



**TRENDS OF THE RETAIL SALES OF NINE DAIRY AND EIGHT OTHER  
GENERALLY USED FOOD PRODUCTS, BASED ON INFORMATION UP  
TO **DECEMBER 2024** OBTAINED FROM NIELSENIQ  
(A report prepared by the Office of SAMPRO for Milk SA)**

*This report was compiled by the Office of SAMPRO and forms part of the Industry Information Project of Milk SA. The purpose of the project is to make market signals available to members and other interested parties, which is a prerequisite for effective competition, as envisaged by the Competition Act.*

*All activities of the Industry Information Project of Milk SA are designed and implemented in accordance with the Competition Act and independently from any commercial interest.*

**SYNOPSIS**

- ***This report covers the performance (sales quantities and average prices) in the retail market of 17 food products consisting of 9 dairy products and 8 other generally used food products.***
- ***The performance (retail sales quantity and price) of any particular food product can, and typically does, change meaningfully during a period of even as short as a few months.***
- ***The performance (retail sales quantity and price) of the different food products differs.***

**Important observations in respect of the retail sales quantities (Table 9) were as follows:**

- In the year which ended in December 2024, the retail sales quantities of thirteen of the seventeen food products, were higher than in the year which ended in December 2023, and eight of the thirteen food products are dairy products;
- In the six-months which ended in December 2024, the retail sales quantities of eleven of the seventeen food products, were higher than in the same months of 2023, and seven of the eleven food products were dairy products; and
- In December 2024, the retail sales quantities of fifteen of the seventeen food products were higher than in December 2023 and eight of the fifteen food products were dairy products.

**Important observations in respect the average retail prices (Table 10) were as follows:**

- In December 2024, the retail prices of eleven of the seventeen food products were higher than December 2023 (12 months ago) and five of the eleven food products were dairy products
- In December 2024, the retail prices of eleven of the seventeen food products were higher than June 2024 (6 months ago) and five of the eleven food products were dairy products; and
- From November 2024 to December 2024, the retail prices of five of the seventeen food products increased and two of the five products were dairy products.

***(The figures and analyses in this report are of a macro nature and the position of the different role-players may differ meaningfully from the macro position)***

## **Introduction**

1. In the report attention is given to trends of retail sales (quantity and average price) of nine dairy products and eight other generally used food products which consist of four starch products, one fat product and three beverages. The products are listed in Table 1.

**TABLE 1: PRODUCTS COVERED BY THIS REPORT**

<b>DAIRY PRODUCTS</b>	<b>OTHER FOOD PRODUCTS</b>
Fresh milk	Instant cereal
Long life milk (UHT)	Bread
Flavoured Milk	Rice
Yoghurt	Maize meal
Maas	Margarine
Pre-packaged cheese	Tea
Cream cheese	Coffee
Butter	Short life juice
Cream	

2. In the next sections of this report, separate attention is given to the performance in terms of quantity and price in the retail market of:
  - (a) Nine dairy products,
  - (b) Eight other food products consisting of four starch products, one fat product and three beverages; and
  - (c) A comparison between (a) and (b).

