

# BMi Research white milk report in South Africa

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Recent findings released by BMi Research reveal that the white milk industry in South Africa has undergone several shifts from a corporate point of view over the past year, as the milk suppliers to large retailers have changed. There has not been much change in overall volume however, with the total industry growing in 2014.



Reasons for the minimal changes include:

- Limited local milk supply as consumable milk comes under competition from other dairy-based products, such as flavoured milk and yoghurt.
- Increased exports as milk grows in surrounding countries. As the demand for milk increases in other African countries more locally produced milk is leaving South Africa than in previous years.
- UHT milk remains the largest milk category in South Africa. Sterilised milk, the smallest sector in South Africa, experienced the largest category growth in 2014, growing year on year, bearing in mind that this is calculated off a small base.

The market is under pressure continuously due to the use of milk as both a primary consumption product and a secondary product used within other dairy products.

The usage of milk in the industrial sector saw a decline in 2014. Retail experienced the largest increase in overall volumes as major players pushed and vied for the right to pack housebrand milk. Due to this added competition, suppliers pushed their own volumes as well in order to compete with the overall increase in products.

Smaller provinces, such as Limpopo and Mpumalanga, saw increases in the past year. Though these provinces are growing off smaller bases, it is a trend seen in many beverage and food industries, as players prioritise for previously neglected provinces in attempt to grow market share.

Carton and rigid plastic are the two most prominent pack types for the milk industry. Carton is popular for long-life products due to the specific technology utilised. This category is expected to continue growing faster than rigid plastic beyond 2015.

The milk market as a whole is expected to grow in 2015, more than that seen in 2014.

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