

Canned, Chilled & Frozen Foods

Staple favourites and innovation will weather the economic storm

As retailers adapt to a post-pandemic trading environment, the effects of the economic downturn are becoming apparent. Consumers are constrained, buyer behaviour is shifting, and new factors are driving basket spend and shopper decisions.

In addition, the war in Ukraine among other factors is impacting negatively on global logistics and supply chains, which is filtering through to South Africa, fuel prices are up significantly, while ongoing load shedding is having a severe effect on the local economy. In this environment, what can we expect from the Canned, Chilled, and Frozen Foods categories?

All three categories rely on brand names, convenience, product innovation and new players to keep them thriving, fresh and appealing. Healthier ingredients and nutrient-dense meals are growing in demand.

Convenience remains a key driver of sales. Pre-prepared sides, ready-to-eat dishes, light meals- and child-friendly options are all time- and effort-savers. In addition, Canned, Chilled and Frozen are well-represented in private label.



Image courtesy of Los Muertos Crew, Pexels

Retailers are investing in their own-brand ranges and expanding on their existing ranges to offer consumers a viable alternative.

The cost of living

In June 2022, Business Tech published an article titled *Food price shocker: These grocery items are now way more expensive in South Africa*. In it, they detailed the extent of food price increases in South Africa and how this impacts the majority of households in the country.

The Household Affordability Index, released by the Pietermaritzburg Economic Justice & Dignity group (PMBEJD), showed food prices in the country were increasing steadily. Their Household Food Basket increased by R78.92 (+1.7%), going up from R4 609.89 in May 2022 to R4 688.81 in June 2022. The Index showed that year on year, the basket was up by R560.57 (+13.6%), from R4 128.33 in June 2021.

There are numerous reasons for this, but the fact remains that many food items are being priced out of the reach of many South African consumers. Because of this, producers, manufacturers, suppliers,



Serves: 4-6
Preparation time: 20 minutes
Cooking time: 1 hour

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The flavour combo reminds of Middle Eastern fare yet fits right into summer. A must-try!

INGREDIENTS

Chicken:

- 4 Tbsp (60ml) olive oil
- 3 Tbsp (45ml) finely grated fresh ginger
- Juice & zest of 1 orange
- 1 ½ Tbsp (20ml) ground cinnamon
- 1 Tbsp (15ml) dried thyme
- 2 tsp (10ml) ground cumin
- 2 tsp (10ml) salt
- ½ tsp (3ml) ground black pepper
- 1 x Chicken Braai Pack

INGREDIENTS

Sweet potato mash:

- 1.5kg orange sweet potato, peeled and cut into rough 3-4cm chunks
- 3 Tbsp (45ml) olive oil
- 1 tsp (5ml) salt
- ½ tsp (3ml) cinnamon
- 30g butter
- 1/3 cup (80ml) milk, warm

CINNAMON AND GINGER SPICED CHICKEN PIECES WITH SWEET POTATO MASH

Method:

Chicken:

- Prepare the chicken: Place the olive oil, ginger, orange juice & zest, cinnamon, thyme, cumin, salt and pepper into a large bowl and mix well. Add the chicken pieces and toss to coat, massaging the marinade into the chicken. Cover and refrigerate for at least one hour.
- Preheat the oven to 180°C.
- Place the chicken pieces skin side up in a roasting dish. Roast in the oven for 1 hour until golden and cooked through.
- For the sweet potato mash: Preheat the oven to 180°C.
- Place the sweet potato chunks onto a lined roasting tray. Drizzle over the olive oil, salt and cinnamon. Toss well.
- Roast for 25-30 minutes, until soft.
- Place the warm sweet potato into a bowl and mash. Add the butter and enough milk to get a creamy, smooth consistency. Serve the warm creamy sweet potato mash with the chicken pieces.



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and retailers are all having to become more agile and flexible in their offerings. Retailers can adjust their ranges to this reality by introducing new package sizes to cater for bulk-buyers, and smaller sizes for those who simply cannot afford more.

