

# A Grain of Truth

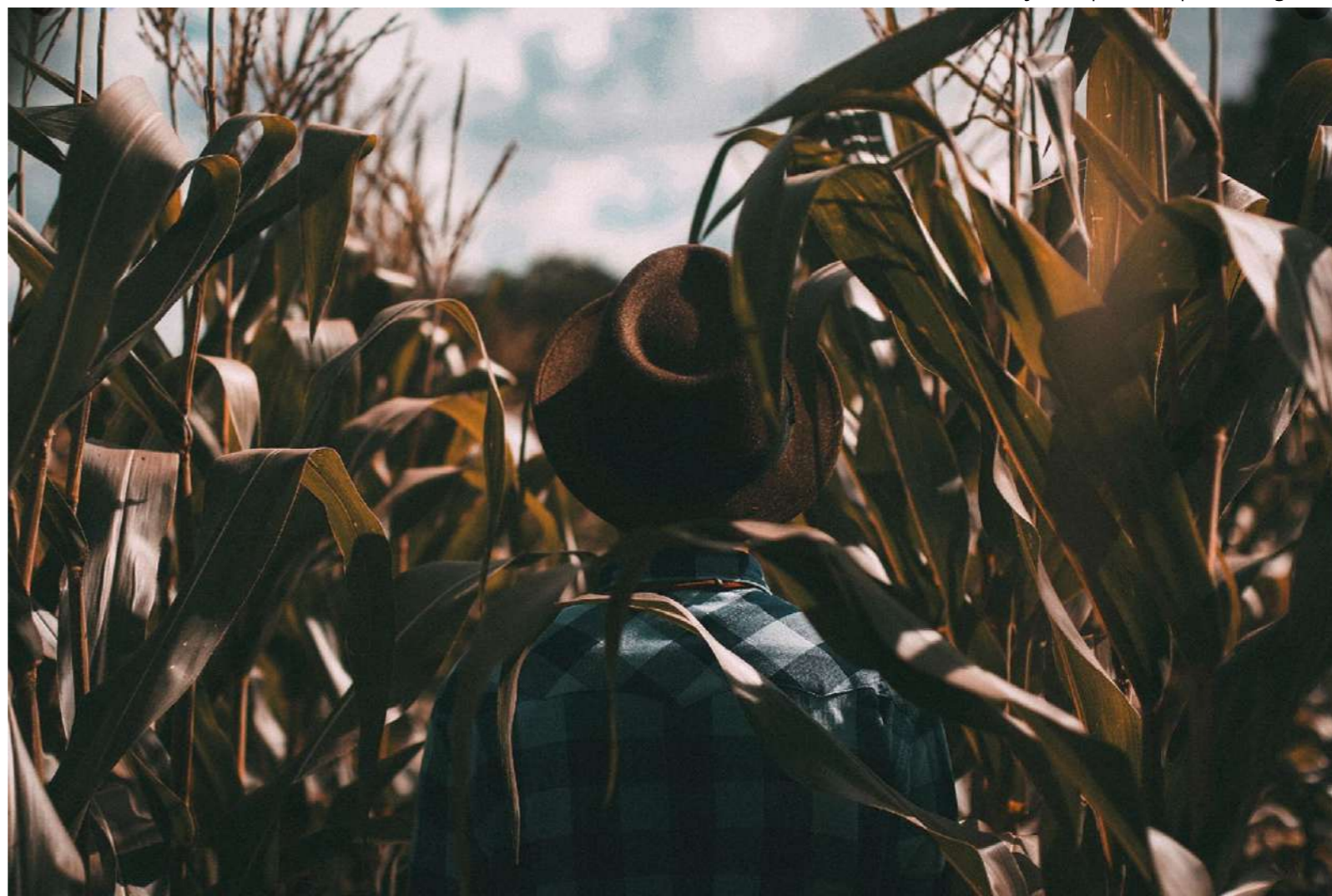
## Maize, rice, & wheat insights, Legumes & pulses

## Plus vegan & vegetarian trends

Grains and legumes have been part of the human diet for hundreds, even thousands, of years. In present times, families across the world and in South Africa still rely – moderately, heavily, and at times almost exclusively – on these staple commodities. While years of drought followed by unseasonably wet harvests, the strain of local electricity supply problems, the soaring cost of fuel, the ongoing war in the Ukraine, and supply and demand chains still reeling from the Covid-19 pandemic have all taken their toll, the grains and legumes categories remain robust.

