

## **Dairy Products and Alternatives in South Africa**

Market Direction | 2022-09-21 | 76 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

### **Report description:**

The demand for dairy in 2022 is experiencing a downward trend as consumers try to reduce overall spending on food, including dairy products. The war in Ukraine is causing major uncertainty worldwide and increasing prices of commodities, which are reaching an all-time high. This follows the pandemic and economic recession in South Africa. Local consumers have always been price sensitive; however, within the context of the review period, they are now more cash-strapped than ever. There are numerou...

Euromonitor International's Dairy Products and Alternatives in South Africa report offers in-depth knowledge of the market at a national level, providing local insight and understanding unavailable elsewhere. In addition to the latest retail sales data 2017-2021, it identifies the leading companies, brands and retail outlets, and assesses the key trends and demographic shifts behind consumer demand and sales growth. How key trends such as health and wellness, sustainability and recovery from the pandemic are shaping the market in <|Year|> directly informs our forecasts to 2026, clearly indicating how the market is expected to change.

Product coverage: Baby Food, Dairy, Plant-based Dairy.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Dairy Products and Alternatives market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

## **Table of Contents:**

Dairy Products and Alternatives in South Africa  
Euromonitor International  
September 2022

List Of Contents And Tables

### **DAIRY PRODUCTS AND ALTERNATIVES IN SOUTH AFRICA**

#### **EXECUTIVE SUMMARY**

Dairy products and alternatives in 2022: The big picture

Key trends in 2022

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

CHART 1 Dairy Products and Alternatives Value Sales Growth Scenarios: 2020-2027

CHART 2 Dairy Products and Alternatives Impact of Drivers on Value Sales: 2020-2027

#### **MARKET DATA**

Table 1 Sales of Dairy Products and Alternatives by Category: Value 2017-2022

Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2017-2022

Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2018-2022

Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2019-2022

Table 5 Penetration of Private Label by Category: % Value 2017-2022

Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2017-2022

Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2022-2027

Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2022-2027

#### **DISCLAIMER**

#### **SOURCES**

Summary 1 Research Sources

### **BABY FOOD IN SOUTH AFRICA**

#### **KEY DATA FINDINGS**

#### **2022 DEVELOPMENTS**

Innovation boosts baby food's performance despite constrained household budgets

Milk formula retains largest share despite restrictions on advertising

Specialist baby stores expand presence as South African population continues to grow

#### **PROSPECTS AND OPPORTUNITIES**

Infant health expected to remain top priority regardless of income

Affordability remains focus for cash-strapped consumers

Increasing demand for snacking expected to drive growth of other baby food

#### **CATEGORY DATA**

Table 9 Sales of Baby Food by Category: Volume 2017-2022

Table 10 Sales of Baby Food by Category: Value 2017-2022

Table 11 Sales of Baby Food by Category: % Volume Growth 2017-2022

Table 12 Sales of Baby Food by Category: % Value Growth 2017-2022

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 13 Sales of Growing-Up Milk Formula by Age: % Value 2017-2022

