

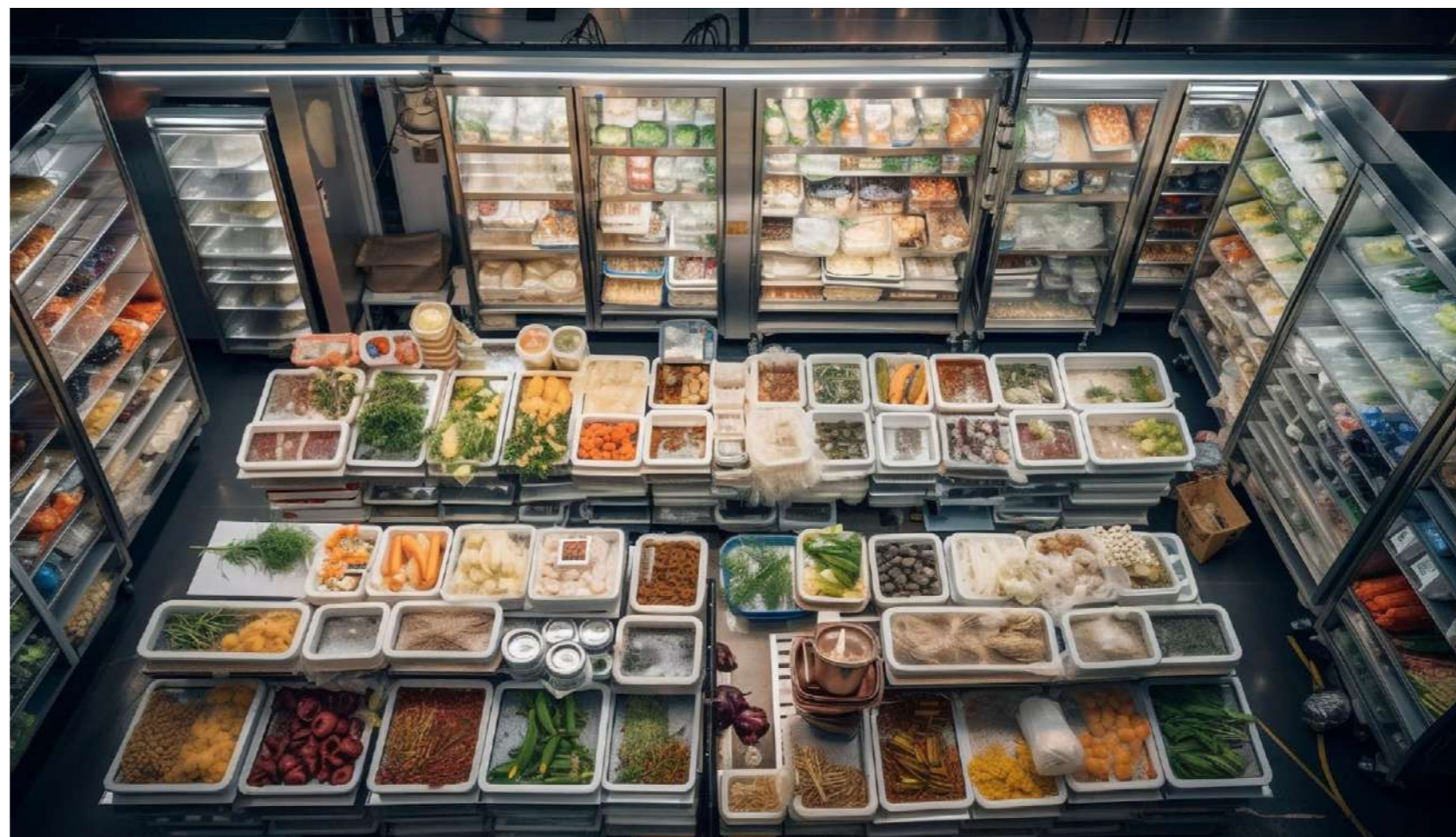
# Quality, freshness & convenience rule in the Canned, Bottled, Chilled & Frozen aisles

Convenience is king. This is an undeniable fact, but in a market that is demanding sustainable solutions while consumers face higher food prices, inflation and a challenging economic environment, the Canned, Bottled, Chilled, and Frozen Foods categories have an important role to play.



