

The engine rooms of South African retail

Back-of-house

Behind every successful supermarket lies a bustling back-of-house operation that customers rarely see but absolutely depend on. From the early morning hum of bakery ovens to the precise choreography of the butchery department, these behind-the-scenes areas form the beating heart of retail operations across South Africa.

Back-of-house operations are about more than efficiency – they're about creating the foundation for exceptional customer experiences; from the perfectly proofed artisanal bread to the precisely cut steaks, every aspect of the customer's experience begins in the back-of-house.

It has evolved dramatically in recent years, driven by changing consumer demands and technological advances. As South African consumers increasingly choose premium products, they create new pressures on retailers to elevate their offerings while maintaining operational efficiency.

The new reality of South African retail operations

According to 6Wresearch, the South African food and grocery retail market is expected to grow at a significant CAGR (Compound Annual Growth Rate) of 5.3% during the forecast period 2025-2031, with this growth placing new demands on back-of-house operations.

The retail sector is experiencing significant consolidation, with selected retailers implementing store closures and conversions as part of their restructuring strategy, while other major retailers are strengthening their market positions through operational excellence in back-of-house functions.

South Africa's unequal economy means that retailers grapple with multiple challenges simultaneously. On one end, there has been an uptake of premium products and premium-priced convenience-focused shopping, which has altered how retailers approach their prep areas, storage systems and service departments to provide middle- and higher-income consumers with the quality and convenience they expect.

On the other end, food prices continue to top the list of consumer concerns. "As one of the most unequal societies in the world, we need to make better use of our food resources," said Vinesh Maharaj, PwC South Africa Smart Manufacturing Leader.

"With half of food loss and waste occurring during the manufacturing process, it is imperative that food producers apply modern techniques to better plan their operations in order to minimise wastage. Modern technologies allow for better demand forecasts, production planning and input sourcing, thereby reducing surplus inputs and outputs at the factory level and the ultimate waste of food products."

This reality has made efficient back-of-house operations not just desirable but essential for survival in a highly competitive marketplace.



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their extensive networks as one of South Africa's dominant retail operations.

Vulcan Catering and Bakery Equipment, with 70 years of experience in the South African market, has observed that the most successful installations prioritise flexibility and scalability to accommodate varying store sizes and operational requirements.

Revolutionising back-of-house design and layout

The traditional approach to back-of-house design – cramped prep areas tucked away as afterthoughts – is rapidly becoming obsolete. Modern retailers are embracing open-concept designs that promote workflow efficiency and cross-departmental collaboration. Leading South African equipment suppliers such as Boss Catering Equipment and Foodserve are responding with modular solutions that can adapt to changing needs.

The key to successful back-of-house design lies in understanding traffic patterns and peak operation times. Bakeries, for instance, require early morning access routes that don't interfere with general prep areas, while butcheries need direct cold storage access and efficient waste management systems.

The scale of operations varies dramatically across retailers, with major chains requiring highly sophisticated back-of-house systems to manage

Smart storage solutions and cold chain management

Walk-in coolers and freezers have become the backbone of modern retail operations, and they're no longer only about keeping products cold. Advanced refrigeration systems now incorporate smart monitoring, energy-efficiency features and modular designs that can expand with business growth.

The integration of IoT sensors allows managers to monitor temperatures, humidity levels and energy consumption in real-time, preventing costly product losses and ensuring compliance with food safety regulations.

Shelving and racking systems have evolved beyond simple storage solutions to become integral parts of inventory management systems. Modern installations incorporate barcode scanning capabilities, automated stock rotation systems and visual management tools that help staff maintain optimal stock levels while minimising waste.

Speciality departments: where innovation meets tradition



Bakery. The bakery department represents perhaps the most dramatic transformation in back-of-house operations.

Traditional bread making has given way to sophisticated operations that can produce artisanal breads, pastries, and ready-to-eat items throughout the day. Modern deck ovens, convection systems and automated dough mixers from suppliers such as Caterwize enable consistent quality and reduce labour costs.

Automated proofers and temperature-controlled rising chambers have revolutionised production scheduling. Retailers can now programme their equipment to have fresh bread ready for peak shopping periods, while overnight operations can focus on preparing items for the following day's sales cycles.

While the technology approach keeps in-store bakeries highly efficient, the outputs still need to woo and charm customers. This can be clearly seen at the new Woolworths Food Emporium in Durbanville, Western Cape, where the bakery and patisserie are "a jewel in the crown with delicious and impressive pastries that would not be out of place in a Parisian café – complete with bespoke boxes, perfect for gifting. Sourdough and artisanal loaves are part of the new range of freshly baked speciality breads," says Woolworths.



