

## **Staple Foods in South Africa**

Market Direction | 2024-12-10 | 67 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

### **Report description:**

Retail volume sales of staple foods in South Africa are gradually rising in 2024, as an increasing number of local consumers find themselves in a better financial position compared to the previous year due to factors such as lower food inflation and decreased interest rates. The outcome of the South African national election also boosted the positive outlook, which saw the formation of the Government of National Unity (GNU) that aims to grow the local economy and focus on fiscal discipline. This...

Euromonitor International's Staple Foods 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 2019-2023, 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 2028, clearly indicating how the market is expected to change.

Product coverage: Baked Goods, Breakfast Cereals, Processed Fruit and Vegetables, Processed Meat, Seafood and Alternatives to Meat, Rice, Pasta and Noodles.

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

### **Why buy this report?**

- \* Get a detailed picture of the Staple Foods 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, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop

**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)

reliable information resources to help drive informed strategic planning.

## **Table of Contents:**

Staple Foods in South Africa  
Euromonitor International  
December 2024

List Of Contents And Tables

### **STAPLE FOODS IN SOUTH AFRICA**

#### **EXECUTIVE SUMMARY**

Staple foods in 2024: The big picture

Key trends in 2024

Competitive Landscape

Channel developments

What next for staple foods?

#### **MARKET DATA**

Table 1 Sales of Staple Foods by Category: Volume 2019-2024

Table 2 Sales of Staple Foods by Category: Value 2019-2024

Table 3 Sales of Staple Foods by Category: % Volume Growth 2019-2024

Table 4 Sales of Staple Foods by Category: % Value Growth 2019-2024

Table 5 NBO Company Shares of Staple Foods: % Value 2020-2024

Table 6 LBN Brand Shares of Staple Foods: % Value 2021-2024

Table 7 Penetration of Private Label by Category: % Value 2019-2024

Table 8 Distribution of Staple Foods by Format: % Value 2019-2024

Table 9 Forecast Sales of Staple Foods by Category: Volume 2024-2029

Table 10 □Forecast Sales of Staple Foods by Category: Value 2024-2029

Table 11 □Forecast Sales of Staple Foods by Category: % Volume Growth 2024-2029

Table 12 □Forecast Sales of Staple Foods by Category: % Value Growth 2024-2029

#### **DISCLAIMER**

#### **SOURCES**

Summary 1 Research Sources

### **BAKED GOODS IN SOUTH AFRICA**

#### **KEY DATA FINDINGS**

#### **2024 DEVELOPMENTS**

Intense competition and constrained market environment lead to another year of decline

Health and wellness trend drives up demand for flat bread and fortified options

Gradual shifts in consumers' purchasing behaviour influences distribution

#### **PROSPECTS AND OPPORTUNITIES**

Affordability expected to remain leading demand driver for bread as volatile global wheat prices persist

Tiger Consumer Brands calls for local partnership to reduce imports and boost local production

Private label set to continue lead innovation within cakes and pastries

#### **CATEGORY DATA**

Table 13 Sales of Baked Goods by Category: Volume 2019-2024

Table 14 Sales of Baked Goods by Category: Value 2019-2024

Table 15 Sales of Baked Goods by Category: % Volume Growth 2019-2024

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

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

www.scotts-international.com

Table 16 Sales of Baked Goods by Category: % Value Growth 2019-2024  
Table 17 Sales of Pastries by Type: % Value 2019-2024  
Table 18 NBO Company Shares of Baked Goods: % Value 2020-2024  
Table 19 LBN Brand Shares of Baked Goods: % Value 2021-2024  
Table 20 Distribution of Baked Goods by Format: % Value 2019-2024  
Table 21 Forecast Sales of Baked Goods by Category: Volume 2024-2029  
Table 22 □Forecast Sales of Baked Goods by Category: Value 2024-2029  
Table 23 □Forecast Sales of Baked Goods by Category: % Volume Growth 2024-2029  
Table 24 □Forecast Sales of Baked Goods by Category: % Value Growth 2024-2029

#### BREAKFAST CEREALS IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Consumers feel further pressure as food inflation continues to rise  
Healthier options dominate new breakfast cereal launches  
Rising costs lead to fewer promotions and loss of share

##### PROSPECTS AND OPPORTUNITIES

Weak performance expected over the forecast period due to elevated costs  
Health and wellness to support interest in fortified breakfast cereals  
Updates on food labelling legislation still likely in the future

##### CATEGORY DATA

Table 25 Sales of Breakfast Cereals by Category: Volume 2019-2024  
Table 26 Sales of Breakfast Cereals by Category: Value 2019-2024  
Table 27 Sales of Breakfast Cereals by Category: % Volume Growth 2019-2024  
Table 28 Sales of Breakfast Cereals by Category: % Value Growth 2019-2024  
Table 29 NBO Company Shares of Breakfast Cereals: % Value 2020-2024  
Table 30 LBN Brand Shares of Breakfast Cereals: % Value 2021-2024  
Table 31 Distribution of Breakfast Cereals by Format: % Value 2019-2024  
Table 32 Forecast Sales of Breakfast Cereals by Category: Volume 2024-2029  
Table 33 Forecast Sales of Breakfast Cereals by Category: Value 2024-2029  
Table 34 □Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2024-2029  
Table 35 □Forecast Sales of Breakfast Cereals by Category: % Value Growth 2024-2029

