

Horticulture Industry Overview

August 2025

1. Executive summary

Despite the implementation of the Horticulture Market Share Promotion Scheme (MSP) in 2005, Namibia's horticultural sector remains highly import-dependent. Over the past decade, domestic production has consistently met only 30–40% of national demand, with imports accounting for the remaining 60–70%. While the MSP has been instrumental in incentivizing local production by guaranteeing farmers full market access whenever domestic supply thresholds are met, the scheme has not been sufficient to significantly reduce reliance on imports.

Several factors continue to constrain Namibia's horticultural production capacity. These include high input costs, water scarcity, limited irrigation infrastructure, and the vulnerability of production to climate variability. Additionally, smallholder farmers face challenges related to access to finance, technology, and extension services, which limits their ability to scale up and compete with imported produce. On the demand side, consumer preferences for year-round supply and a wide variety of products, many of which cannot be grown locally at scale, further reinforce the dependency on imports.

2. Analysis

Namibia recorded a total consumption of 93,210 tons of horticulture fresh produce worth N\$ 1 billion during the 2024/2025 marketing year. This indicates a 13% increase from 82,772 tons of fresh produce consumed during the 2023/2024 period. The country imported 61,804 tons of horticultural products valued at N\$ 681 million. Local demand totaled 93,210 tons, of which only 34% was accounted through domestic production and the remaining 66% was imported (Figure 1).

Potatoes were the dominant crop in both domestic production and imports, with local output of 8,534 tons (N\$ 91.5 million) and imports of 22,751 tons (N\$ 169.7 million). Other principal crops included onions 5,471 tons (N\$ 48.0 million) and imports of 2,136 tons (N\$16.4 million), butternuts 2,605 tons (N\$ 17.2 million), carrots 2,568 tons (N\$ 26.3 million) and imports of 1,872 tons (N\$ 15.8 million), tomatoes 2,297 tons (N\$ 31.0 million) and imports of 1,083 tons (N\$ 14.1 million), cabbage 2,242 tons (N\$ 20.2 million), watermelons 1,247 tons (N\$ 11.5 million), beetroot 1,061 tons (N\$ 8.4 million), pumpkins 832 tons (N\$ 8.6 million), and English cucumbers 552 tons (N\$ 16.5 million), while high-value produce such as lettuce 257 tons (N\$15.7 million) and mushrooms 172 tons (N\$13.3 million) further reinforce the persistent supply gaps, despite local production.

Fruit imports remain high, with 93% of consumption sourced externally. Imports included apples 13,566 tons (N\$102.9 million), bananas 7,019 tons (N\$ 89.5 million), and oranges 2,398 tons (N\$ 25.4 million), pears 1075 tons (N\$12.1 million), while grapes 530 tons (N\$ 20.8 million) and avocados 682 tons (N\$ 18.9 million). Citrus fruits, including naartjies 1,476 tons (N\$ 14.6 million) and lemons 775 tons (N\$ 9.1 million), further add to import dependency (Figure 2).

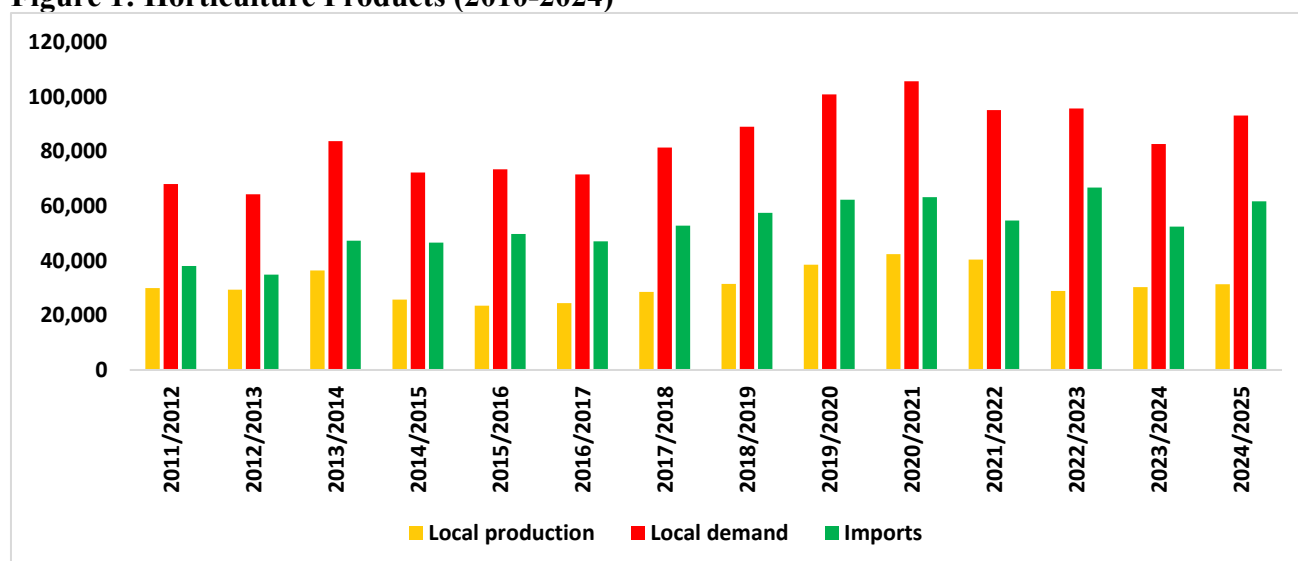
In terms of exports, grapes dominated followed by tomatoes, onions, butternuts, and dates. During the period under review, the country exported 58,410 tons of grapes, generating over N\$ 1.5 billion in revenue, followed by tomatoes with 14,439 tons valued at N\$ 134 million, and dates with 2,828 tons valued at N\$ 109 million. Overall, the Namibian horticulture sector exported 91,528 tons of produce generating a total revenue of N\$ 2.05 billion (Figure 3).