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Butchery and deli. The butchery department has seen significant technological advancement with the introduction of precision band saws, automated meat mincers and vacuum packaging systems, while all-inclusive butchery solutions such as those from Soft-Ice Catering Equipment combine traditional craftsmanship with modern efficiency.

These departments [butchery and deli] increasingly focus on value-added services such as custom cuts, marinated products and ready-to-cook meal components. The integration of precision scales with labelling systems ensures accurate pricing while maintaining traceability requirements.

Home Meal Replacement (HMR) & prepared foods.

The HMR category has exploded in popularity, driven by time-pressed consumers seeking convenient meal solutions.

One of Pick n Pay's flagship stores, The Falls in Johannesburg, exemplifies this trend, featuring an extensive selection of fresh products with a large deli, bakery and butchery focused on providing a premium shopping experience. This growth has created entirely new back-of-house requirements that include blast chillers, sous vide* equipment and sophisticated packaging systems that maintain food quality and safety.

Modern HMR operations rely heavily on batch-cooking techniques and careful temperature management throughout the preparation and storage process. The investment in proper equipment pays dividends through reduced waste, improved food safety and the ability to offer a wider variety of products.

* A method of cooking food, especially meat or fish, by vacuum-sealing and immersing in warm water.



Industry benchmarks and performance metrics

The competitive dynamics in South Africa's retail sector have created clear performance benchmarks that back-of-house operations must meet. Industry analysis suggests that successful retailers maintain specific operational standards: waste levels below 2.5% for fresh produce, equipment uptime exceeding 95% and food safety compliance scores above 98%. These metrics directly correlate with profitability and customer satisfaction scores.

However, operational efficiency and back-of-house excellence also play crucial roles in determining competitive positioning.

InfoChef Free State 2025 was hosted at the Central University of Technology, School of Hospitality. This event brought together culinary creativity, innovation and passion – all under one roof. It showcased the future of hospitality and catering and the amazing talent in the Free State. From delicious dishes to dynamic presentations, InfoChef was truly a feast for all the senses!

Photo & caption: <https://vulcan.co.za/>

Technology and automation: The future is now

The integration of technology into back-of-house operations has accelerated dramatically. Advanced systems now offer features that were unimaginable just a few years ago. Smart weighing technologies, such as those showcased by Microsep's Mettler Toledo systems can automatically adjust for product variations and integrate directly with inventory management systems.

According to information from the Montgomery Group, which hosts the ProPak Africa exhibition each year, the Ishida QX-500 tray sealer highlighted in recent industry exhibitions, delivers remarkable efficiency improvements: a 66% increase in cycle speed, 44% reduction in weight, 46% reduction in size and 50% reduction in energy consumption. These improvements directly translate to reduced operational costs and improved productivity.

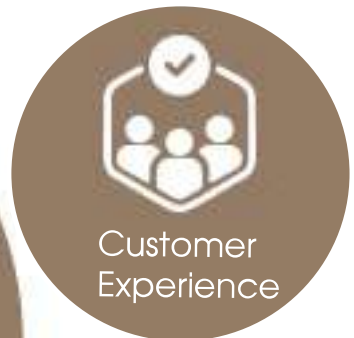
Artificial intelligence is making its mark through systems such as Ishida's Sentinel 5.0 remote production monitoring system, which allows manufacturers to track and analyse real-time data across entire production lines. This technology enables predictive maintenance; it reduces downtime and optimises production schedules based on actual demand patterns.



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Where back of house becomes front of house

Woolworths Food Emporium officially launched at The Village Square in Durbanville in the Western Cape at the beginning of July 2025, “ushering in the new gold standard for premium food retail,” says Woolworths Holdings. The reimagined Food Emporium opened its doors to reveal innovative layouts, modern design and customer-led convenience. Group CEO, Roy Bagattini says ...



Roy Bagattini

“This new Food Emporium is a real step change for us. It embodies what Woolies stands for – quality without compromise, innovation with purpose, and the conviction that doing things right is always worth it.”

“Durbanville isn’t just another Woolies flagship. It’s a clear signal of our intent – we’re not standing still. We are here to affirm our leadership in food retailing – doing so with heart, being bold, raising the bar, and redefining the future of food shopping in a way that truly reflects who we are, and what we believe in.”

The store signals Woolworths’ intention to redefine grocery shopping in South Africa and deliver a best-in-class experience for its customers. A revamped premium food counter, called Our Kitchen, serves all the favourites, with rotisserie chicken being among the most popular. There is also a new sushi bar, and the innovation kitchen



that features live cooking demonstrations where samples will be served and ingredients can be shopped on the spot.