There are multiple examples of cheaper protein or plant-based alternatives in the Canned, Chilled and Frozen categories and these can be exposed and promoted to consumers through consistent advertising and working with suppliers to offer promotions and special offers. Advertising campaigns such as Lucky Star's 'Taste of Home' series also keep consumer interest alive in the canned category.

Consumer behaviour is showing a trend towards fewer shopping trips, with those that can afford to stocking up instead of making multiple trips. Consumers are also making purchasing decisions based on total basket spend and are less likely to travel around looking for individual deals, according to Ged Nooy, MD of NielsenIQ South Africa.

Canned foods: A can-do attitude

According to the Feed the Nation Foundation, canned foods are cost-effective, nutritious, shelf-stable, and long-lasting.

When it comes to goods such as chickpeas, peas, and beans, the cost difference of canned versus dry is not always significant and for the consumer, it usually comes down to the convenience of canned food, as well as the benefit of pest-resistant packaging that can also withstand adverse storage conditions such as damp. They are an excellent option for pantry staples and are a good resource for proteins such as corned beef and oily fish. Aluminium cans are also fully recyclable, making this a sustainable packaging option.

Canned goods are a staple for a large majority of South African consumers, driven by a longer shelf life than fresh food, budget friendly options, tummy fillers, and on hand when needed.

In terms of health and nutrition, many post-pandemic consumers are more health conscious and aware of what they're eating, so canned foods with less sugar and salt, and fewer or no preservatives are making their presence felt. Canned foods have made immense strides over the years and consumer trust in cans and their contents is paramount to the success of this massive category.

Canned food has seen some interesting new high-protein meat-alternative options launch into the South African market this year ...



Image courtesy of Pixabay, Pexels

The Household Affordability Index and Household Food Basket

The Pietermaritzburg Economic Justice & Dignity group (PMBEJD) Household Food Basket comprises 44 core food items most frequently purchased by lower-income households. Several of these fall into the Canned, Chilled, and Frozen categories. Many items saw a significant increase of over 10% year-on-year from June 2021 – June 2022 (with the exception of rice, which decreased, and carrots, peanut butter and oranges remaining virtually unchanged).

Cooking oil: +69%	Inyama yangaphakathi (offal/tripe): +15%
Spinach: +39%	Brown bread: +15%
Cake flour: +24%	Frozen chicken portions: +14%
Chicken livers: +24%	Eggs: +14%
Coffee creamer: +23%	White bread: +14%
Cabbage: +22%	Canned beans: +14%
Butternut: +21%	Tinned pilchards: +13%
Beef liver: +18%	Margarine: +12%
Beef: +18%	Maize meal: +11%
Samp: +18%	Bananas: +11%
Polony: +17%	Fish: +11%
Onions: +16%	Apricot jam: +11%
Boerewors: +15%	
Green pepper: +15%	

These increases have had a significant impact on household budgets.





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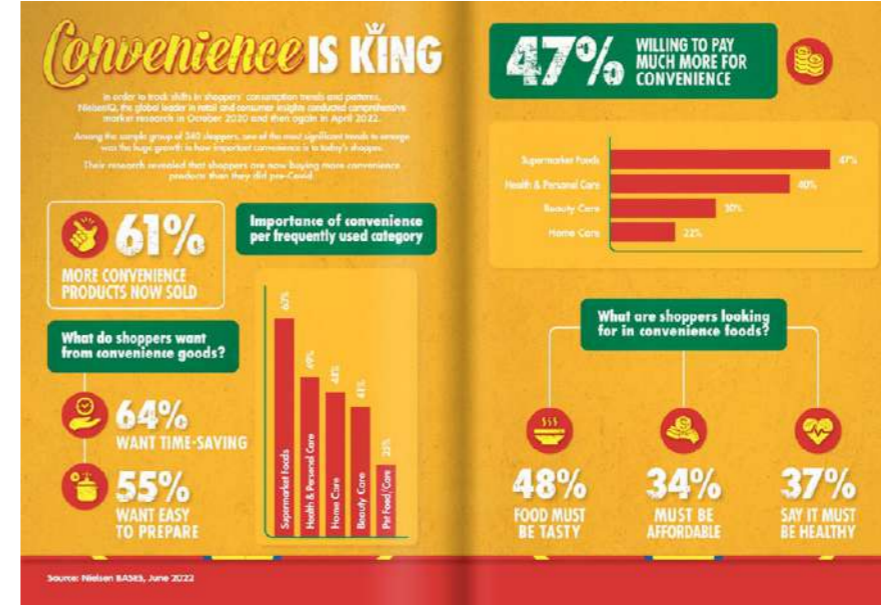
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Promasidor launched a canned version of its Sossi soybean protein chunks in June 2022. The brand, which has been available in East Africa (Ethiopia and Kenya) for some time, now has a canned version of the product in South Africa. Positioned as an high protein alternative, it is available in 3 variants – rich gravy, hot chilli sauce, and tomato sauce.