Maize, wheat, rice, legumes and pulses provide the foundation for mealtimes for millions of South Africans, and with constant innovation and product development, the categories are constantly energised. Despite price increases, these products are still an affordable, value-for-money option – and are filling, nutritious and highly versatile. It's essential that suppliers, private label brands, retailers and manufacturers stay abreast and ahead of changing consumer demands and interests, as well as taking into consideration budget constraints and changes in shopping patterns.

Visuals courtesy of <https://www.pridemilling.co.za/>



### Pulses turn Meatless Mondays into a tasty feast:



### The current landscape of the agricultural sector

Mordor Intelligence's South African Grain Market Size and Share Analysis states,

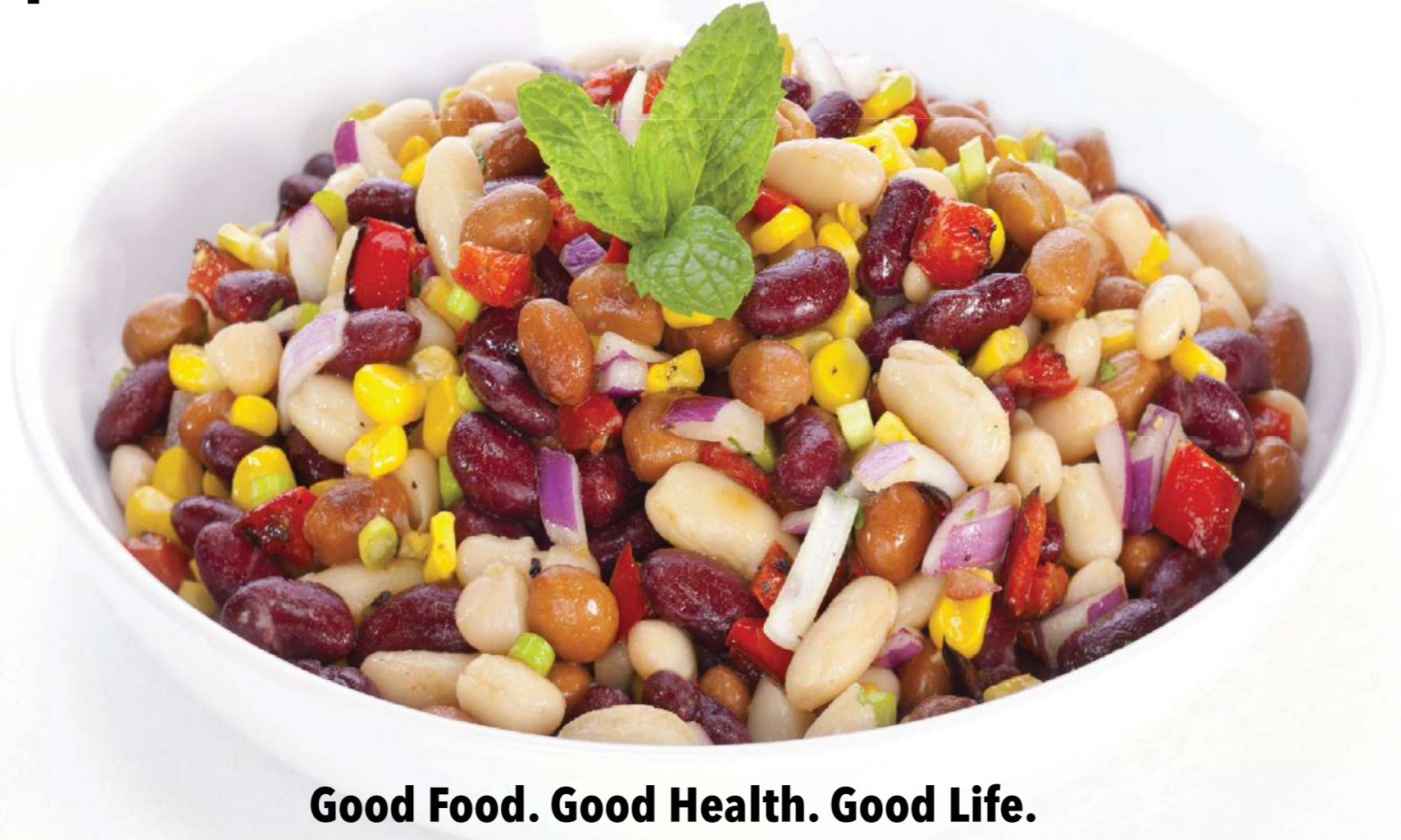
"The South Africa Grain Market size is expected to grow from USD 299 million ( $\pm$ R5 billion) in 2023 to USD 420 million ( $\pm$ R7.5 billion) by 2028, at a CAGR of 7% during the forecast period (2023–2028)."