The store also features a fishmonger with an expanded seafood selection, with filleting and preparation services. Meanwhile the new butcher counter has a broader range, with an in-house butcher on hand to offer expert advice on preparing various cuts of meat.

The store also features a delectable bakery, pantry experience with international cuisines, a confectionery alcove and a wine alcove with local and international wines.

“Nothing in the new Woolworths Food Emporium is by chance,” says Sam Ngumeni, CEO of Woolworths Foods. “Every decision and every detail has been shaped by a single focus – to deliver a specta-



Photos: www.linkedin.com/posts/mariska-van-wyk

www.businesslive.co.za/



Sam Ngumeni

cular customer experience. In reimagining our store, we placed our customer at the centre of every decision. From design to product selection, the store reflects our ambition to offer an inspiring, seamless and sustainable food shopping experience, one that’s proudly local and forward-thinking.”

“The store is led by passionate Woolies staff and specialists, all of whom are committed to supporting and connecting with customers during their every visit, making each trip to The Village Square not just satisfying, but joyful. We’re constantly asking how we can better serve our customers, and our new store sets a strong benchmark for what this future looks like.”



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Health and hygiene

Food safety regulations have become increasingly stringent, and back-of-house operations must comply with HACCP (Hazard Analysis Critical Control Points) protocols.

In line with this, modern equipment incorporates features that make compliance easier, such as automated cleaning cycles, temperature logging and materials that resist bacterial growth.

The Covid pandemic heightened awareness of hygiene protocols, which led to increased investment in hands-free equipment, improved ventilation systems and contactless monitoring solutions. These improvements both protect staff and customers and reduce the risk of production shut-downs because of contamination concerns.

Boosted sustainability

The push for greater sustainability has also become a defining characteristic of modern retail operations, with back-of-house areas playing a crucial role in achieving environmental goals. This is not limited to systems and processes. According to African Star Pac, a leading supplier of sustainable polystyrene foam trays and fast-food packaging, PVC film is widely used for food packaging because it adheres to surfaces and features high gas permeability, making it ideal for storing fresh food sustainably.

A company spokesperson explained: "At African Star Pac we use the cast process of manufacturing PVC food-grade film for additional strength and durability, which means you only need to wrap



<https://stockcake.com/i/bioluminescent-waste-portal>

your product once and not twice, minimising usage and reducing environmental impact."

This commitment to sustainability extends beyond corporate responsibility to practical operational benefits. Energy-efficient equipment reduces operating costs, waste reduction systems improve profitability and sustainable practices enhance brand reputation.

Initiatives such as Woolworths' 15-year partnership with WWF South Africa have pioneered sustainability in retail and are demonstrating how environmental responsibility can drive operational excellence.

"For us, the ambition is not only to change and improve how we do things, but also how our broader industry operates into the future," said Roy Bagattini, group CEO Woolworths Holdings Ltd. "Together, we have spearheaded advancements in sustainable farming and seafood sourcing, water stewardship, alien plant clearing, on-pack recycling labelling and various other initiatives, leaving an indelible mark on the landscape of responsible business practice."

The focus on sustainability has created new requirements for back-of-house operations. Modern installations must incorporate energy-monitoring systems, waste-tracking technologies and equipment that meets increasingly stringent environmental standards. These requirements are essential components of competitive retail operations – and no longer just optional additions.

Sustainable packaging and labelling solutions

Building on broader sustainability initiatives, the push towards sustainable packaging has transformed packaging and labelling operations. Retailers are investing in systems that can handle biodegradable materials, recyclable packaging and reduced-plastic alternatives without compromising product protection or shelf life.

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Trends in packaging design:



Zibo Containers' new Econo Meat Tray vacuum skin range, for example, extends fresh meat shelf life by more than 20 days while using environmentally responsible materials. This type of innovation allows retailers to reduce waste while meeting consumer demands for sustainable practices.

Labelling systems now incorporate QR codes and digital tracking capabilities that enable consumers to trace products back to their origins. This traceability is becoming increasingly important for premium products and organic ranges, where provenance adds significant value.

The South African retail landscape has demonstrated that operational excellence in back-of-house functions directly translates to competitive advantage. Successful retailers have recognised that back of house forms part of the profit generating capability of each department, be it butchery, bakery, deli, HR, fishmonger, or general groceries, driving pricing, reducing waste and contributing to customer loyalty. This understanding has driven

significant capital investment in modern equipment, technology systems and staff training programmes.

The consolidation of the retail market has intensified competition, making operational efficiency even more critical. Retailers that have invested in sophisticated back-of-house operations are better positioned to weather economic pressures and maintain market share, while those with outdated systems face increasing challenges to remain competitive.