## Canned foods: Reliability, longevity, and something for everyone

Canned foods remain a pantry staple for South African consumers. Easy to store, shelf stable, nutritious, and often of high quality, they're a reliable and relatively cost-effective food solution. With its long shelf life, canned food reduces food wastage, while the cans themselves can be recycled and are economically efficient. However, canned foods also have high-end appeal, giving more adventurous and less cost-conscious consumers a way to access life's little food luxuries such as artichoke hearts, salmon, crab meat, mussels,



Freepik\_image by vecstock

oysters, anchovy fillets, condensed milk, coconut milk and coconut cream and olives. Canned foods also cater for healthy, nutritious eating, with canned beans, lentils, chickpeas, tuna, pilchards, sardines, canned tomatoes, and canned vegetables leading the way.

Some canned foods have seen significant price increases this year, such as canned beans (+17%) and canned pilchards (+11%), according to an article

in Business Tech, but cans still offer consumers affordability and they have the advantage of minimising food waste.

The Global Canned Food market is anticipated to rise at a considerable rate between 2023 and 2031. In South Africa, the market remains under pressure. RFG (Rhodes Food Group), which owns the Rhodes and Gold Dish canned brands, overcame challenging trading conditions to increase revenue



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Serves: 4 (2 buns per person)  
Preparation time: 20 minutes  
Cooking time: 20 minutes

## COUNTY FAIR, chicken nuggets

### Ingredients:

#### Chicken:

16 chicken nuggets  
Pickled Cucumber:  
1 cup water  
1/3 cup vinegar  
(apple cider or white)  
3 tbsp sugar  
Spicy Mayonnaise:  
1/2 cup mayonnaise  
1 tsp Sriracha sauce

#### Bao & Filling:

8 frozen bao buns  
small handful of radish  
10g coriander

#### Equipment:

Vegetable or basket steamer  
and cocktail sticks



Ideal for a family meal

Tasty & Delicious

## CHICKEN NUGGET BAO BUNS, PICKLED CUMBER, RADISH, SPICY MAYONNAISE AND CORIANDER

### Method:

#### Chicken:

Cook chicken nuggets according to the instructions on the packet.

#### Pickled Cucumber:

Peel cucumber into ribbons. De-gorge the ribbons by placing them into a colander over a bowl with a generous sprinkle of salt to draw out the water from the cucumber. Leave for 15 mins. In a small bowl add the water, vinegar, sugar, and salt. Stir to combine and until the sugar has dissolved. Add the cucumber (All the cucumbers should be covered in the brine). Let the mixture rest in the fridge until you are ready to eat.

#### Spicy mayonnaise:

Mix the mayonnaise ingredients in a bowl and side aside until serving.

#### Bao & Filling:

Cut out little squares of grease proof paper to go under the bao bun. Steam the Bao buns in a vegetable steamer on the hob, by adding a little water to the base pan, then placing the bao buns on the steaming rack above with a fitted lid. Steam for approx. 7mins. Finely slice the radish and pick the leaves whole from the coriander stalk. Assemble the buns by adding mayonnaise to the bottom bun then topping with pickled cucumber ribbon, chicken nuggets and reddish. Using a cocktail stick spear the top of the bun with a folded pickled cucumber ribbon.

**County Fair**



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 **Astral**





Image courtesy of Rhodes Food Group

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## Chilled and frozen foods are on a growth trajectory

Frozen food is in a global growth phase, and South Africa is no exception. Product innovation is adding energy and interest to the category, and the promise of convenience has always been one of the big attractions of the frozen aisles. Meanwhile chilled foods – including meat, chicken and fish, pizza, cakes and pies, oven-ready meals, desserts, yoghurts, cheese, and sandwiches – continue to grow. Chilled foods are practical and can be easily prepared and answer the need for convenience like no other.

Frozen meals, pre-prepared sides, ready-to-eat dishes, and child-friendly meals are time- and effort-savers, and retailers and wholesalers are also investing in own-label ranges that cater to these needs. As food technology improves, so too does the quality, lifespan, and ease-of-use of chilled and frozen products.



says the report, “regressed further to -8,9% over the 3-month period to end March 2023.”

