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Media Feedback

2016 Category Quantification Report

Canned Protein in South Africa

Canned Protein – Product Definitions

Product	Definition
Canned Fish	This category includes all fish that has been canned, with the exception of any speciality seafood products.
Canned Meat	This category encompasses any meat that has been canned, including hams, corned beef, meatballs, vienna sausages, minced meat and curried meats.

Market Trends

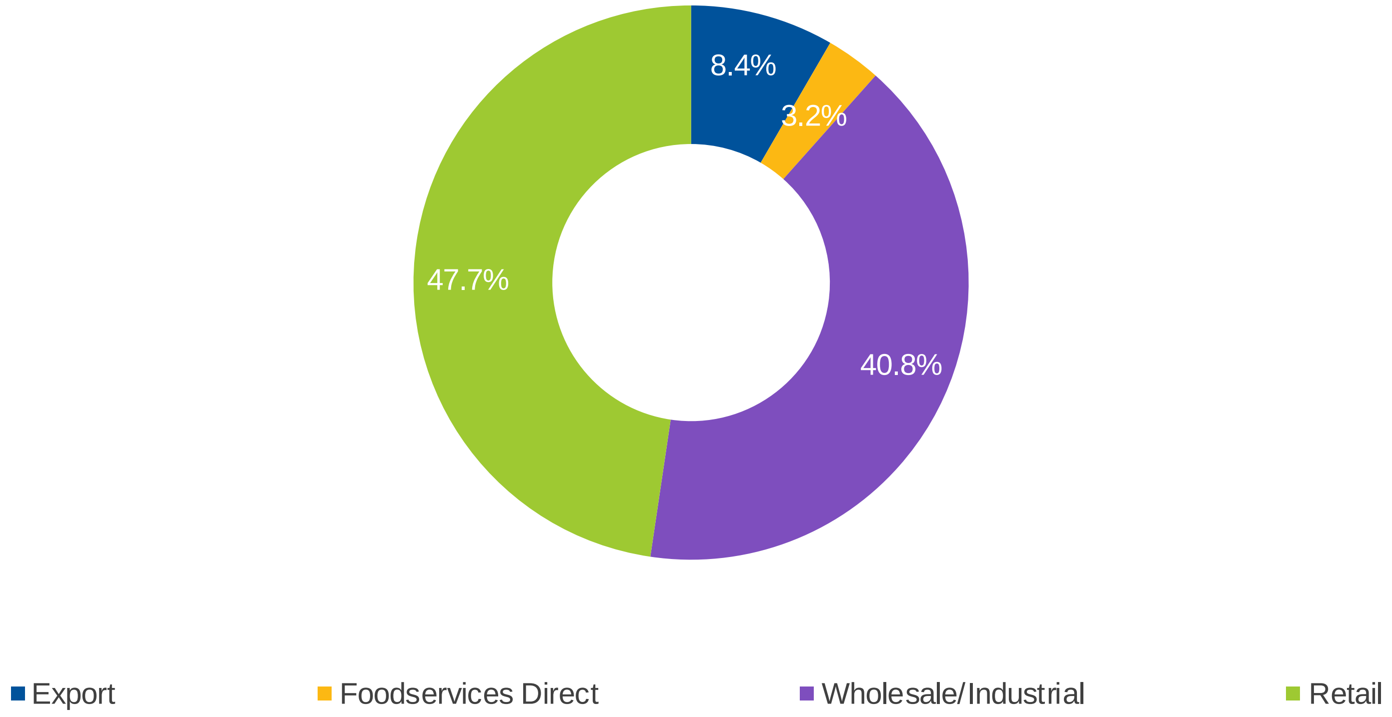
The canned protein market showed minimal year on year growth in 2015, compared to the healthy recovery seen in 2014. The category also recorded a healthy increase in value from 2014.

The canned fish category saw a few changes within the local market. It was mentioned by certain players in the industry that in order to keep costs low and to compensate for not reaching fishing quotas, frozen fish was imported and then canned in South Africa.

The canned meat category saw very healthy growth in 2015, with a year on year growth from 2014. Although a much smaller sector than canned fish, it is believed that the canned meat sector actively and aggressively competed with the canned fish industry with discounted pricing, innovative canned meat offerings, and resilient promotional activity in the retail and wholesale channels.