In accordance with the Agronomic Industry Act (Act 20 of 1992) and MSP framework, the Namibian Agronomic Board implemented import restrictions during the special permit period (01–31 August 2025). These included:

- **Closed Borders:** Butternut, cabbage, onions, sweet potatoes, cocktail tomatoes, and round tomatoes.
- **Pro-Rata Imports:** Carrots (50%), English cucumbers (50%), coloured peppers (30%), green peppers (30%), jam tomatoes (20%), and iceberg lettuce (30%).
- **Open Borders (MSP Applies):** Beetroot, gem squash, washed potatoes, pumpkins, watermelons, sweet melons, and sweetcorn, subject to the 47% MSP sourcing rule.

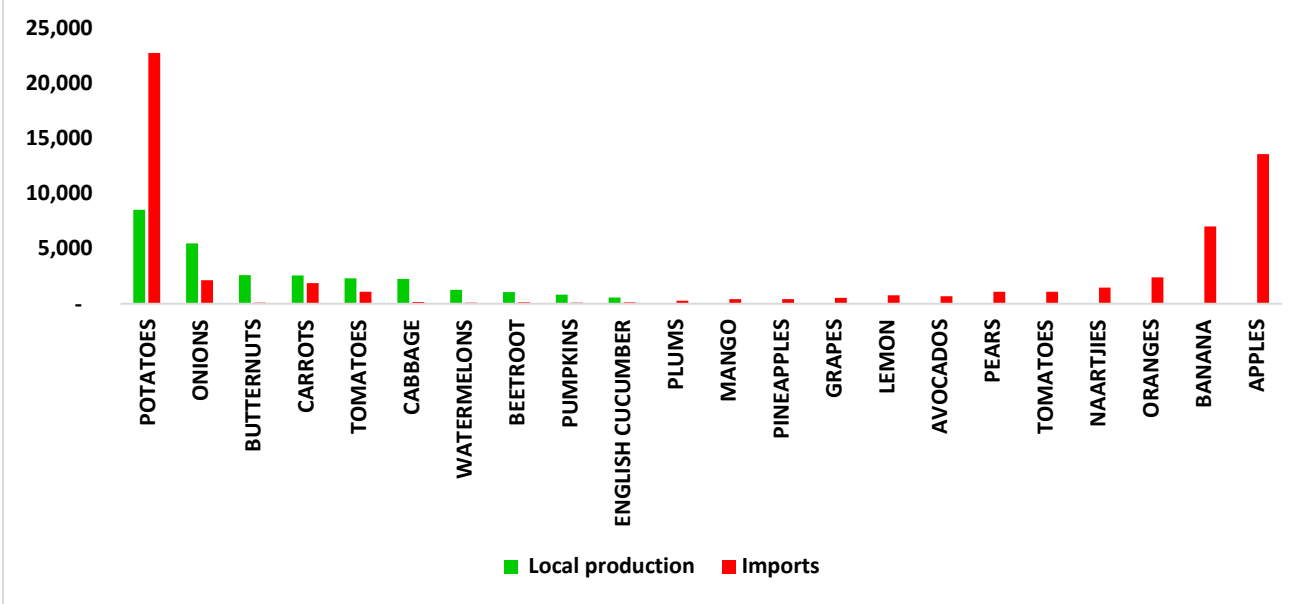
PRODUCT	CLOSED	OPEN	PRO-RATA
Beetroot			
Butternut			
Cabbage			
Carrot			
English Cucumber			
Colored Pepper			
Green pepper			
Gem Squash			
Onion			
Potato Washed			
Pumpkin			
Sweet Potato			
Jam tomato			
Cocktail tomato			
Round tomato			
Watermelon			
Sweet Melon			
Sweetcorn			
Lettuce (iceberg)			