Own brand/private label also competes heavily in the canned food, with leading retailers and independent groups offering private label alternatives. Increased promotional and marketing activity, 2-for-one specials, EDLP and brand campaigns will help to keep canned foods top of mind for cash-strapped consumers, as will reiterating their many benefits on a consistent basis. Canned goods remain staples in South Africa for several reasons, longevity and food safety among them. The other is their pest-resistance. In a country where the majority of consumers are dealing with pests including insects and rodents, which pose a significant risk to their food security, canned goods are a safe and reliable option.

In addition, canned goods have no reliance on an unstable electricity grid and can safely withstand recurring and frequent load shedding without impacting food quality or safety. This is a level of security that drives the purchase decisions of many consumers.

by 10.0% in the 11 months to August 2023, however “volumes in the canned fruit and vegetable categories remain under pressure from weak consumer demand, high raw material and packaging costs as well as the competitive environment.”

Tiger Brands reported an “increasingly tough consumer environment with accelerating volume declines and a clear shift towards essentials in its interim results presentation dated 23 May 2023 (TB Results Presentation\_H1F23\_F.pdf), with a volume decline of 3,2% for their canned foods category over the 12-month period, which,





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### Convenience and innovation drive frozen foods

When it comes to frozen foods, the category is fast. From single-source ingredients to complete meals, individual portions, family-size servings, and bulk catering options right through to baby food, it's a massive and highly competitive market. In fact, a report for Future Market Insights states that, "The frozen food market share is on the cusp of significant expansion, exhibiting a projected value of US\$335 342 million (R6 304 010 million) in 2023.

This growth has largely been attributed to convenience, and increased consumer demand for ready-to-eat or easy-to-prepare meals and foods. The shelf-life and versatility of frozen foods, as well as an increase in options that meet different dietary requirements, such as plant-based or gluten-free, for example, have helped drive this category.

The frozen ready meal market also continues to expand, with various market researchers forecasting a CAGR growth of 4.24%. Covering several key product types, including fruits and vegetables, potatoes, ready meals, meat, fish and seafood, and soups, there is much scope for product development and expanded product lines.

Image courtesy of [www.packagingnews.co.uk/](http://www.packagingnews.co.uk/)



Image courtesy of [www.oetker.co.za](http://www.oetker.co.za)



### Frozen pizza becomes a South African favourite

The frozen pizza category has been embraced by South African shoppers. The Dr. Oetker brand is recognised as an industry leader in this market and judging by their recent acquisition of German-based frozen snack maker Galileo, they are confident that the frozen pizza market is going to continue growing.

Germany's Bundeskartellamt (The Federal Cartel Office is an independent competition authority whose task is to protect competition in Germany) recently cleared the takeover.

In a press release, Andreas Mundt, President of the Bundeskartellamt, says, "The market for frozen pizza is very concentrated. Dr. Oetker is the market leader, and by acquiring Galileo, it takes over an important manufacturer of private label products. We are clearing the takeover based on extensive investigations and we looked into the case from all conceivable angles." The investigations lead the Bundeskartellamt to determine that ...

“ The market has become very dynamic over the last few years. New competitors are putting pressure on established brands. Frozen pizzas from brand manufacturers are increasingly available at food discount stores and sales generated through special offers are gaining in importance. ”



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### WHAT HAPPENS WHEN THE LIGHTS GO OUT?

The Effects of Load Shedding on Chicken

**Larger portions**

Older = larger chickens = larger chickens

**TEMPORARY CHALLENGES**

**Fewer portions in pack = same weight**

**Same quality!**

**Perfect for all recipes**

**COOKING TIME**

**Astral Festive**

### Chilled and frozen foods face a uniquely South African challenge

Of course, the chilled and frozen categories are faced with a challenge in the form of load shedding. Any disruption to the cold chain can be devastating, impacting food quality and safety, and resulting in wastage and product loss, and potential consumer complaints. Being prepared means having alternative energy backups in place, training staff on appropriate actions, and safeguarding the cold chain.

