Staple Foods in South Africa

March 2026

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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

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Price pressures constrain volume sales

Frozen baked goods leads growth

WHAT'S NEXT?

Premium offerings will drive growth

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

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Supermarkets remains primary channel

E-commerce continues to expand

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Affordability, innovation and convenience drive demand

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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

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CATEGORY DATA

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