



TRENDS OF THE RETAIL SALES OF NINE DAIRY PRODUCTS AND EIGHT OTHER GENERALLY USED FOOD PRODUCTS BASED ON INFORMATION UP TO **SEPTEMBER 2025 OBTAINED FROM THE NIELSEN COMPANY**

(A report prepared for Milk SA)

This report was compiled by the Office of SAMPRO and forms part of the Industry Information Project of SAMPRO. 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 SAMPRO are designed and implemented in accordance with the Competition Act and independently from commercial interest of any and all the members of SAMPRO.

Introduction

1. In the report attention is given to trends of retail sales (quantity and average price) of eight 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

DAIRY PRODUCTS	OTHER FOOD PRODUCTS
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) Eight dairy products;
- (b) Eight other food products; 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 timely 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. “The Nielsen Company” 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 Nielsen surveys.

5. Although the surveys of ACNielsen Marketing and Media in respect of the products 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 ACNielsen Marketing and Media sample for 2019, is expressed as a percentage of the estimated total demand in the same period¹⁾.

Table 1: NIELSEN SAMPLE AS PERCENTAGE OF THE TOTAL DEMAND

PRODUCT	A NIELSEN SAMPLE	B ESTIMATED TOTAL DEMAND ¹⁾	A AS PERCENTAGE OF B
Pasteurised milk and ESL milk (Litre)	208 082 467	518 388 520	40.1
UHT and sterilised Milk (Litre)	531 725 742	994 276 763	53.5
Flavoured milk (Litre)	15 194 862	46 812 279	32.5
Yoghurt (Litre)	190 128 670	230 485 637	82.5
Maas (Litre)	224 355 931	271 661 720	82.6
Pre-Packaged cheese (Kg)	39 525 285	96 090 819	41.1
Cream cheese (Kg)	3 268 108	5 107 771	64.0
Butter (Kg)	9 622 664	24 798 407	38.8
Cream (Litre)	10 561 720	19 198 279	55.0

1. *Retail sales plus non-retail sales for the period January to December 2022.*

2. *Includes hard and semi-hard cheeses, pre-packaged and other.*

3. *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 estimate figures are based on BMI figures of 2012 and 2013 and inflated by the growth rates as shown by NielsenIQ.*

6. The performance of the dairy products concerned in the retail market, as measured by Nielsen, is set out in Tables 2 and 3.

TABLE 2:
CHANGES IN THE QUANTITIES OF RETAIL SALES OF SPECIFIC DAIRY PRODUCTS

PRODUCT	Sales in the month of September 2025 versus the sales in the month of September 2024	Sales in the 3 months from July 2025 to September 2025 versus the sales in the 3 months from July 2024 to September 2024	Sales in the 6 months from April 2025 to September 2025 versus the sales in the 6 months from April 2024 to September 2024	Sales in the 9 months from January 2025 to September 2025 versus the sales in the 9 months from January 2024 to September 2024	Sales in the 12 months from October 2024 to September 2025 versus the sales in the 12 months from October 2023 to September 2024
	percent	percent	percent	percent	percent
Fresh Milk	0.4	0.6	-0.2	-0.3	-0.6
UHT milk	4.4	4.6	4.4	4.9	5.2
Flavoured milk	8.4	6.3	1.5	1.6	1.4
Yoghurt	9.1	6.9	3.8	2.7	2.5
Maas	11.7	10.4	9.2	8.3	8.4
Pre-packaged cheese	4.2	0.8	1.2	1.8	2.7
Cream cheese	6.5	7.0	6.5	4.9	4.5
Cream	5.4	5.2	4.9	5.6	5.0