Table 14 NBO Company Shares of Baby Food: % Value 2018-2022

Table 15 LBN Brand Shares of Baby Food: % Value 2019-2022

Table 16 Distribution of Baby Food by Format: % Value 2017-2022

Table 17 Forecast Sales of Baby Food by Category: Volume 2022-2027

Table 18 □Forecast Sales of Baby Food by Category: Value 2022-2027

Table 19 □Forecast Sales of Baby Food by Category: % Volume Growth 2022-2027

Table 20 □Forecast Sales of Baby Food by Category: % Value Growth 2022-2027

## BUTTER AND SPREADS IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Consumption down as unit prices soar

Sigalo Foods retains leadership due to continuous promotions

Out-of-home consumption drives foodservice volume

#### PROSPECTS AND OPPORTUNITIES

Potential opportunities through affordable innovation

Lunch remains important eating occasion for margarine

Supermarkets expected to remain dominant distribution channel

#### CATEGORY DATA

Table 21 Sales of Butter and Spreads by Category: Volume 2017-2022

Table 22 Sales of Butter and Spreads by Category: Value 2017-2022

Table 23 Sales of Butter and Spreads by Category: % Volume Growth 2017-2022

Table 24 Sales of Butter and Spreads by Category: % Value Growth 2017-2022

Table 25 NBO Company Shares of Butter and Spreads: % Value 2018-2022

Table 26 LBN Brand Shares of Butter and Spreads: % Value 2019-2022

Table 27 Distribution of Butter and Spreads by Format: % Value 2017-2022

Table 28 Forecast Sales of Butter and Spreads by Category: Volume 2022-2027

Table 29 Forecast Sales of Butter and Spreads by Category: Value 2022-2027

Table 30 □Forecast Sales of Butter and Spreads by Category: % Volume Growth 2022-2027

Table 31 □Forecast Sales of Butter and Spreads by Category: % Value Growth 2022-2027

## CHEESE IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

High unit prices lead to declining retail volume sales in 2022

Lactalis retains leadership despite tough competition from private label

Checkers and Pick 'n Pay go premium with Forage and Feast, and Crafted Collection, respectively

#### PROSPECTS AND OPPORTUNITIES

Moderate growth expected over forecast period, driven by processed and hard cheese

Lunch remains important eating occasion for processed cheese

Out-of-home consumption to boost foodservice volumes

#### CATEGORY DATA

Table 32 Sales of Cheese by Category: Volume 2017-2022

Table 33 Sales of Cheese by Category: Value 2017-2022

Table 34 Sales of Cheese by Category: % Volume Growth 2017-2022

Table 35 Sales of Cheese by Category: % Value Growth 2017-2022

Table 36 Sales of Spreadable Processed Cheese by Type: % Value 2017-2022

Table 37 Sales of Soft Cheese by Type: % Value 2017-2022

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 38 Sales of Hard Cheese by Type: % Value 2017-2022

Table 39 NBO Company Shares of Cheese: % Value 2018-2022

Table 40 LBN Brand Shares of Cheese: % Value 2019-2022

Table 41 □Distribution of Cheese by Format: % Value 2017-2022

Table 42 □Forecast Sales of Cheese by Category: Volume 2022-2027

Table 43 □Forecast Sales of Cheese by Category: Value 2022-2027

Table 44 □Forecast Sales of Cheese by Category: % Volume Growth 2022-2027

Table 45 □Forecast Sales of Cheese by Category: % Value Growth 2022-2027

## DRINKING MILK PRODUCTS IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Rising unit prices lead to falling retail volume sales of drinking milk products

Private label retains strength due to its value proposition

Cheap imports of milk continue to threaten local production capacity□

#### PROSPECTS AND OPPORTUNITIES

Positive but undynamic retail volume growth for drinking milk products over forecast period

Private label expected to retain strength due to lingering price sensitivity

Flavoured milk drinks expected to record moderate retail volume growth

#### CATEGORY DATA

Table 46 Sales of Drinking Milk Products by Category: Volume 2017-2022

Table 47 Sales of Drinking Milk Products by Category: Value 2017-2022

Table 48 Sales of Drinking Milk Products by Category: % Volume Growth 2017-2022

Table 49 Sales of Drinking Milk Products by Category: % Value Growth 2017-2022

Table 50 NBO Company Shares of Drinking Milk Products: % Value 2018-2022

Table 51 LBN Brand Shares of Drinking Milk Products: % Value 2019-2022

Table 52 Distribution of Drinking Milk Products by Format: % Value 2017-2022

Table 53 Forecast Sales of Drinking Milk Products Products by Category: Volume 2022-2027

Table 54 Forecast Sales of Drinking Milk Products Products by Category: Value 2022-2027

Table 55 □Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2022-2027

Table 56 □Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2022-2027

## YOGHURT AND SOUR MILK PRODUCTS IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Craving indulgence boosts demand for double cream yoghurt

