



Staple Foods in South Africa

March 2026

Table of Contents

Staple Foods in South Africa

EXECUTIVE SUMMARY

Home cooking, price sensitivity and digital channels drive staple foods sales

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Staple food sales strengthen as home cooking dominates consumer habits

Rice, pasta and noodles benefit from shift towards affordable meal solutions

Price sensitivity shapes consumer choices

WHAT'S NEXT?

Steady growth expected as home cooking remains central

Retailers to seek alternative strategies as heavy promotions become unsustainable

E-commerce set for strong expansion

COMPETITIVE LANDSCAPE

Tiger Brands maintains leadership through broad portfolio and operational streamlining

Private label captures consumer attention

CHANNELS

Supermarkets remains primary channel

Small local grocers benefit from widespread presence

E-commerce is fastest-growing channel

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

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Baked Goods in South Africa

KEY DATA FINDINGS

2025 DEVELOPMENTS

Players invest in promotional strategies to sustain demand

INDUSTRY PERFORMANCE

Price pressures constrain volume sales

Frozen baked goods leads growth

WHAT'S NEXT?

Premium offerings will drive growth

Baked goods industry responds to functional food trends

South Africa considers stricter food labelling rules

COMPETITIVE LANDSCAPE

Simba maintains leadership through bread and dessert mixes

RCL and Tiger register robust growth

CHANNELS

Supermarkets remains dominant distribution channel

E-commerce continues to gain ground

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 17 - Sales of Pastries by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

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[Breakfast Cereals in South Africa](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price pressures shape demand

INDUSTRY PERFORMANCE

Sluggish demand amid rising costs

Muesli and granola leads growth

WHAT'S NEXT?

Volume sales will remain under pressure

Health and wellness will drive innovation

Changes to food labelling regulations await implementation

COMPETITIVE LANDSCAPE

Simba and Tiger face intensified competition

Vital Health Foods benefits from rising interest in healthier options

CHANNELS

Supermarkets leads distribution

E-commerce makes further gains

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

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Processed Fruit and Vegetables in South Africa

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience and value drive growth

INDUSTRY PERFORMANCE

Demand remains robust amid budget pressures

Frozen processed vegetables leads growth

WHAT'S NEXT?

Processed fruit and vegetables to maintain its upward trajectory

Health and functional nutrition will increasingly shape consumer preferences

New food labelling regulations await implementation

COMPETITIVE LANDSCAPE

Tiger maintains leadership

Private label drives growth

CHANNELS

Supermarkets remains dominant channel

Small local grocers channel gains ground

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Meat, Seafood and Alternatives To Meat in South Africa

KEY DATA FINDINGS

2025 DEVELOPMENTS

Resilient demand amid budget pressures

INDUSTRY PERFORMANCE

Affordable protein options sustain consumer interest

Frozen processed poultry maintains momentum

WHAT'S NEXT?

Affordability will drive demand

Health and wellness trends will play increasingly important role

Proposed food labelling regulation could influence product positioning

COMPETITIVE LANDSCAPE

Oceana Brands retains leadership despite gradual share erosion

RCL leads growth as private label strengthens its impact

CHANNELS

Supermarkets remains primary channel

E-commerce continues to expand

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

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[Rice, Pasta and Noodles in South Africa](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability, innovation and convenience drive demand

INDUSTRY PERFORMANCE

Rice, pasta and noodles benefit from substitution trends

Noodles capitalises on rising popularity of Asian cuisine

WHAT'S NEXT?

Steady growth expected

Health and wellness trends impact consumer choices

Possible changes to food labelling regulations could impact new product development

COMPETITIVE LANDSCAPE

Tiger invests in operational efficiencies to remain competitive

Smaller instant noodle players drive growth

CHANNELS

Supermarkets leads distribution

E-commerce drives growth

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

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