# From Producer to the World™



## Responsible Food Production and Sourcing



Green split peas



Lentils



Beans



Chickpeas



Popcorn

**Good Food. Good Health. Good Life.**

011 762 5261 | [www.agtfoods.co.za](http://www.agtfoods.co.za) | [sales.za@agtfoods.co.za](mailto:sales.za@agtfoods.co.za)



**It's an affordable meal stretcher** (Prices based on December 2018)

	Mince	Pride Red Speckled Beans	Pride Lentils	Pride Split Peas (Green)
R/kg	R100,05	R35,98	R33,98	R27,98
Portion size	150g	130g (3/4 cup)		
R/portion	R15,08	R4,68	R4,42	R3,64

Grains are a significant contributor to the South African agricultural sector, with maize the most prominent grain field crop in the country. In 2020 the country produced 15 300 000 tons of maize. This increase in grain production has been attributed to changes in consumer behaviour – namely an increased demand for food security, the impact of the rising cost of basic foods, and a better understanding of the health benefits of grains.

According to Mordor Intelligence, “The growth in regional trade, technology, and mechanisation advancement in this sector are some of the factors driving the market’s growth in the country. Positive government policies along with trade policies

have impacted the grains market in South Africa.” Mordor also labels South Africa as the “most advanced, diverse, and productive in terms of agriculture in Africa.”

As one of the major exporters of corn in Africa (per Mordor Intelligence), South Africa remains at the forefront of technological advancements on the continent.

The Mordor report states, “According to the International Trade Centre Statistics, in 2020, the total exports of maize from the country were 2.5 million metric tons.” It adds, “Zimbabwe, the Republic of Korea, Botswana, and Taipei Chinese are some of the major importers of South African corn. While the country is a net exporter of maize, it heavily relies on other countries for its wheat consumption.”

South Africa depends on countries including Poland, the Russian Federation, Lithuania, and Germany for its wheat imports. The ongoing war, increasing political unrest, and strained political relations amongst participating countries have left trade agreements feeling the strain. Additionally, as Reuters reported on 20 July 2023, India “prohibited the export of non-basmati white rice with immediate effect.” This is mostly due to a feared shortfall after a late start to seasonal monsoon rains. At home, however, grain consumption is benefitting from innovative products and a dynamic market.



Visual courtesy of <https://www.farmersweekly.co.za/>



Visual courtesy of <https://supplant.me/>

## Agricultural technology's impact on the local agricultural sector

Local farmers are investing in agricultural machinery and agrochemicals in order to improve productivity and increase efficiency. Mordor Intelligence reports, “Digitalisation in agriculture, like the use of data tools, remote sensing, sensors, and drones, has already begun in South Africa, which helps in reducing the production cost while increasing productivity. SupPlant, the leading precision agriculture hardware-software solution, uses artificial intelligence and cloud-based technology to assist South African farmers with two goals: increasing crop yield, and reducing water usage.” In 2021 the South African government stated its intention to reduce reliance on imports and has highlighted the need to speed up the implementation of AgriTech to increase efficiency and productivity.

**Product launches and innovations drive the market**

While socio- and geo-political factors are impacting the market, product development and diversification remain strong, having long been staples of businesses looking to futureproof themselves and to stay relevant to consumers. Innovative flavours and brand extensions are creating interest in the traditional rice, maize and wheat categories and helping to keep these staple commodities contemporary and fresh.



