure from the one that is closer, of better quality standards, and with whom they share a 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 communities' markets comprise the second group to which small scale growers send their produce. And finally, the satellite N2 markets, FPMs and distribution centres make up the final, weaker channels where small growers can distribute their product.

Formal retailers – the private sector

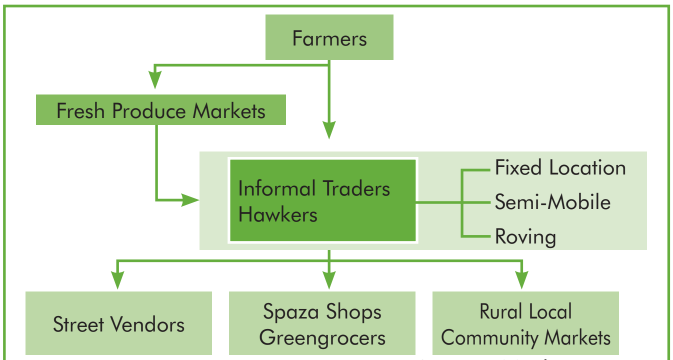
In South Africa, retail concentration is constantly increasing as retailers are the most significant players between the producer and the consumer. Concentration at this level could put producers under considerable pressure. One view is that as retailers move towards category management (the use of only one or two suppliers per category of product on their shelves) the national fresh produce markets (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 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.

One of the specialities of the FPMs is the involvement of a large informal sector whereby informal sector 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. Firstly those classified as fixed-location hawkers, are generally involved in certain partnerships and family alliances and are permanently located at roadside stands and

Figure 3: The Supply relationship of Fresh Produce in terms of Informal Trade



Source: Madevu, 2006

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

Satellite markets bring the produce closer to the customer and provide convenience and better customer satisfaction. The aim was to bring the produce closer to the smaller businesses and informal traders thereby reducing transport costs to them. By developing these smaller markets in key surrounding areas to the NFPMs, it will allow the average informal trader to better their profit margins as transportation costs will have decreased significantly. The significant transportation costs dig into traders' profits and impact negatively on the sustainability of their businesses

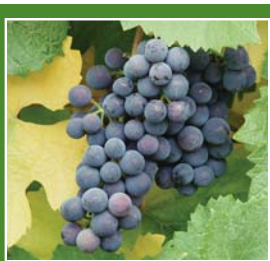
Conclusion and recommendations

Economic developments within the past two 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 beneficial to the smaller growers of fresh produce. It has given them the chance of easy entry into the market. However, the quality and food safety standards implemented by the NFPMs has made the market slightly more demanding and sticky towards these developing farmers who now have to battle with quality control as well as 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 a larger share of FPMs' customer base. 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 produce 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. The development of satellite markets can boost FPMs' market share and distribution networks, bringing good quality products closer to the consumer at greater cost-competitive pricing. However the fresh produce markets should improve the services they render to their clients which includes credit, longer opening hours, delivery, etc.

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 the crucial problems involved with transportation, equipping these farmers with the necessary market skills and helping them understand both operational and pricing mechanisms involved in the market. The FPMs need to continue their support of small scale farmers in various direct and indirect ways and continue to uphold and maintain the current quality level standards set that will expand their market share and ultimately lead to further potential in terms of





exportation of the produce and greater customer service and satisfaction. Without these controls in place, the FPMs will only continue to lose their market share and influence in the markets of South Africa and 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 a key factor for the 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 parts of a supply chain. Processors as intermediaries are having more direct impacts on farm-level restructuring. Retailers rarely buy directly from farmers. 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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