Looking forward: Energy costs, the human element – and beyond

With energy costs representing a significant portion of back-of-house operational expenses, efficiency improvements have become crucial for profitability. Modern equipment focuses heavily on energy savings through improved insulation, variable-speed motors and smart control systems that optimise energy use based on actual demand.

The investment in energy-efficient equipment often pays for itself through reduced utility costs and improved operational reliability. Many equipment suppliers are offering energy auditing services to help retailers identify the most impactful upgrades for their specific operations. Yet despite increasing automation, skilled staff remain crucial to successful back-of-house operations. The complexity of modern equipment requires ongoing training and development, and leading retailers are investing in comprehensive training systems that combine hands-on experience with digital learning platforms.

The shortage of skilled workers in the food service industry is making retention programmes increasingly important. Retailers are discovering that investment in proper equipment and training improves operational efficiency, increases job satisfaction and reduces staff turnover.



Looking ahead, the future of back-of-house operations will be shaped by several key trends. Artificial intelligence and machine learning will enable more sophisticated demand forecasting and inventory management. Robotics will handle repetitive tasks, freeing staff to focus on quality control and customer service.

Sustainability will become even more critical, with retailers seeking equipment and processes that minimise environmental impact while maintaining efficiency. The integration of renewable energy sources and waste reduction systems will become standard features rather than optional upgrades.

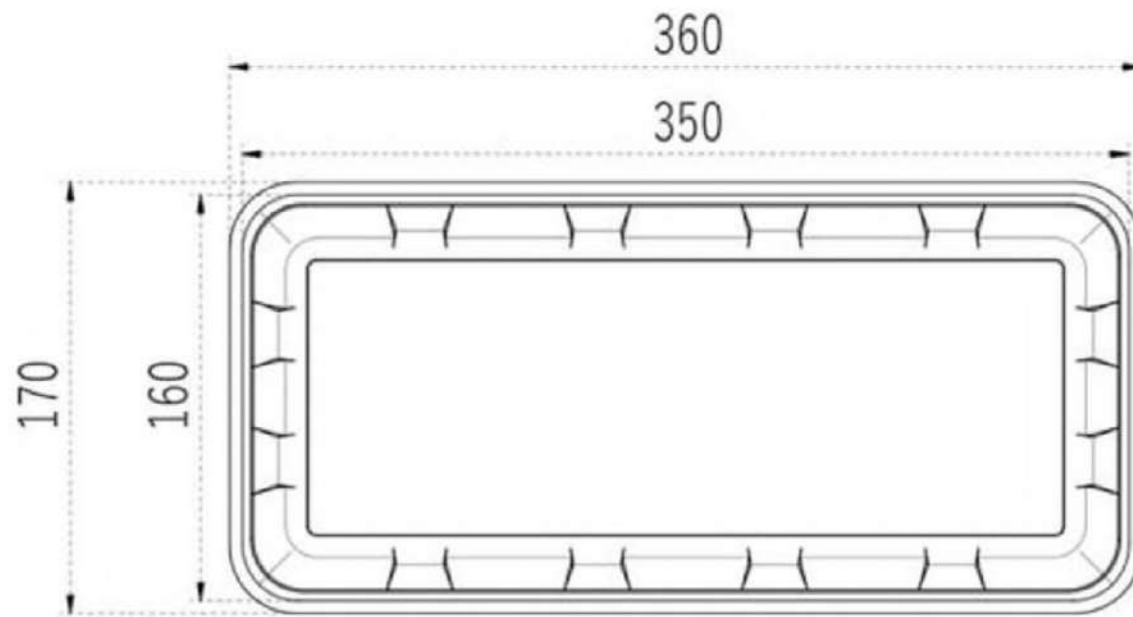
The growth of online ordering and delivery services will require back-of-house operations to adapt to these new models. This may include dedicated preparation areas for online orders, specialised packaging systems, and modified storage solutions that can accommodate different distribution channels.

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Back-of-house = the engine room

The back-of-house operation truly represents the engine room of retail success. As South African retailers navigate changing consumer demands, economic pressures and technological advances, those who invest wisely in their behind-the-scenes operations will be best positioned for long-term success. By embracing modern technology, prioritising staff development and maintaining unwavering focus on food safety and quality, retailers will find that their back-of-house investments pay dividends through improved customer satisfaction, reduced operational costs and enhanced competitive positioning.

In an increasingly challenging retail environment, excellence in back-of-house operations isn't just an advantage – it's essential for survival and growth. The future belongs to retailers who recognise that their back-of-house operations are not hidden support functions but the very heart of their business success. **SR**

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