Tastic's new range of air-popped rice chips is a case in point. The Tiger Brands collaborative effort has seen flavours such as Mrs H.S. Balls Chutney making an appearance in these exciting new offerings, while celebrity endorsement has been used to good effect in the advertising and social media campaigns driving these launches. Maximising the opportunities in convenience foods, Tastic also offers a range of flavoured rice pouches that include microwave instructions. Other brands offer a 90-seconds till cooked range of grains, acknowledging that for many South Africans, convenience is worth the cost.



# THE BEST TASTES

*Go back to the original taste*

## FROM THE WEST

# Wabona

SUPER MAIZE MEAL  
- TAU MILLS -

*Food for the family!*

Louis – 082 898 2057 | Jayson – 082 875 6145

Fortified and flavoured instant porridges have become another staple as an extension of traditional maize products, offering proven or promised health benefits and immune-boosting properties that are seeing increasing demand as consumers expect even more from their food.



New product launches in the past 12 months include RCL Foods' multi-grain instant porridge under the well-known Yum Yum brand, while Pioneer Foods, Tiger Brands and Premier FMCG are also playing heavily in this space, along with a host of smaller manufacturers.

Pepsico subsidiary Pioneer Foods' acquisition of the remaining half of Future Life in May 2023, eight years after buying its initial shareholding in the maker of nutrient-dense breakfast cereals and snacks ([www.news24.com/fin24/](http://www.news24.com/fin24/)) may well lead to other innovations in the already highly successful Future Life range.

Gluten-free grains including rice and sorghum are also making an appearance in everything from baby cereals to breakfast porridge, milled products for home baking, and even snacks, treats, and baked goods. Snacks, breakfast bars and biscuits are also benefitting from new flavours and brand extensions, as well as the addition of wholegrains, ancient grains, and naturally gluten-free grains.



Visual courtesy of <https://www.bakali.co.za/>

AGT Foods recognised the need to diversify their grain offering many years ago and today their 'online pantry' offers an impressive array of milled products for both home and commercial bakers. Their range of ingredient flours includes amaranth, barley, pea, chickpea, chia, brown teff, and quinoa. Ancient grains are becoming increasingly present in a wide range of products.





# YOUR BRAND IN HAND

**online. in store. on shelf.**

Delivering successful marketing and activation solutions to the consumer, trade & retail sectors **SINCE 1999.**

**FOR FREE EXPERT ADVICE VISIT:**

**[leegra.co.za](http://leegra.co.za)**



Image: <https://www.instagram.com/eatreal/>



**Lentils and legumes, beans and pulses**

Lentils are a popular choice for ready-packed soup mixes, but recent product innovations have also seen the

introduction of lentil and legume-based snacks such as chips, crackers, and more. HMR, ready to eat, and deli offerings are also seeing more lentil, legume, and grain-based offerings. Consumers are gaining an increased understanding of the health benefits of these foods, and, most importantly, there is ample product and recipe development in this space for nutritious food that looks and tastes appealing, appetizing, and delicious.

Local manufacturers of grain-related products Pride Milling are a firm advocate of beans and pulses.



Visual courtesy of <https://www.pridemilling.co.za/>

In a blog for their website they write, "Beans and legumes have long been a forgotten pantry staple – ever-present but never eaten. Luckily, with a new focus on meatless meals and digestive health, they have made a triumphant return." Offering a wide variety of dried and milled products – both grains and pulses or legumes – Pride Milling highlights the many benefits of adding pulses and beans to any diet. They credit the rise in demand for these products to the consumer's desire to improve their eating habits, while providing a value-for-money alternative to meat products.

Promoting legume and pulses consumption, global food awareness organisation ProVeg International has joined forces with Google, the Bezos Earth Fund, the United Nations Foundation, the Kraft Heinz Company, and more than 40 other

organisations to campaign for a doubling of global bean, pea, pulse, lentil and legume consumption by 2028. This campaign, called Beans is How, aims to promote the value of incorporating beans into meals, as part of a strategy to remove greenhouse gas emissions from the food system.

ProVeg International states that beans release 90% less harmful greenhouse gases than some animal-based foods, while containing protein, carbohydrates, vitamins, and minerals. "Beans really do tick all the boxes when it comes to providing nutritious, affordable and climate-friendly meals for countries all over the world," says Jasmijn de Boo, CEO of ProVeg. De Boo adds, "We urgently need to scale up efforts to encourage greater consumption of beans over animal-based foods if we are to have a chance to slow climate change and prevent ecosystem collapse."