TABLE 3:**CHANGES IN THE AVERAGE RETAIL PRICES OF SPECIFIC DAIRY PRODUCTS**

PRODUCT	September 2025 versus August 2025 (1 month ago)	September 2025 versus June 2025 (3 months ago)	September 2025 versus March 2025 (6 months ago)	September 2025 versus December 2024 (9 months ago)	September 2025 versus September 2024 (12 months ago)	September 2025 versus March 2023 (18 months ago)	September 2025 versus September 2023 (24 months ago)
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
FRESH MILK	0.0	0.4	-0.2	-1.0	-1.2	-1.2	0.1
UHT MILK	-0.5	1.6	1.7	2.2	-0.3	1.5	-0.2
FLAVOURED MILK	-0.7	-0.6	1.2	6.2	3.1	7.8	7.6
YOGHURT	0.1	0.4	0.6	3.0	0.9	4.4	7.2
MAAS	0.05	-0.4	-1.1	-0.1	-1.5	0.2	1.2
PRE-PACKAGED CHEESE	-1.0	-1.6	-0.1	1.4	3.3	2.3	5.7
CREAM CHEESE	-2.5	-3.4	0.9	-2.4	2.0	4.8	5.9
CREAM	0.7	-0.6	0.4	0.4	0.5	2.0	4.4

OTHER FOOD PRODUCTS

7. The performance of the eight food products concerned in the retail market, as measured by Nielsen, is set out in Tables 4 to 5.

TABLE 4:

CHANGES IN THE QUANTITIES OF RETAIL SALES OF SPECIFIC FOOD PRODUCTS

PRODUCT	Sales in the month of September 2025 versus the sales in the month of September 2024	Sales in the 3 months from July 2025 to September 2025 versus the sales in the 3 months from July 2024 to September 2024	Sales in the 6 months from April 2025 to September 2025 versus the sales in the 6 months from April 2024 to September 2024	Sales in the 9 months from January 2025 to September 2025 versus the sales in the 9 months from January 2024 to September 2024	Sales in the 12 months from October 2024 to September 2025 versus the sales in the 12 months from October 2023 to September 2024
	percent	percent	percent	percent	percent
INSTANT CEREALS	6.8	5.7	13.2	3.5	3.3
BREAD	4.0	3.8	-14.2	1.6	1.5
RICE	13.0	13.3	-7.4	8.7	7.6
MAIZE MEAL	4.0	4.4	-17.7	-3.5	-3.8
MARGARINE	-0.7	-1.7	-16.4	-0.8	-0.1
TEA	-4.6	-1.2	-13.9	-0.8	-1.4
COFFEE	-3.9	0.2	-13.1	-0.6	-0.4
SHORT LIFE JUICE	8.6	4.9	-17.7	0.9	0.4

TABLE 5:**CHANGES IN THE AVERAGE RETAIL PRICES OF SPECIFIC FOOD PRODUCTS**

PRODUCT	September 2025 versus August 2025 (1 month ago)	September 2025 versus June 2025 (3 months ago)	September 2025 versus March 2025 (6 months ago)	September 2025 versus December 2024 (9 months ago)	September 2025 versus September 2024 (12 months ago)	September 2025 versus March 2023 (18 months ago)	September 2025 versus September 2023 (24 months ago)
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
INSTANT CEREALS	-0.6	3.1	-2.4	2.3	1.1	1.8	3.5
BREAD	-0.4	0.1	0.2	-0.4	0.3	4.7	5.0
RICE	-2.5	-7.4	-12.8	-15.6	-17.8	-17.0	-9.0
MAIZE MEAL	-0.5	-4.2	-11.3	-2.5	1.5	14.6	12.3
MARGARINE	-1.6	0.9	2.8	3.9	5.5	3.9	7.1
TEA	-0.1	2.1	-0.8	10.0	5.6	13.8	21.6
COFFEE	-0.6	5.1	-2.2	10.9	8.7	14.9	29.5
SHORT LIFE JUICE	-2.7	-1.3	3.0	8.3	1.9	9.1	12.5

Marietjie Le Roux
De Wet Jonker
Alwyn P Kraamwinkel

10 December 2025