Figure 1: Horticulture Products (2010-2024)



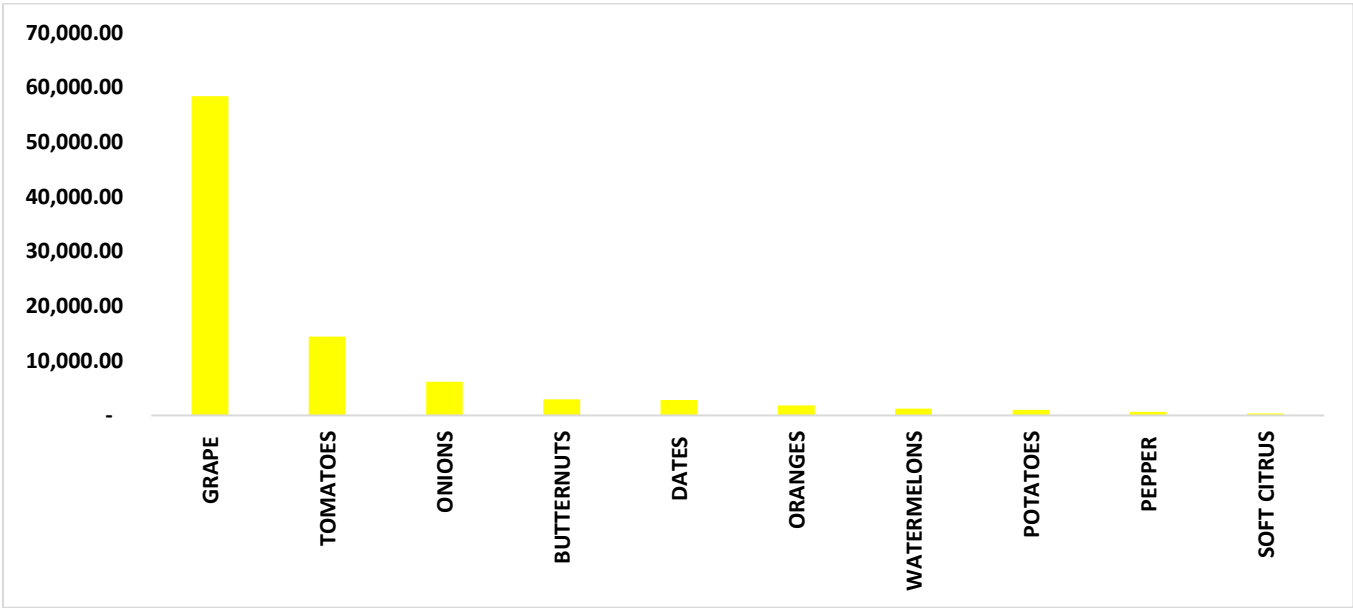
Source: Namibia Agronomic Board & HEI Research

Figure 2: Horticulture Local Purchases and Import Tonnage 2024/2025



Source: Namibia Agronomic Board & HEI Research

Figure 3: Horticulture: Export Tonnage 2024/2025



Source: Namibia Agronomic Board & HEI Research

3. Outlook and Recommendations

We expect Namibia's horticultural sector to maintain a modest domestic production growth trajectory alongside continued reliance on imports. Policy instruments such as the Market Share Promotion (MSP) scheme and targeted import restrictions will remain central in incentivising local production, particularly for high-demand crops such as potatoes, onions, and carrots.

However, significant challenges persist, especially for small-scale producers. Limited access to finance, quality inputs, and reliable logistics often constrain their ability to consistently meet market standards. These barriers are a key reason why formal traders remain reluctant to establish production or supply contracts with small-scale horticultural farmers. Addressing these issues, including improving quality assurance and strengthening supply chain linkages, could form part of a broader strategy to integrate small-scale producers into formal markets, ultimately fostering a more inclusive and resilient horticultural sector.

The medium-term performance of the sector will hinge on the ability to increase local output while gradually reducing import dependence. This requires targeted investments in irrigation systems, storage facilities, and farm-level capacity building, complemented by consistent policy enforcement. If effectively implemented and aligned with broader trade and agricultural development strategies, the MSP has the potential to enhance Namibia's horticultural self-sufficiency, ease pressure on foreign exchange reserves, and create more stable income streams for farmers.