## Dairy Products

3. The trends in the retail markets for the different dairy products in the recent past are important market signals to stimulate timeous adjustment of the supply of each of the different products to follow demand. Such adjustment is in the interests of the consumer, the dairy industry, the appropriate use of national resources and effective competition in the markets concerned.
4. “NielsenIQ” provides information based on monthly surveys of the retail sales of milk and other dairy products. Non-retail sales, such as sales to wholesalers and industrial buyers, which form significant parts of the total sales of dairy products, are not part of the NielsenIQ surveys.
5. In assessing the research results of NielsenIQ, the following should be taken into account:
  - *The research is based on surveys which do not cover all retail outlets in South Africa,*
  - *The research results show the performance of the retail outlets covered by the surveys and cannot in an unqualified way be described as the performance of the total South African consumer market,*
  - *In respect of UHT milk, flavoured milk, yoghurt, maas and pre-packaged cheese, the surveys cover a significantly higher number of different types of retail shops than is the case in respect of fresh milk, cream, butter, cottage cheese and cream cheese,*
  - *The surveys do not cover non-retail sales of dairy products. Non-retail sales represent a meaningful part of the total sales of dairy products,*
  - *The surveys cover the retail sales of South African and imported products,*
  - *As market signals, it is important not to report on only the change in the quantity (mass or volume) of sales but also the changes of the average price due to the very obvious fact that there is significant interaction between the price and the quantity of sales,*
  - *The figures and analyses in this report are of a macro nature and the position of the different role-players may differ meaningfully from the macro position,*
  - *The consumer market consists of different segments, like segments based on the income of consumers. The dairy products which are regarded by higher income consumers as necessities and which are used daily, are for lower income consumers luxuries purchased in smaller quantities or less frequently. This situation explains why a change of the price of even the most basic dairy product, namely pasteurised milk, influences the quantity sold. Similarly, changes in the income of consumers impact on the quantity sold,*
  - *In terms of the production-orientated approach, the different dairy products are closely related but, in terms of a market-orientated approach the differences between the different dairy products are significant. This is due to especially the differences in respect of the nature, use, price and image of the different dairy products; and*

➤ The retail situation is much more complex than, for example, a few decades ago. Dairy products are not only competing with substitute products, but also with a host of other products and services which are offered by different industries to the consumer. For example, in some market segments, the consumer weighs up the benefits of purchasing dairy products versus the benefit of buying totally unrelated products and services.

6. In the case of fresh milk, cream and butter, the surveys of “NielsenIQ” cover only “major stores” as described in paragraph 5.
7. The performance of the dairy products concerned in the retail market, as measured by NielsenIQ, is set out in Tables 3 to 5.
8. Although the surveys of NielsenIQ in respect of the products mentioned in the previous paragraph only cover “major stores”, the results of the surveys should be regarded as meaningful indicators of the trends in retail sales. In the table below, the NielsenIQ sample for 2023, is expressed as a percentage of the estimated total demand<sup>1)</sup> in the same period.

#### NIELSENIQ SAMPLE AS PERCENTAGE OF THE ESTIMATED TOTAL DEMAND

PRODUCT		A NIELSENIQ SAMPLE <sup>2)</sup>	B ESTIMATED TOTAL DEMAND <sup>1)</sup>	A AS PERCENTAGE OF B
Pasteurised milk and ESL milk	(Litre)	212 906 552	494 128 395	43.1
UHT and sterilised Milk	(Litre)	500 995 190	949 634 954	52.8
Flavoured milk	(Litre)	15 442 041	41 848 039	36.9
Yoghurt and snacks	(Litre)	172 434 813	206 009 421	83.7
Maas	(Litre)	210 801 273	224 972 632	93.7
Pre-Packaged cheese <sup>3)</sup>	(Kg)	38 904 908	88 745 939	43.8
Cream cheese	(Kg)	3 154 709	4 911 318	64.2
Butter	(Kg)	9 158 101	21 218 952	43.2
Cream	(Litre)	10 287 601	18 711 773	55.0

1) *Estimated figures calculated by the Office of SAMPRO are based on the unprocessed milk allocations for the manufacturing of dairy products as supplied by Milk SA. In the case of cream cheese and cream the estimated figures are based on BMI figures of 2012 and 2013 and inflated by the growth rates as shown by NielsenIQ.*

2) *Retail sales plus non-retail sales for the period January to December 2023.*

3) *Includes hard and semi-hard cheeses, pre-packaged and other (excluded cream cheese)*

**TABLE 3:**

**CHANGES IN THE RETAIL SALES QUANTITIES FROM THE YEAR JANUARY 2023 TO DECEMBER 2023, TO THE YEAR JANUARY 2024 - DECEMBER 2024; AND CHANGES IN THE RETAIL PRICES FROM DECEMBER 2023 TO DECEMBER 2024**