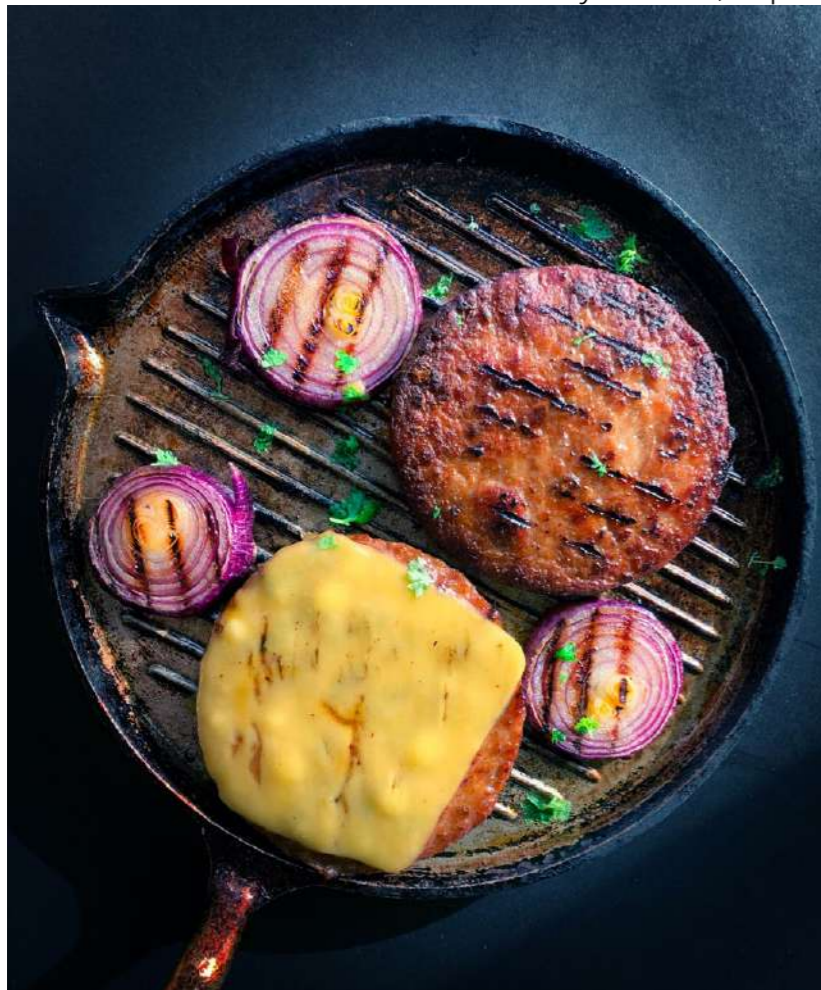
Visual courtesy of <https://beansishow.org/>

Beans is How is aimed at encouraging people to eat more beans by publishing tasty recipes that show consumers how to grow beans themselves. Through a 'menu challenge' the campaign encourages restaurants, caterers, cafes, schools, and other food providers to include #beansonthemenu. In-store and social media promotions are a great way to incorporate international campaigns such as this, while also helping to drive local consumption and educate consumers.