#### PROCESSED MEAT, SEAFOOD AND ALTERNATIVES TO MEAT IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Shelf stable seafood remains an important protein source in South Africa  
Lucky Star maintains strong performance despite temporary factory closure  
Rainbow Simply Chicken's innovative products drive solid performance

##### PROSPECTS AND OPPORTUNITIES

Shelf stable poultry set to intensify competition over the forecast period  
Further growth predicted for meat and seafood substitutes as target audience expands  
Updates on food labelling legislation still likely in the future

##### CATEGORY DATA

Table 36 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2019-2024  
Table 37 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2019-2024  
Table 38 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2019-2024  
Table 39 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2019-2024  
Table 40 Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2019-2024

**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 41 Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2019-2024  
Table 42 Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2019-2024  
Table 43 Sales of Frozen Processed Poultry by Type: % Value Breakdown 2019-2024  
Table 44 Sales of Frozen Processed Seafood by Type: % Value Breakdown 2019-2024  
Table 45 □NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2024  
Table 46 □LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2024  
Table 47 □Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2019-2024  
Table 48 □Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2024-2029  
Table 49 □Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2024-2029

#### PROCESSED FRUIT AND VEGETABLES IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Shelf stable beans enjoys robust growth through retail and foodservice as an affordable source of protein

Affordable options from private label continue to attract price-sensitive consumers

Increased import tariffs remain in place to protect local potato farmers

##### PROSPECTS AND OPPORTUNITIES

Consumers set to continue focusing on affordability to stretch household budgets

Home-cooking trend and leftovers culture expected to continue

Brands expected to leverage social media to increase consumer awareness and drive sales

##### CATEGORY DATA

Table 50 Sales of Processed Fruit and Vegetables by Category: Volume 2019-2024

Table 51 Sales of Processed Fruit and Vegetables by Category: Value 2019-2024

Table 52 Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2019-2024

Table 53 Sales of Processed Fruit and Vegetables by Category: % Value Growth 2019-2024

Table 54 Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2019-2024

Table 55 NBO Company Shares of Processed Fruit and Vegetables: % Value 2020-2024

Table 56 LBN Brand Shares of Processed Fruit and Vegetables: % Value 2021-2024

Table 57 Distribution of Processed Fruit and Vegetables by Format: % Value 2019-2024

Table 58 Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2024-2029

Table 59 □Forecast Sales of Processed Fruit and Vegetables by Category: Value 2024-2029

Table 60 □Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2024-2029

Table 61 □Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2024-2029

#### RICE, PASTA AND NOODLES IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Rice remains popular staple food in South African households due to affordability

Rising costs lead to fewer promotions and lost share

Supermarkets strengthens dominance as distribution channel

##### PROSPECTS AND OPPORTUNITIES

Home-cooking trend and leftovers culture expected to remain relevant

Price pressure on rice to potentially ease as India removes ban on exports and source markets report good yields

Brands expected to leverage social media to increase consumer awareness and drive sales

##### CATEGORY DATA

Table 62 Sales of Rice, Pasta and Noodles by Category: Volume 2019-2024

Table 63 Sales of Rice, Pasta and Noodles by Category: Value 2019-2024

Table 64 Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2019-2024

Table 65 Sales of Rice, Pasta and Noodles by Category: % Value Growth 2019-2024

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

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

www.scotts-international.com

Table 66 Sales of Instant Noodles by Leading Flavours: Rankings 2019-2024  
Table 67 NBO Company Shares of Rice, Pasta and Noodles: % Value 2020-2024  
Table 68 LBN Brand Shares of Rice, Pasta and Noodles: % Value 2021-2024  
Table 69 NBO Company Shares of Rice: % Value 2020-2024  
Table 70 LBN Brand Shares of Rice: % Value 2021-2024  
Table 71 □NBO Company Shares of Pasta: % Value 2020-2024  
Table 72 □LBN Brand Shares of Pasta: % Value 2021-2024  
Table 73 □NBO Company Shares of Noodles: % Value 2020-2024  
Table 74 □LBN Brand Shares of Noodles: % Value 2021-2024  
Table 75 □Distribution of Rice, Pasta and Noodles by Format: % Value 2019-2024  
Table 76 □Distribution of Rice by Format: % Value 2019-2024  
Table 77 □Distribution of Pasta by Format: % Value 2019-2024  
Table 78 □Distribution of Noodles by Format: % Value 2019-2024  
Table 79 □Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2024-2029  
Table 80 □Forecast Sales of Rice, Pasta and Noodles by Category: Value 2024-2029  
Table 81 □Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2024-2029  
Table 82 □Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2024-2029

**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)

**Staple Foods in South Africa**

Market Direction | 2024-12-10 | 67 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	€2150.00
	Multiple User License (1 Site)	€4300.00
	Multiple User License (Global)	€6450.00
		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