



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

Baked goods industry responds to functional food trends

South Africa considers stricter food labelling rules

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RCL and Tiger register robust growth

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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

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INDUSTRY PERFORMANCE

Demand remains robust amid budget pressures

Frozen processed vegetables leads growth

WHAT'S NEXT?

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Health and functional nutrition will increasingly shape consumer preferences

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Private label drives growth

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Health and wellness trends will play increasingly important role

Proposed food labelling regulation could influence product positioning

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INDUSTRY PERFORMANCE

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Health and wellness trends impact consumer choices

Possible changes to food labelling regulations could impact new product development

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Supermarkets leads distribution

E-commerce drives growth

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