

# Processed Meat, Seafood and Alternatives To Meat in South Africa

November 2023

Table of Contents

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Positive performance overall, but foodservice remains the more dynamic channel

Price pressures help strengthen private label's leading position in the category

Shelf stable seafood remains an important protein source

### PROSPECTS AND OPPORTUNITIES

Dominance of private label will support positive outlook for chilled processed meat

Further dynamic growth predicted for meat and seafood substitutes as target audience expands

Regulations on meat and seafood substitutes likely to be clarified over forecast period

### CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 4 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 5 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 6 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 7 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 8 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023

Table 9 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023

Table 10 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 11 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 12 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 13 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 14 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

## Staple Foods in South Africa - Industry Overview

### EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

### MARKET DATA

Table 15 - Sales of Staple Foods by Category: Volume 2018-2023

Table 16 - Sales of Staple Foods by Category: Value 2018-2023

Table 17 - Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 18 - Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 19 - NBO Company Shares of Staple Foods: % Value 2019-2023

Table 20 - LBN Brand Shares of Staple Foods: % Value 2020-2023

Table 21 - Penetration of Private Label by Category: % Value 2018-2023

Table 22 - Distribution of Staple Foods by Format: % Value 2018-2023

Table 23 - Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 24 - Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 26 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

### DISCLAIMER

## SOURCES

### Summary 1 - Research Sources

#### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-south-africa/report](http://www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-south-africa/report).