



**Euromonitor
International**

Processed Meat, Seafood and Alternatives To Meat in South Africa

March 2026

Processed Meat, Seafood and Alternatives To Meat in South Africa - Category analysis

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

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

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Table 6 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 7 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

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Table 10 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 11 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 12 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

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Staple Foods in South Africa - Industry Overview

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

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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.