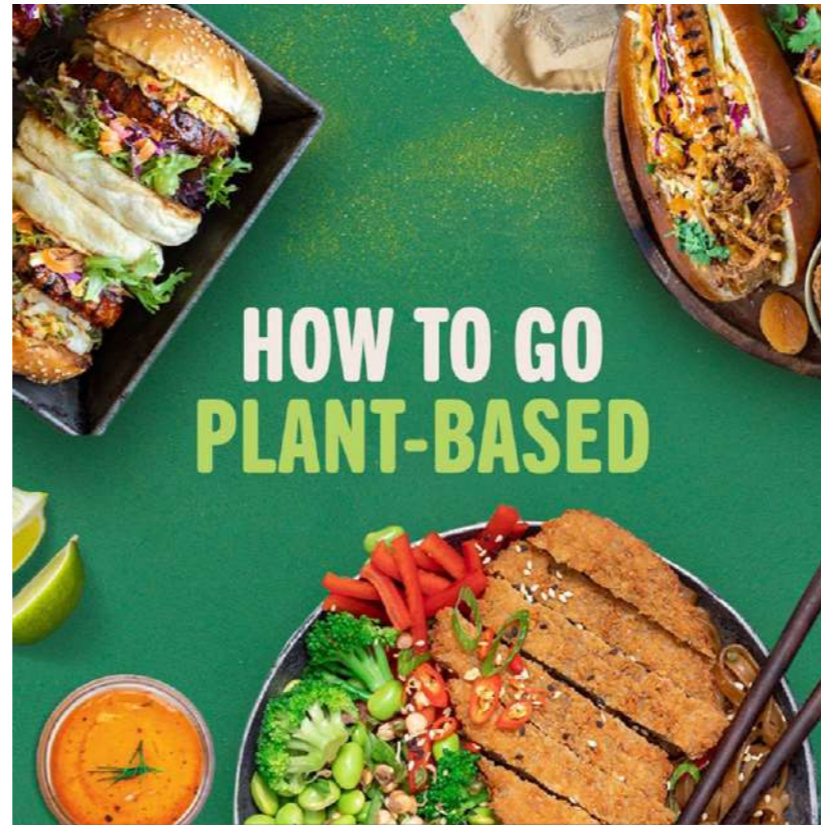
**Vegetarian and vegan trends**

As consumers strive to make healthier, more sustainable choices, so their dietary needs are changing. 'Alternative' plant-based or meatless meals are becoming more popular – even in notoriously carnivorous South Africa (why else would there be a legal battle over what to call a meat-alternative patty?) As the demand for plant-based dishes increases, so the call for pulses, legumes, and other non-meat staples grows. Flexitarian eating – with reduced but not entirely excluded meat consumption – is also a driving factor here. The impact on this category is beginning to show.

Visual courtesy of likemeat, Unsplash



Visual courtesy of <https://fryfamilyfood.com/>



A look at local retailer shelves shows the extent of the growth in the vegetarian and vegan market. Product launches are coming thick and fast, with everything from plant-based ready meals to burger patty, mince, and meatball replacements, scrambled tofu, and even plant-based paneer, tinned soups, and deli offerings. Soya, tempeh, and seitan-based products join an abundance of ancient grain and legumes that are now available for consumers looking to reduce their meat consumption or replace it entirely.

Convenience is a big factor in driving product innovation, as vegan and vegetarian meals traditionally suffer from implied constraints such as skill, time, and availability of ingredients. By providing these ingredients, making preparation easier, and offering plant-based and vegetarian

ready meals and heat and eat options, manufacturers and retailers are placing these alternatives firmly within the reach of consumers.



Visual courtesy of <https://fryfamilyfood.com/>

**The label wars**

In 2022 the Department of Agriculture, Land Reform and Rural Development (DALRRD) took a decision against meat-based descriptors being used on plant-based alternatives and threatened to seize all products bearing these labels. This move had a devastating effect on the market, with News24 reporting that "Beyond Meat cancelled shipments to South Africa out of fear that its plant-based meat substitute products may be seized". Local restaurant group Spur, which served Beyond Burger at its restaurants, was forced to find a soya alternative. Retailers were also quick to clear





their shelves, leaving many shoppers frustrated and confused, although many completed their rebranding in record time.

The South African High Court issued a temporary reprieve, yet internationally there seems to be a battle brewing between meat manufacturers and suppliers of plant-based alternatives. A lack of clarity regarding the regulations and terminology for labels on alternative protein products is causing confusion about food labels worldwide and has already led to several court cases. Interestingly, a Swiss court recently sided with plant-based producers, a blow to pro-meat entities arguing that the use of “meaty” terminology is confusing.

Online-based Plant Based News says, “Vegan meat substitutes have seen a staggering rise in popularity over the last few years. Globally, total

consumption grew from 133 million kilograms in 2013 to 470 million kilograms in 2020. Many meat producers maintain that labelling these products with ‘meat’ terms is confusing for consumers. But plant-based brands state the opposite. South African manufacturer of plant-based meat alternatives Fry’s marketing director Tammy Fry said earlier this year: ‘Our product descriptions play an important role in helping our consumers understand how to use our products.’”