Saikav Foods is a South African producer of pre-soaked, pre-boiled Indian food in a can. In 2010, the company launched its first product 'Split Pea Dhall in a Can', and has since added other pre-soaked and pre-boiled canned products such as Gram Dhall, Chick Peas, Moong Dhall, Lentils, and Sugar Beans.



Lucky Star Soya Mince and Vegetable Stew in a can was launched in July 2022, in 3 variants.



KOO Pilchards was launched in Soweto in June 2022.



Tin Stuff is a Limpopo-based canning company selling canned chicken feet and necks.



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Frozen food takes off

When it comes to Frozen, buying products such as meat and vegetables in bulk makes sense for those who can afford it – or when it’s on promotion. Frozen vegetables are quicker to prepare than dried, and don’t have the associated risks of added salt or sugar. The taste and texture are also often much closer to that of fresh produce.



Image courtesy of Valeria Boltneva, Pexels

However, the difficulty with frozen foods, particularly in South Africa, is transport and storage. Many South Africans rely on public transport, which can be unreliable or overcrowded, which can result in their frozen food purchases defrosting on the way home. In addition, not all households have a means to store frozen food, and with load shedding, many homes in poorer areas are without power for increasingly large portions of the day. This makes safely storing frozen and chilled foods even more precarious. Some households share a chest freezer – a valuable asset for those living in small and crowded spaces – and ownership



“ The difficulty with frozen foods, particularly in South Africa, is transport and storage. Many South Africans rely on public transport, which can be unreliable or overcrowded, which can result in their frozen food purchases defrosting on the way home. ”

Image courtesy of OBC Protea Gardens Butcher

of refrigerators has steadily increased since 2010 (according to a 2021 University of Cape Town study, the appliances that most South African households own are fridges, geysers, washing machines and televisions). Increased fridge/freezer ownership has enabled a greater number of households to purchase and store chilled and frozen foods

The South African Frozen Food Market Overview, 2027 by research firm Global Information, stated that “Frozen food has become the mainstream food trend across the globe. Earlier, frozen food was only synonymous with desserts like ice creams, or some imported frozen fruits that multinationals catered to the market. This has changed dramatically in the last few years as we are witnessing its popularity among a large number of consumers.

In addition to that, frozen food products are increasingly becoming an integral part of our daily diet around the world. Busy lifestyles have driven the food manufacturing industry to produce new products to meet the rising demand from consumers, which, in turn, fuels the overall frozen food market.”

The report, published by Bonafide Research, found that the frozen food market was expected to experience exponential growth. It said, “International trade of frozen products has gained prominence, complemented by improved transportation facilities. Increased consumption of frozen food products in the emerging economies has also contributed to an increase in the sale of frozen bakery products. Other trends, such as packaging and shelf-life enhancement, present

further growth opportunities for the South Africa frozen food market. As a result, companies are investing in technologies to store refrigerated or retarded dough, frozen vegetables and meat, partially cooked, and fully cooked food for longer durations. Also, factors such as developments in the retail landscape and technological advancements in cold chain are driving the frozen food market.”



