

BMi Research's 2013 Annual Quantification Reports

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BMi Research (Pty)Ltd, is a research house specialising in consumer and industrial research in various sectors, including the retail market. It has more than 30 years' experience in the industry across a wide range of methodologies and markets. Below are 2013 Annual Quantification Reports on bars, mageu, Maize Meal and Wheat Bread in South Africa.

2013 Annual Quantification Report on Bars in South Africa

Product Definitions

Count Lines

These might contain wafer layers with fondant cream or praline, cereal, biscuit, fruit and/or nuts, caramel, butterscotch, cracknel, nougat, peanut butter and/or any combination of any of the above

Health Bars

Bars aimed at the fitness, weight conscious and medical sectors of the market. This will include seed bars, sugar free and diet bars containing muesli as main ingredient. These can be dipped or covered in chocolate or other sweet segments.

Sports Enhancement Bars

Energy enhancing bars concentrate specifically on sports, endurance and fitness enthusiasts.

Market Trends

Unlike the chocolate market, the bars market in South Africa saw good growth during 2012. The well-established count lines market saw the least growth of the three sub-categories, only gaining in volume terms, whilst sports enhancement bars received a good push from producers. Whilst this is good growth, it is less than that seen in 2011 and the growth rate for sports enhancement bars is expected to slow down over the coming years.

The channelling for the three categories remained largely unaffected during 2012, as producers and distributors continued to keep hold of their established markets. The general retail sector of health bars saw a push of volume during the base year, whilst general retail and wholesale chains in sports enhancement bars saw a significant push in volumes.

Count line regions saw little movement, as the market itself stayed steady and unmoving. The more affluent metropolitan regions such as Gauteng, KwaZulu-Natal and Western Cape saw focus on health bars, as their share of category volumes increased during 2012. All provinces saw substantial growth for the sports enhancement bars sector.

2013 Annual Quantification Report on Mageu in South Africa

Product Definitions

Mageu

Mageu, also called mahewu is a maize-based product and is available in both liquid (RTD) and powdered forms. The liquid product is a mix of maize meal, water and sugar, which has been cultured to form a non-alcoholic food-drink. Apart from

being a refreshing drink, Mageu is a staple for the working class citizen, often used to replace a meal at lunch, as a result of its reasonable price and high starch content.

Market Trends

Mageu volumes continue to grow. The market overall has seen many new smaller players come and go. This is a trend which has been seen for many years, as players come in with new ideas, but the larger players continue to hold the market.

The value for this market has seen a decrease. This was seen in many smaller players. This is due in the majority to the pricing of this category decreasing as competition between the larger players increases.

The majority of mageu is sold within the inland provinces, though KwaZulu-Natal holds a larger share.

Mageu is also seen greatly in the on-consumption area of sale and it is sold in bottom end retail, which holds the third highest share in the market. Mageu is consumed by the working class individual for the most part, and as such, is easier to purchase in larger quantities, or where pricing may be the lowest.

2013 Annual Quantification Report Maize Meal and Wheat Bread in South Africa

Product Definitions

Maize meal

Ground product made from the seeds of corn/ maize plants.

Wheat flour

Ground product made from the seeds of wheat.

Market Trends

Maize meal saw a large growth in 2012, one of the largest growths in the product's history. Final product pricing is always subject to influence from external factors, such as; petrol and labour costs, which was the case in 2011 when the pricing for wheat flour increased.

Production for wheat suffered due to weather conditions, resulting in more imports into the country, the overall consequence was an increase in pricing. The year 2012 saw pricing stabilise for both maize meal and wheat flour. With the increase in wages, prices are expected to make some shifts in the coming years.

Both markets saw stability in their regional splits, with the majority of distribution going to the larger, more populated provinces. Limpopo and Mpumalanga have a large share of distribution within the maize meal market.

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