PRODUCT	CHANGE IN RETAIL SALES QUANTITIES	CHANGE IN RETAIL PRICES
	PERCENT	PERCENT
FRESH MILK	-2.0	0.1
LONG LIFE MILK (UHT MILK)	5.8	-3.7
FLAVOURED MILK	0.5	6.0
YOGHURT	2.8	3.9
MAAS	6.8	-0.4
PRE-PACKAGED CHEESE	4.0	-3.1
CREAM CHEESE	4.1	2.2
BUTTER	5.1	-1.2
CREAM	2.6	0.8

\*

9. According to Table 3:

- a) In the year which ended in December 2024, the retail sales quantities of eight of the nine dairy products were from 0.5 to 6.8 percent higher than in the year which ended in December 2023; and
- b) In the year which ended in December 2024, the retail sales prices of five of the nine dairy products increased and two of the five products' retail sales prices increased at a rate higher than the inflation rate of 3.0 percent in December 2024. The price increases of two of the eight dairy products, were higher than the processed food inflation rate of 4.2 percent in the year which ended in December 2024.

10. The percentage changes in retail sales quantities indicated in Table 3, do not mean that the sales quantities changed continuously at the same rate, during the period concerned. This situation is illustrated in Table 4.

**TABLE 4:**

**CHANGES IN THE QUANTITIES OF RETAIL SALES OF SPECIFIC DAIRY PRODUCTS**

PRODUCT	Sales in the month of December 2024 versus the sales in the month of December 2023	Sales in the 3 months from October 2024 to December 2024 versus the sales in the 3 months from October 2023 to December 2023	Sales in the 6 months from July 2024 to December 2024 versus the sales in the 6 months from July 2023 to December 2023	Sales in the 9 months from April 2024 to December 2024 versus the sales in the 9 months from April 2023 to December 2023	Sales in the 12 months from January 2024 to December 2024 versus the sales in the 12 months from January 2023 to December 2023
	percent	percent	percent	percent	percent
Fresh Milk	-0.1	-0.7	-0.7	-0.8	-2.0
UHT milk	32.2	7.0	6.3	7.1	5.8
Flavoured milk	2.3	-1.0	-0.6	1.9	0.5
Yoghurt	9.5	4.1	3.9	4.0	2.8
Maas	16.2	8.8	7.2	8.5	6.8
Pre-packaged cheese	16.5	6.0	6.3	5.3	4.0
Cream cheese	0.6	2.9	3.4	3.2	4.1
Butter	25.3	4.5	6.7	5.9	5.1
Cream	3.2	3.8	3.7	2.7	2.6

11. Important observations in respect of Table 4, were as follows:

- a) In the year which ended in December 2024, the retail sales quantities of eight of the nine dairy products were higher than in the year which ended in December 2023,
- b) In the six months which ended in December 2024, the retail sales quantities of seven of the nine dairy products were higher than in the same six months of 2023,
- c) In the three months which ended in December 2024, the retail sales quantities of seven of the nine dairy products were higher than in the same three months of 2023; and
- d) In December 2024, the retail sales quantities of eight of the nine dairy products were higher than in December 2023.

12. The percentage changes in the average retail prices indicated in Table 3, do not mean that the prices changed continuously at the same rate, during the period concerned. This situation is illustrated in Table 5.