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Beef with Broccoli
foodengineeringmag.com

Online shopping has also driven the growth of frozen foods, along with the addition of plant-based foods, immunity-boosting foods, and personalised nutrition. The report goes on to say, “Focusing on the latest frozen food trends across the country, manufacturers have managed to revert the poor image these products had by going all-in on natural ingredients rich in functional benefits and that allow for new formulations of better quality, appearance and texture.”

Convenience and time-management were noted as frozen food category drivers, with the frozen meat segment predicted to remain one of the “largest segments on account of new product

Image courtesy of OBC Protea Gardens Butcher



launches.” The ready meals segment is expected to grow with a “higher compound annual growth rate (CAGR) during the forecast period owing to the pre-dominant consumption of ready meals among working-class people around the country.”

Covid-19 was named as a somewhat surprising driver in South Africa’s frozen foods market. “Frozen food sales surged during the Covid-19 lockdown period as consumers frequently turned to the freezer for a variety of meal occasions. Players in the space took advantage of new and innovative opportunities in functional ingredients, ready-to-eat meals, and colour-preserving clean label agents. Meanwhile, sustainability in frozen foods was elevated through eco-centric packaging models. This change in consumer behaviour and preference regarding health benefits is projected to increase the sales of frozen food by 2027.”

Globe Newswire presented *Frozen Ready Meals Market to Witness Impressive Expansion by 2029, Segmentation, Competitors Analysis, Revenue Growth, Size, Share and Future Trends* by Data Bridge Market Research. In this report it was stated that the Global frozen ready meals market will grow at a CAGR of 5.4% during the forecast period of 2022 to 2029. It was also noted that the global frozen food market

is projected to register a CAGR of 4.3% during the forecast period (2022–2027).

The report says, “Ready-to-eat food has evolved as one of the most diversified sections of the global ready-meal business in recent years. A growth in convenience patterns and an increase in demand for organic meals have led to a growing need for organic frozen packaged meals. The organic frozen food and beverage sector is another stop for on-the-go consumers, offering anything from frozen sweets to appetizers and meals.”

Key market trends indicated by Research and Markets in their *Frozen Food Market – Growth, Trends, Covid-19 Impact, and Forecasts (2022–2027)* report include an increasing demand for convenience food and a competitive landscape which will continue to drive category growth and fuel innovation.



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Chilled foods – A positive outlook

The chilled foods category is a significant one. It includes prepared meals, ready-to-cook, ready-to-bake, or ready-to-microwave, deli offerings, gourmet cheeses, oven-ready, and on-the-go snacks and meals. For many South Africans, the fridge is the place to go to obtain a quick, easy, and nutritious meal.

Market overviews suggest that the global chilled processed food market is projected to grow at a CAGR of 5.65% during the forecast period (2020–2025). Chilled processed foods that cook quickly and require minimal preparation are a must for time-constrained consumers.

Much like the frozen category, ready-made meals are also becoming increasingly popular, particularly as healthier ingredients, plant-based alternatives, and “good for you” foods become more readily available. From pizzas and pasta-dishes right through to poke bowls, sushi, protein-packed salads, and vegetarian curries, suppliers and retailers have been working hard to develop a range of innovative options that appeal to a variety of tastes and dietary requirements.

The cold chain

When it comes to frozen and chilled products, the cold chain is paramount. Not only does legislation govern this, but it is also absolutely critical for food safety and hygiene, as well as product life and customer satisfaction. From farm to plate is a catchy phrase with real meaning behind it. For William Racinne, South African Country



Director of Petit Forestier, understanding the cold chain and all its challenges is key. When Petit Forestier entered the South African market in 2018, they already had a reputation as the leaders in refrigerated transport across Europe. With over 100 years of experience, and a global footprint, they know a thing or two about the cold chain.