In another development, The Veg Economist reports that On The Green Side, a South African plant-based meat producer focused on clean-label chicken alternatives, is ready to enter the local market. “The company describes itself as a ‘modern chicken farmer’, aiming to directly compete with conventional chicken. Its products are made from

a range of proteins, including soy, wheat gluten, faba bean, lentil, chickpea, and pea. Proprietary high moisture extrusion technology is used to give the plant-based chicken an authentically meat-like texture.”

The Veg Economist adds, “On The Green Side already manufacturers for several major South African retailers, through both its own brand and private labels. The products are also available for food service, and the company is in the process of closing deals with global food manufacturers. Sales forecasts for 2023 predict a 50/50 split between local and global markets, changing to 10/90 within two to three years.”

Their flagship product – Flame Grilled Tenders in Original, Smoky BBQ, and Moroccan flavours – are marketed as versatile and affordable.

It’s clear that vegan and vegetarian offerings are increasing and judging by the innovative and ever-increasing new product launches, consumers agree. Retailers and wholesalers would do well to look at increasing and improving their offerings in this category and investing in some serious research and development when it comes to Own Brand vegan and vegetarian products. **SR**

#### Sources:

<https://www.mordorintelligence.com/>  
<https://www.news24.com/fin24/companies/pepsicos-pioneer>  
[www.reuters.com](http://www.reuters.com)  
<https://agtfoods.co.za/>  
[www.pridemilling.co.za](http://www.pridemilling.co.za)  
[www.news24.com/fin24](http://www.news24.com/fin24)  
<https://plantbasednews.org/>  
<https://vegconomist.com/>



## Mercury EK-2100

# Built to Fit In and Get Down to Business

The Mercury EK-2100 Series is a 21.5" interactive kiosk with a stylish, compact, and functional design that helps retailers implement contactless, safe, efficient, and reliable service to the customers.



NFC/RFID Reader



Fingerprint Sensor



2D Scanner



Status Indicator



EMV Supportive\*



Power Safety

\*Posiflex does not sell the EMV payment devices, but can provide bracket support with an additional charge

## Ingenious Design

With the choice of floor-standing or countertop, the Mercury EK-2100 Series ensures flexibility to meet the needs in any retail setting.

## Easy Serviceability

Engineered for easy assembly and maintenance, Mercury EK-2100 Series lets retailers assemble and switch out components easily.

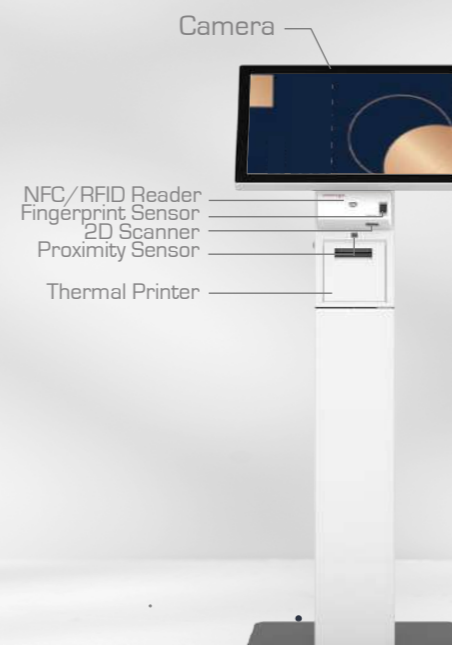
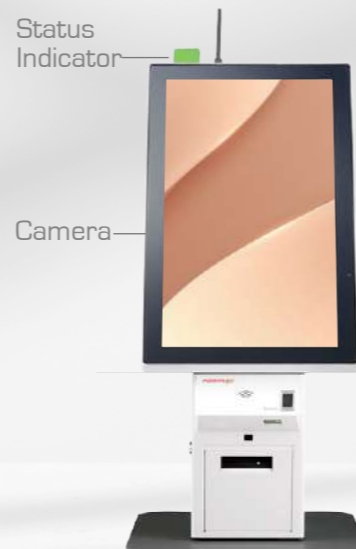
## Seamless Integration

Mercury EK-2100 Series offers a flexible solution with a variety of choices of peripherals including a Fingerprint sensor, an NFC/RFID reader, a 2D scanner, and a bracket for EMV payment devices.

# PRODUCT SHOWCASE



COUNTERTOP



FLOOR-STANDING