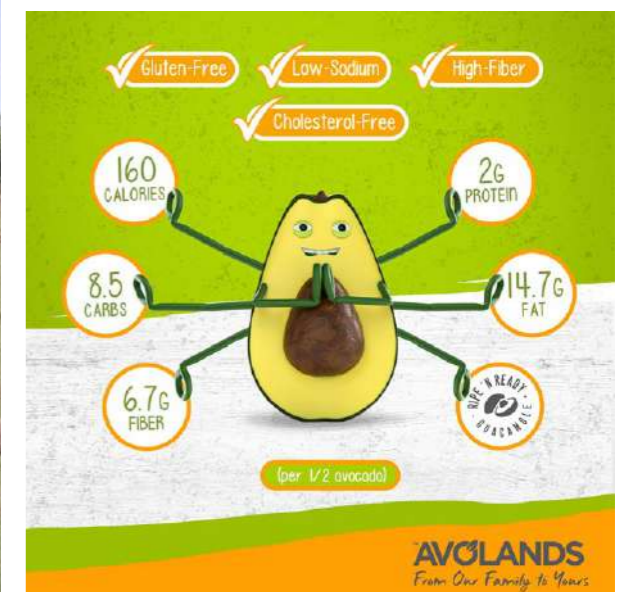
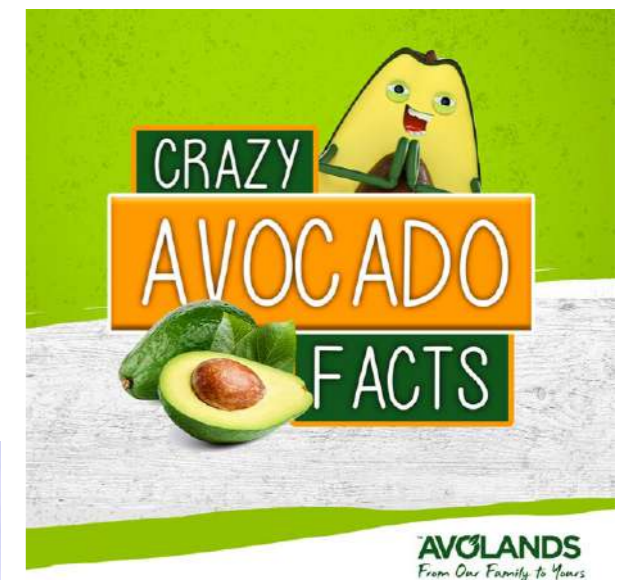
Estelle Howcroft, National Sales Coordinator at Avolands, says, "We keep our frozen stock between -18 and -25 degrees Celsius. Obviously, our cold chain management is of utmost importance, so our management process includes rigorous quality checks at each stage of the supply chain, from

the orchards to our packaging facilities, to ensure only the best avocados are selected."

Avolands' avocado-based mayo, which combines the richness of avocados with the texture of traditional mayonnaise offers an innovative alternative. In addition, they will also be introducing frozen avocado that is pre-sliced and ready to use.

Of course, being a South African company means they have to deal with load shedding, as she adds, "When load shedding or power disruptions occur, our facilities are equipped with backup generators. These generators kick in seamlessly to maintain the required temperature and conditions in our storage

units. Our staff are also trained to respond effectively to unexpected power interruptions, activating backup systems and implementing emergency protocols to prevent any compromise in the cold chain."







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## Bottled goods continue to grow



Image courtesy of <https://oliveoil.co.za/>



### CASE STUDY

#### Olive oil continues to make its mark in SA

Frans Ferreira, a Marketing and Key Accounts Consultant at Wilsons Foods, has seen first-hand how the bottled goods category is growing. For example, olive oil has seen something of a renaissance in South Africa, only this time it's about so much more than salads. Health-conscious consumers are turning to oil alternatives that are 'better for you', gourmards are experimenting with flavoured oils, and artisanal producers are making their mark in terms of market share and international acclaim.

Ferreira explains how convenience and shelf-life are driving growth in this category. He says, "Glass bottled Edible Oil products have been gaining traction for quite some time in South Africa, primarily due to their long shelf-life and the convenience they offer. Consumers are increasingly drawn to products that promise durability and ease

of use. The market's growth is further supported by a push towards sustainable packaging, aligning with a global shift to environmentally conscious

choices. Glass bottles are especially favourable for olive oil, ensuring protection against quality degrading factors like oxidation. This shift is reflective of a larger trend towards eco-friendliness and convenience, which resonates well with today's fast-paced consumer lifestyle."

Whilst healthier options are a purchase driver, many consumers remain somewhat unsure of the differences between cold-pressed, extra virgin, and blended oils (to name a few). Educating consumers is a highly effective way for stores and brands to engage with the shopper base,

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build relationships, and establish a relationship based on trust and communication.