Offering short-, medium, and long-term refrigerated vehicle and container rental, Petit Forestier has an in-depth understanding of the industry. Racinne says, “Cold chain transportation necessitates additional actions such as reducing delays and appropriate storage. It requires a stable cargo setup throughout the transit process to

ensure food safety is not compromised, and that products arrive undamaged, particularly when it comes to aesthetic commodities. You still want frosting on your doughnuts upon delivery.”

Petit Forestier says retailers should ensure that their refrigerated transport supplier maximises high-tech solutions that take advantage of the many developments in the industry. “It is essential that food safety is main-

tained through live vehicle tracking, in-carriage temperature monitoring, frequent cleaning and sanitising, and the correct packing and loading processes and equipment to ensure sufficient airflow and ventilation.” In addition to this, Racinne notes the importance of sustainable vehicles. He says, “While electric vehicles are not entirely suitable to Eskom-powered cities, solar and battery-powered systems that reduce emissions while meeting all other client requirements are the future. Such alternatives could be well suited to the South African climate, while also lowering fuel consumption, making them more cost effective and environmentally friendly.”

Canned, chilled & frozen food trends



Image courtesy of sogaorganic.co.za

Organic products. Consumers are becoming more aware of ingredients, and they want to know what's going into the products they consume. SOGA Organic launched a certified organic citrus juice in 2015 and have kept a finger on the pulse of South African consumers since. Their latest offering is a 500ml frozen orange juice in a certified compostable bottle with print-on-bottle label, made 100% from sugarcane. According to SOGA, "South African consumers are becoming more aware, more informed and more demanding in terms of access to Certified Organic products." Locally grown, sustainable, and environmentally friendly are all watchwords that are become increasingly important to a large number of consumers.



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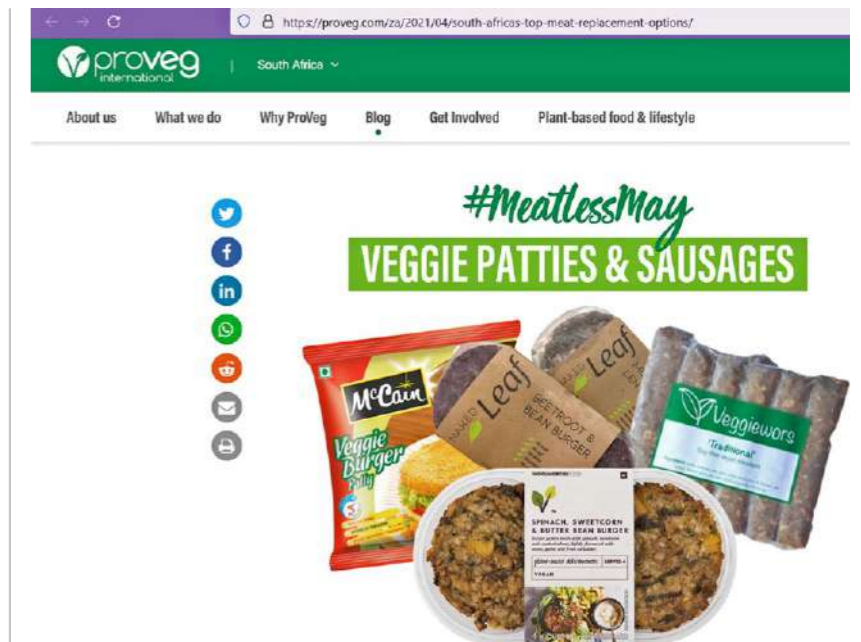
Frozen fruit and smoothie mixes are becoming increasingly popular for several reasons. Frozen fruit lasts longer than fresh and makes out-of-season fruits easily available. These products also reduce the potential for food waste. Frozen smoothie mixes are incredibly convenient for health-conscious consumers and busy families looking to inject a fast and easy burst of nutrition into their daily routine.