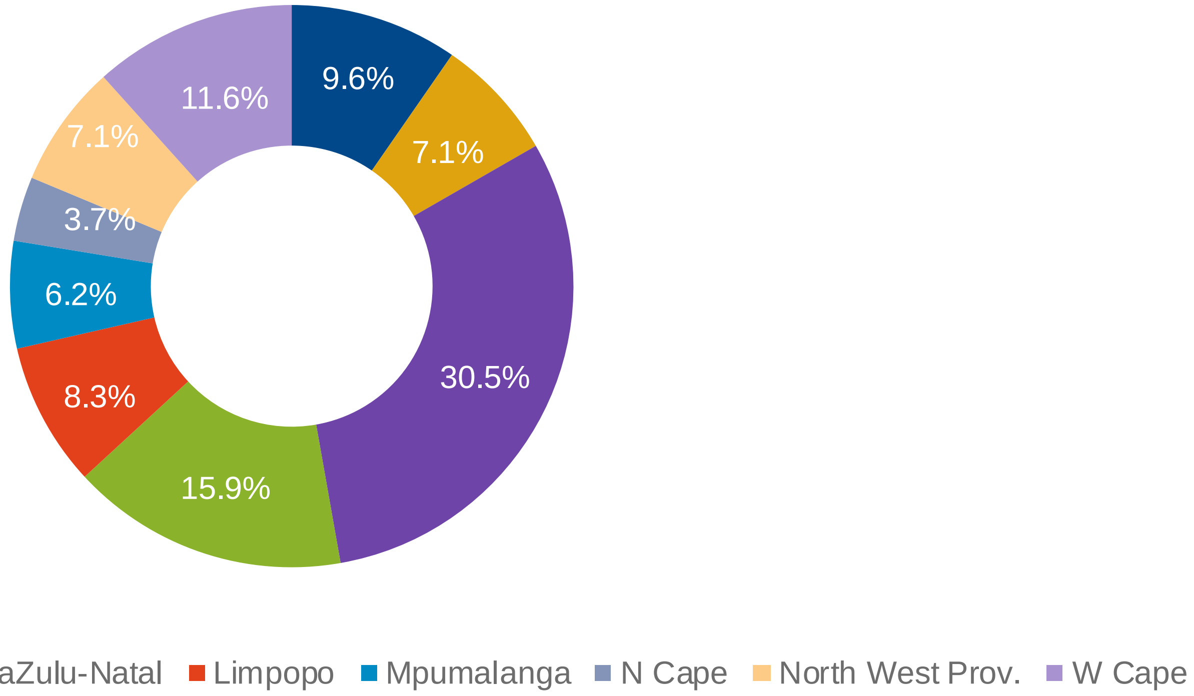
Canned protein remains strong in the retail and wholesale channels, and it is believed that there are more growth prospects in wholesale and bottom end retail as the category has not reached full market penetration within South Africa. The weaker Rand exchange rate has added to the significant growth for exports, especially within the canned meat sector.

Channel Distribution 2015



Retail, together with the export channel, gained volume share in 2015 compared to 2014. Wholesale/industrial showed positive growth for 2015 compared to 2014

Local Regional Distribution 2015



Gauteng is still the mainstay of regional volume distribution with 30.5% of volumes consumed in this province. Smaller populated regions such as Limpopo, the Northern Cape and Free State all showed positive growths for the year under review.

Excludes Exports

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BMi Tracking Report Schedule 2016

Packaging

All reports

- Packaging overview
- Paper & Board
- QPM
- Quarterly Import

Annual Beverage Publications

Full Report (All reports below)

Alcoholic Beverages

- Flavoured Alcoholic Beverages
- Malt Beer
- Sorghum Beer
- Spirits
- Wine

Non Alcoholic Beverages

- Bottled Water
- Carbonated Soft Drinks
- Cordials and Squash
- Energy Drinks
- Fruit Juice
- Iced Tea
- Mageu
- Sports Drinks

Dairy Beverages

- Dairy Juice Blends
- Drinking Yoghurt
- Flavoured Milk
- Maas
- Milk

Annual Food Publications

- Canned Protein
- Dairy
- Desserts
- F&C Beverages
- Pasta
- Rice
- Wheat and Grain

Confectionery & Snacks

- Ice Cream
- Packaging of Snack Foods
- South African Confectionery Market
- The Impulse Market in South Africa

On Request

- Biscuits and Rusks
- Breakfast Foods
- Baked Products
- Baking Aids
- Eggs
- Fats and Oils
- Frozen and Par-Baked Products
- Premixes
- Pre-prepared Meals
- Processed Meat Products
- Protein
- Sauces
- Soup and Condiments
- Sweet and Savoury Spreads
- Value Added Meals

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Category Quantification
Beverages
Food
Packaging
Competitive Advertising Tracking
Advertising & Campaign Testing
Omni Channel
Advertising
Advanced Analytics
Predictive Analytics
Competitive Pricing Simulation
Price Sensitivity
Statistical Optimisation Model
60%
Promotional Effectiveness

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Note:

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