“When it comes to choosing between extra virgin olive oil, and blends, there’s a tight balance consumers weigh between cost and health benefits,” explains Ferriera. “Extra virgin olive oil is lauded for its purity and higher concentration of health-supporting nutrients, but it is not within everyone’s budget, especially at the moment due to the international olive oil shortage.”

This shortage is due to extreme weather conditions adversely affecting European crops for the second year running. The Guardian (Sarah Butler, Sam Jones, and Helena Smith; 28 September 2023) reported that ...

“ Global production is expected to fall to 2.4 million tonnes according to the International Olive Council, less than last year’s harvest and well short of global demand of about 3 million tonnes, after drought and heatwaves of more than 40 degrees hit production in Spain. ”

The olive producing industries in Spain, Greece, Italy, Portugal, Turkey, and Morocco have all been affected. “This is where our canola and olive oil blends come into play,” says Ferreira.

“They offer a more cost-effective option while still delivering some of the health advantages associated with olive oil. It’s a practical choice for health- and budget-conscious consumers, with Canola being rich in Vitamin E & K, O and Omega 3.”

The good news for retailers and consumers is that South Africa’s olive oil industry is blossoming. “In South Africa, the emphasis on locally grown and sustainable produce is significant,” says Ferriera, “particularly as consumers increasingly value the traceability and environmental impact of their food choices. While this trend includes frozen produce, for olive oil, it underscores the premium quality and sustainability that South African olive oils offer. South African olive oils are recognised for their exceptional quality on international platforms, with many local producers committed to organic farming and sustainable practices. By choosing South African olive oil, consumers not only enjoy a product that rivals the best in the world, but also support a market that prioritises environmental stewardship and local economy.”

Image courtesy of Ron Lach, Pexels



Image courtesy of www.tigerbrands.com/

### Trends to watch across the board

#### Sustainability, recyclable and eco-friendly packaging options

Wilson’s Foods Frans Ferreira says, “With a strong push for eco-friendly options, producers are increasingly turning to recyclable and sustainable packaging solutions. This shift is about catering to the eco-conscious consumer who values sustainability from farm to kitchen. By adopting recyclable materials, such as locally produced glass bottles and recyclable boxes, every bit helps. South African brands can enhance their appeal and marketability while contributing positively to the environment.”

#### A culinary adventure

Across the FMCG industry, the demand for innovation and product development is growing. Consumers want more variety, more choice, and more excitement. Despite the demand for convenience, they also expect their food to be interesting.



Speaking from an olive oil perspective, Ferreira sees this sense of adventure continues to grow in consumers. He says, “The future of olive oil is as rich and diverse as the range of products on offer from South African producers. With consumers becoming more adventurous in their culinary exploits, the demand for a variety of flavours and high-quality oils is on the rise. Expect to see a continued influence of international flavours and fusion cuisines, with flavoured edible oils at the heart of innovation — whether that means oils infused with exotic herbs or balsamics that bring a world of taste to local tables.

“We have noticed an uptake on the Spicy Peri oil again, which we expect to continue into 2024, accompanied by a Coconut Flavoured oil we’re launching in this month. Consumers are more daring than ever with flavours, and to be honest, we love it!”

### Products for children

Products aimed specifically at children are a growing market, despite increasing limitations on marketing, as well as stringent labelling laws regarding nutritional contents and less desirable ingredients such as sugar, salt, and fats.

From interesting shapes and colours that are aesthetically appealing, to flavour combinations and ingredients that are suited to less mature palates, convenience foods are ripe for innovation with this target market in mind. Now more than ever before, children’s preferences are being taken into consideration when making purchase decisions.

### Chilled and frozen baby and toddler meals

This is a market that has expanded significantly over the last few years. Caregivers are looking for convenient meal options that are nutritious and tasty. From weaning stages onwards, shoppers expect high quality products that answer their needs. This includes an exciting and varied array of fresh and organic ingredients that will encourage adventurous eating as children get older, while also satisfying more sensitive palates.