**TABLE 5:**

**CHANGES IN THE AVERAGE RETAIL PRICES OF SPECIFIC DAIRY PRODUCTS**

PRODUCT	December 2024 versus November 2024 (1 month ago)	December 2024 versus September 2024 (3 months ago)	December 2024 versus June 2024 (6 months ago)	December 2024 versus March 2024 (9 months ago)	December 2024 versus December 2023 (12 months ago)	December 2024 versus June 2023 (18 months ago)	December 2024 versus December 2022 (24 months ago)
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
FRESH MILK	0.8	0.1	-0.8	0.1	0.1	0.1	11.6
UHT MILK	-3.4	-2.7	-2.8	-0.9	-3.7	-3.4	7.4
FLAVOURED MILK	-2.0	-2.9	1.3	1.5	6.0	1.7	11.9
YOGHURT	-2.9	-2.3	-0.5	1.3	3.9	3.8	13.3
MAAS	-1.7	-1.5	-1.4	0.02	-0.4	1.4	13.2
PRE-PACKAGED CHEESE	-1.4	1.3	1.1	-0.4	-3.1	6.8	7.9
CREAM CHEESE	3.5	4.6	2.0	8.5	2.2	7.6	14.4
BUTTER	-1.7	-3.5	-2.7	0.1	-1.2	-2.0	0.03
CREAM	-0.3	0.1	0.3	1.6	0.8	3.1	10.4

13. Important observations in respect of Table 5, were as follows:

- a) In the year which ended in December 2024, the retail prices of five of the nine dairy products increased,
- b) In the six months which ended in December 2024, the retail prices of four of the nine dairy products increased,
- c) In the three months which ended in December 2024, the retail prices of four of the nine dairy products increased; and
- d) From November 2024 to December 2024, the retail prices of two of the nine dairy products increased.

## OTHER FOOD PRODUCTS

14. The performance of the eight food products concerned in the retail market, as measured by NielsenIQ, is set out in Tables 6 to 8.

**TABLE 6:**

**CHANGES IN THE RETAIL SALES QUANTITIES FROM THE YEAR JANUARY 2023 TO DECEMBER 2023, TO THE YEAR JANUARY 2024 - DECEMBER 2024; AND CHANGES IN THE RETAIL PRICES FROM DECEMBER 2023 TO DECEMBER 2024 OF SPECIFIC FOOD PRODUCTS**

FOOD PRODUCTS	CHANGE IN RETAIL SALES QUANTITY	CHANGE IN RETAIL PRICES
	PERCENT	PERCENT
INSTANT CEREALS	2.4	-0.01
BREAD	-0.1	3.5
RICE	0.1	4.5
MAIZE MEAL	2.9	16.5
MARGARINE	0.7	-1.6
TEA	-3.5	8.4
COFFEE	-4.2	9.0
SHORT LIFE JUICE	0.8	6.7

15. According to Table 6:

- a) In the year which ended in December 2024, the retail sales quantities of five of the eight other food products were from 0.1 to 2.9 percent higher than in the year which ended in December 2023; and
- b) In the year which ended in December 2024, the retail sales prices of six of the eight other food products increased and all six products retail sales prices increased at a rate higher than the inflation rate of 3.0 percent in December 2024. **The price increases of six of the eight dairy products, were higher than the processed food inflation rate of 4.2 percent in the year which ended in December 2024.**



16. The percentage changes in retail sales quantities indicated in Table 6, do not mean that the sales quantities changed continuously at the same rate, during the period concerned. This situation is illustrated in Table 7.

**TABLE 7:**

**CHANGES IN THE QUANTITIES OF RETAIL SALES OF SPECIFIC FOOD PRODUCTS**

PRODUCT	Sales in the month of December 2024 versus the sales in the month of December 2023	Sales in the 3 months from October 2024 to December 2024 versus the sales in the 3 months from October 2023 to December 2023	Sales in the 6 months from July 2024 to December 2024 versus the sales in the 6 months from July 2023 to December 2023	Sales in the 9 months from April 2024 to December 2024 versus the sales in the 9 months from April 2023 to December 2023	Sales in the 12 months from January 2024 to December 2024 versus the sales in the 12 months from January 2023 to December 2023
	percent	percent	percent	percent	percent
INSTANT CEREALS	17.0	2.5	2.8	3.1	2.4
BREAD	3.5	1.6	1.2	1.4	-0.1
RICE	11.2	4.6	2.3	1.5	0.1
MAIZE MEAL	-1.5	-5.3	-3.8	0.5	2.9
MARGARINE	17.5	1.4	1.7	0.9	0.7
TEA	7.3	-3.6	-3.0	-3.0	-3.5
COFFEE	26.9	-1.8	-3.9	-5.3	-4.2
SHORT LIFE JUICE	2.4	-1.1	-1.5	-0.9	0.8