Danone remains leading player despite fierce competition from private label

Supermarkets continues to dominate distribution of yoghurt and sour milk products

#### PROSPECTS AND OPPORTUNITIES

Affordability expected to remain a priority over forecast period

Maas remains an important protein source for many South Africans

Childhood nutrition expected to remain area of focus for manufacturers

#### CATEGORY DATA

Table 57 Sales of Yoghurt and Sour Milk Products by Category: Volume 2017-2022

Table 58 Sales of Yoghurt and Sour Milk Products by Category: Value 2017-2022

Table 59 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2017-2022

Table 60 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2017-2022

Table 61 Sales of Flavoured Yoghurt by Flavour: Rankings 2017-2022

Table 62 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2018-2022

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 63 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2019-2022

Table 64 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2017-2022

Table 65 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2022-2027

Table 66 □Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2022-2027

Table 67 □Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2022-2027

Table 68 □Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2022-2027

#### OTHER DAIRY IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Retail volume declines for other dairy driven by high unit prices

Leading players maintain strength despite increasing competition from private label

##### PROSPECTS AND OPPORTUNITIES

Affordability expected to remain a priority over forecast period

Further home cooking and baking expected to sustain retail demand for other dairy

Health and wellness concerns expected to drive category innovation

##### CATEGORY DATA

Table 69 Sales of Other Dairy by Category: Volume 2017-2022

Table 70 Sales of Other Dairy by Category: Value 2017-2022

Table 71 Sales of Other Dairy by Category: % Volume Growth 2017-2022

Table 72 Sales of Other Dairy by Category: % Value Growth 2017-2022

Table 73 Sales of Cream by Type: % Value 2017-2022

Table 74 NBO Company Shares of Other Dairy: % Value 2018-2022

Table 75 LBN Brand Shares of Other Dairy: % Value 2019-2022

Table 76 Distribution of Other Dairy by Format: % Value 2017-2022

Table 77 Forecast Sales of Other Dairy by Category: Volume 2022-2027

Table 78 □Forecast Sales of Other Dairy by Category: Value 2022-2027

Table 79 □Forecast Sales of Other Dairy by Category: % Volume Growth 2022-2027

Table 80 □Forecast Sales of Other Dairy by Category: % Value Growth 2022-2027

#### PLANT-BASED DAIRY IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Private label's growth in plant-based milk ahead of brands

Tiger Brands invests in Herbivore Earthfoods

##### PROSPECTS AND OPPORTUNITIES

Scrutiny increases over plant-based product labels as demand for alternatives rises

Demand for plant-based cheese expected to rise over forecast period

##### CATEGORY DATA

Table 81 Sales of Plant-Based Dairy by Category: Volume 2017-2022

Table 82 Sales of Plant-Based Dairy by Category: Value 2017-2022

Table 83 Sales of Plant-Based Dairy by Category: % Volume Growth 2017-2022

Table 84 Sales of Plant-Based Dairy by Category: % Value Growth 2017-2022

Table 85 Sales of Other Plant-Based Milk by Type: % Value 2019-2022

Table 86 NBO Company Shares of Plant-Based Dairy: % Value 2018-2022

Table 87 LBN Brand Shares of Plant-Based Dairy: % Value 2019-2022

Table 88 Distribution of Plant-Based Dairy by Format: % Value 2017-2022

Table 89 Forecast Sales of Plant-Based Dairy by Category: Volume 2022-2027

Table 90 □Forecast Sales of Plant-Based Dairy by Category: Value 2022-2027

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 91 □Forecast Sales of Plant-Based Dairy by Category: % Volume Growth 2022-2027

Table 92 □Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2022-2027

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

[www.scotts-international.com](http://www.scotts-international.com)

**Dairy Products and Alternatives in South Africa**

Market Direction | 2022-09-21 | 76 pages | Euromonitor

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

**ORDER FORM:**

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-10"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com