Chilled products can offer immediate gratification – often a must when dealing with young children and therefore a go-to for caregivers, whereas a solid frozen range offers product longevity and at-home convenience. Keeping in mind the rise of food intolerances, especially amongst young children, retailers would be wise to stock products that cater for a wide variety of dietary restrictions. **SR**



Image courtesy of <https://drpraegers.com>



Image courtesy of <https://drpraegers.com>

### Sources:

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## Effective solutions to reduce the cost of in-store refrigeration

### Polyurethane Injected Panels

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## Cold & Freezer Rooms



### Floors – Fabricated and Concrete

#### Fabricated Floors

- The inside floor finish is 1.5mm Aluminium tread plate glued and screwed to a marine ply base.
- Galvanised plate options available in lieu of the Aluminium Chequer Plate finish.

#### Concrete Floor

- Concrete floors are used for flush or step-up entry and in permanent structures. Usually a recess of 150–170mm is used to accommodate the foam slab insulation and the concrete screed.



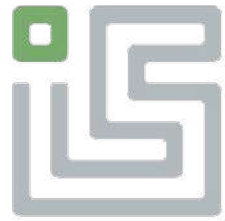
### Meat Rails

- Hot Dipped Galvanised system.
- Support structure integrated into insulated panels.
- Optional free-standing continuous galvanised system with bends and switch gear.

### Aluminium Chequer Plate

- Installed as an option to protect panels from scratches and light impact damage.
- 1.5mm and 2.0mm thick options.
- Standard height 1 250mm AFFL.





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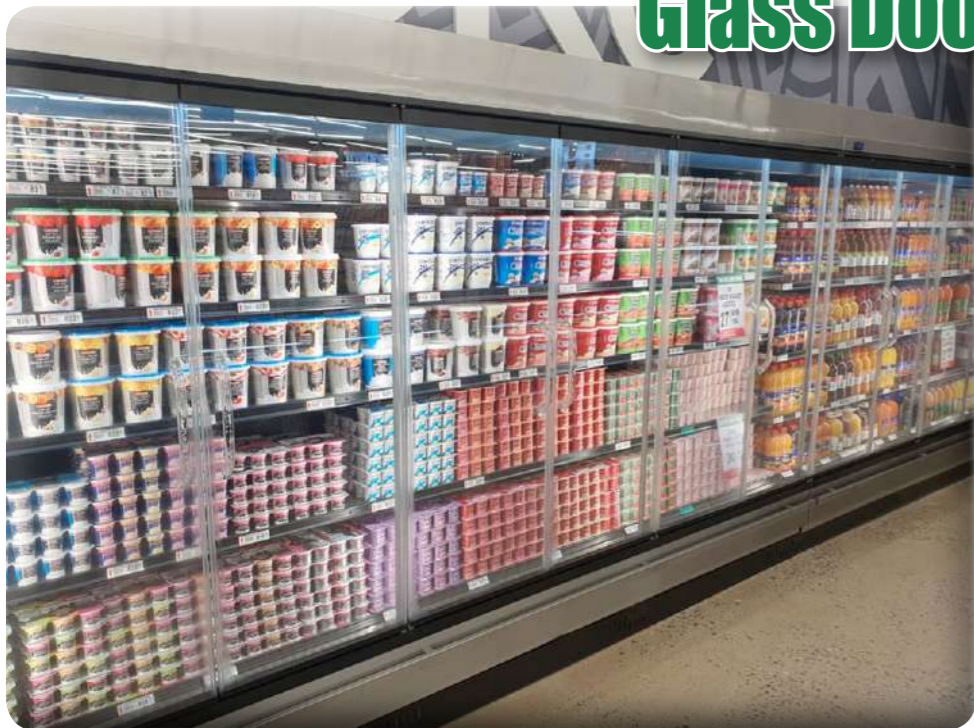


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## Airshield Glass Doors



## Ways to save

With energy cost rising and food retailers looking to improve the shopping experience environment for customers, Insulated Structures has developed an effective solution to reduce the cost of in-store refrigeration while enhancing the customer experience.

Insulated Structures doors are easy to retrofit on in-store cabinets to reduce the energy required to keep chilled foods at the correct temperature.

Meanwhile, customers are able to clearly see and access the products on offer. Reduced energy requirements means smaller refrigeration plant selection for new stores. These savings will off-set the initial cost of the doors. Up to 40% reduction in refrigeration requirement has been achieved.



Standard Airshield Glass Doors with a Black Frame.  
Heated Hybrid also available in this design.  
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