17. Important observations in respect of Table 7, were as follows:

- a) In the year which ended in December 2024, the retail sales quantities of five of the eight food products were higher than in the year which ended in December 2023;
- b) In the six months which ended in December 2024, the retail sales quantities of four of the eight food products were higher than in the same months of 2022 and 2023;
- c) In the three months which ended in December 2024, the retail sales quantities of four of the eight food products, were higher than in the same months of 2023; and
- d) In December 2024, the retail sales quantities of seven of the eight food products, were higher than in December 2023.

18. The percentage changes in retail prices indicated in Table 6, do not mean that the prices changed continuously at the same rate, during the period concerned. This situation is illustrated in Table 8.

**TABLE 8:**

**CHANGES IN THE AVERAGE RETAIL PRICES OF SPECIFIC FOOD PRODUCTS**

PRODUCT	December 2024 versus November 2024 (1 month ago)	December 2024 versus September 2024 (3 months ago)	December 2024 versus June 2024 (6 months ago)	December 2024 versus March 2024 (9 months ago)	December 2024 versus December 2023 (12 months ago)	December 2024 versus June 2023 (18 months ago)	December 2024 versus December 2022 (24 months ago)
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
INSTANT CEREALS	-2.9	-0.6	2.3	0.2	-0.01	6.1	2.7
BREAD	0.4	1.0	3.8	5.3	3.5	5.2	8.9
RICE	-2.6	-2.6	-3.3	-1.6	4.5	25.2	33.6
MAIZE MEAL	1.4	3.5	9.0	17.1	16.5	11.5	10.4
MARGARINE	0.4	1.3	-0.3	-0.04	-1.6	3.9	-0.6
TEA	-5.1	-3.9	1.5	3.7	8.4	17.7	21.7
COFFEE	-5.6	-2.4	7.0	6.1	9.0	28.1	18.8
SHORT LIFE JUICE	-5.3	-5.9	-2.9	0.6	6.7	3.5	12.4

19. Important observations in respect of Table 8, were as follows:

- a) In the year which ended in December 2024, the retail prices of six of the eight food products, increased;
- b) In the six months which ended in December 2024, the retail prices of five of the eight food products, increased;
- c) In the three months which ended in December 2024, the retail prices of three of the eight food products, increased; and
- d) From November 2024 to December 2024, the retail prices of three of the eight food products, increased.

## Comparison of the performance in the retail market of the dairy products and the other food products concerned.

20. In Table 9, the changes in the retail sales quantities of the dairy products and the other food products concerned are indicated and ranked from the highest to the lowest. The highest increase in the relevant period is ranked as 1 and the lowest as 17.