Frozen and chilled desserts are growing up. Don't get us wrong, South Africans love a good ice cream and chocolate mousse, ready-made jelly, and crême brûlée are perennial favourites in the frozen and chilled desserts section. But the dessert offering in both the chilled and frozen section has grown well beyond Italian kisses. Fancier desserts and international inspiration have made choosing a sweet treat a lot trickier, and that's a good thing. Convenience is a key factor, but so is skill – many home cooks are



Image courtesy of brenell.co.za

happier buying a dessert than attempting fiddly pastries and sugar craft on their own. Single serving portions are also ideal for families with small children and singletons who don't need to eat an entire cheesecake on their own.



Plant-based options are certainly becoming a more common sight in the canned, chilled and frozen aisles. And despite the recent upset over what these plant-based alternatives can be called, their presence, and the fight over names, proves that they are here to stay. Family braais are a big deal in South Africa, so providing an easily accessible option for non-meat eaters makes good business sense.



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'Gourmet' is a gold standard that consumers are coming to appreciate and trust. As an interest in international tastes was piqued by lockdown, shoppers were also drawn to unique and special at-home experiences. From chocolate and confectionary to alcoholic beverages and coffee, the premiumisation of certain products has taken hold. For many consumers, the term 'quality over quantity' holds true and they are increasingly willing to pay top prices for premium products. This can be seen in supermarket fridges and freezers which now hold gourmet imported and local cheeses, cold meats, condiments, pastries, seafood, and more.



Nostalgia and traditional flavours. Along with gourmet and premium foods, nostalgia and traditional flavours are also gaining ground. Take Parmalat's recently launched shisanyama-flavoured processed cheese slices, produced specifically with popular street food such as kotas and gatsbys in mind. Other innovations include novel twists on well-known favourites, such as apple and blackberry buttermilk pudding, and caramel chocolate malva pudding.



Frozen and chilled baby food and toddler meals. Frozen or chilled, these products are convenient and nutritious. With child-friendly flavours and ingredients designed to appeal to and even help develop young palates, the contents need to be low in salt and sugar and have their ingredients labelled clearly. Even moms relying on convenience foods will only feed their children food they feel they can trust.



Labelling is becoming a purchase driver. This is because newly health-conscious or environmentally aware consumers want to know exactly what is in their food, where it came from, how it was produced or grown, and in what it is packaged. They want to know what the salt, fat, and sugar content is, and they expect that information to be clearly and easily accessible. **SR**

Sources:

<https://modernmarketing.co.za/joe-public-partners-with-lucky-star-for-inspirational-television-advert/>



Ann Baker-Keulemans writes on topics related to business, lifestyle, technology, and health, with extensive knowledge on the SA retail and wholesale landscape. Contact annbk@wilkinsross.co.za | www.wilkinsrossglobal.com

Linda Wilkins, co-author of this article, can be contacted at: linda@wilkinsross.co.za or connect on LinkedIn www.linkedin.com/in/linda-wilkins

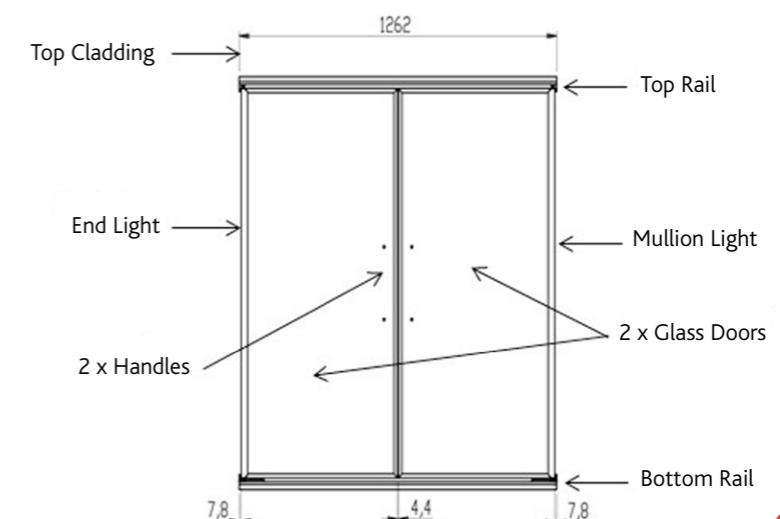
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