**TABLE 9:**

### CHANGES IN THE QUANTITIES OF RETAIL SALES OF SPECIFIC DAIRY PRODUCTS AND SPECIFIC OTHER FOOD PRODUCTS

Product	SALES IN THE MONTH OF DECEMBER 2024 VERSUS THE SALES IN THE MONTH OF DECEMBER 2023		SALES IN THE 6 MONTHS FROM JULY 2024 TO DECEMBER 2024 VERSUS THE SALES IN THE 6 MONTHS FROM JULY 2023 TO DECEMBER 2023		SALES IN THE 12 MONTHS FROM JANUARY 2024 TO DECEMBER 2024 VERSUS THE SALES IN THE 12 MONTHS FROM JANUARY 2023 TO DECEMBER 2023	
	%	Ranking	%	Ranking	%	Ranking
Maas	16.2	7	7.2	1	6.8	1
UHT milk	32.2	1	6.3	3	5.8	2
Butter	25.3	3	6.7	2	5.1	3
Cream cheese	0.6	15	3.4	7	4.1	4
Pre-packaged cheese	16.5	6	6.3	4	4.0	5
Maize Meal	-1.5	17	-3.8	16	2.9	6
Yoghurt	9.5	9	3.9	5	2.8	7
Cream	3.2	12	3.7	6	2.6	8
Instant Cereals	17.0	5	2.8	8	2.4	9
Short Life Juice	2.4	13	-1.5	14	0.8	10
Margarine	17.5	4	1.7	10	0.7	11
Flavoured milk	2.3	14	-0.6	12	0.5	12
Rice	11.2	8	2.3	9	0.1	13
Bread	3.5	11	1.2	11	-0.1	14
Fresh Milk	-0.1	16	-0.7	13	-2.0	15
Tea	7.3	10	-3.0	15	-3.5	16
Coffee	26.9	2	-3.9	17	-4.2	17

21. Important observations in respect of Table 9, were as follows:
- a) In the year which ended in December 2024, the retail sales quantities of thirteen of the seventeen food products, were higher than in the year which ended in December 2023, and eight of the thirteen food products are dairy products;
  - b) In the six-months which ended in December 2024, the retail sales quantities of eleven of the seventeen food products, were higher than in the same months of 2023, and seven of the eleven food products were dairy products; and
  - c) In December 2024, the retail sales quantities of fifteen of the seventeen food products were higher than in December 2023 and eight of the fifteen food products were dairy products.
22. In Table 10, the increases and decreases in the average retail prices of the dairy products and the other food products in the different periods concerned, are indicated and ranked from the highest to the lowest.
23. Important observations in respect of Table 10, were as follows:
- a) In December 2024, the retail prices of eleven of the seventeen food products were higher than December 2023 (12 months ago) and five of the eleven food products were dairy products
  - b) In December 2024, the retail prices of eleven of the seventeen food products were higher than June 2024 (6 months ago) and five of the eleven food products were dairy products; and
  - c) From November 2024 to December 2024, the retail prices of five of the seventeen food products increased and two of the five products were dairy products.

**TABLE 10:**

**INCREASES AND DECREASES IN THE AVERAGE RETAIL PRICES OF SPECIFIC DAIRY PRODUCTS AND SPECIFIC OTHER FOOD PRODUCTS**

Product	DECEMBER 2024 VERSUS NOVEMBER 2024  (1 MONTH AGO)		DECEMBER 2024 VERSUS JUNE 2024  (6 MONTHS AGO)		DECEMBER 2024 VERSUS DECEMBER 2023  (12 MONTHS AGO)	
	%	Ranking	%	Ranking	%	Ranking
Maize Meal	1.4	2	9.0	1	16.5	1
Coffee	-5.6	17	7.0	2	9.0	2
Tea	-5.1	15	1.5	6	8.4	3
Short Life Juice	-5.3	16	-2.9	16	6.7	4
Flavoured milk	-2.0	10	1.3	8	6.0	5
Rice	-2.6	11	-3.3	17	4.5	6
Yoghurt	-2.9	12	-0.5	12	3.9	7
Bread	0.4	4	3.8	3	3.5	8
Cream cheese	3.5	1	2.0	5	2.2	9
Cream	-0.3	6	0.3	10	0.8	10
Fresh Milk	0.8	3	-0.8	13	0.1	11
Instant Cereals	-2.9	13	2.3	4	-0.01	12
Maas	-1.7	8	1.4	7	-0.4	13
Butter	-1.7	9	-2.7	14	-1.2	14
Margarine	0.4	5	-0.3	11	-1.6	15
Pre-packaged cheese	-1.4	7	1.1	9	-3.1	16
UHT milk	-3.4	14	-2.8	15	-3.7	17

Marietjie Le Roux  
De Wet Jonker  
Alwyn P Kraamwinkel

17 February 2025