



SOUTH AFRICAN SAUCES INDUSTRY LANDSCAPE REPORT

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COMPANY OVERVIEW



Insight Survey is a South African, boutique market research agency with more than 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

We believe in the advantage market research gives business leaders to fully understand their industry, facilitate business strategy, improve company performance, and drive company growth.

INDUSTRY & COMPETITOR INTELLIGENCE

Our bespoke Industry and Market Intelligence can help give the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision. From strategic overviews of your business's competitive environment through to specific competitor profiles, our customised Intelligence is designed to meet your unique needs.



QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



OUR RESEARCH SOLUTIONS



Competitor pricing research



Store visits and store checks



Competitor interviews



Customer interviews



Company website analysis



Governmental held records

OUR FOOD AND BEVERAGE EXPERIENCE

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



REPORT OVERVIEW

The **South African Sauces Landscape Report (173 pages)** provides a dynamic synthesis of industry research, examining the local and global **Sauces industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges, Sauces retail and competitor analysis, latest marketing and advertising news, pricing and promotion analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Sauces Industry Section:

- What are the current market dynamics of the Global Sauces industry?
- Which are the key markets within the Global Sauces industry?
- What are the latest Global Sauces industry trends, innovation and technology, drivers, and challenges?

For the South African Sauces Industry Section:

- What are the current market dynamics (market size and market value): 2019-2024 Actual, 2025-2029 Forecasts and distribution channels?
- What are the latest South African Sauces industry trends, innovation and technology, drivers, and challenges?

For the South African Sauces Manufacturer & Distributor Section:

- Which are the key manufacturing and distribution players in the South African Sauces industry?
- For each key player, what is the latest company news in terms of products, services, new launches, and marketing initiatives?
- Which popular Sauces brands and products do the respective companies manufacture/distribute?

For the South African Sauces Retail and Pricing Analysis Section:

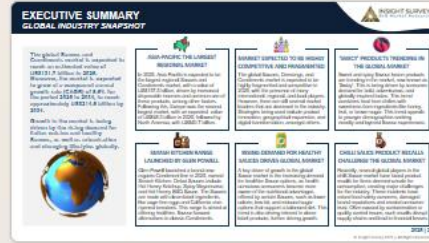
- Which are the house brands and products among key retail players (supermarkets) in the South African Sauces industry?
- What are the prices of popular Sauces (Barbeque Sauce, Chilli Sauce, Ketchup, Liquid Recipe Sauce, Mayonnaise, Mustard Sauce, Oyster Sauce, Pasta Sauce, Salad Dressing, Soy Sauce, Other Sauce) across South African retail outlets?
- What are the prices and recent promotions of popular Sauces?

SCREENSHOTS FROM REPORT

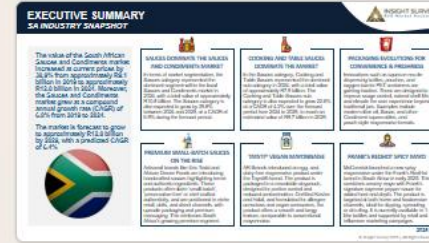
173-page report filled with detailed charts, graphs, and insights



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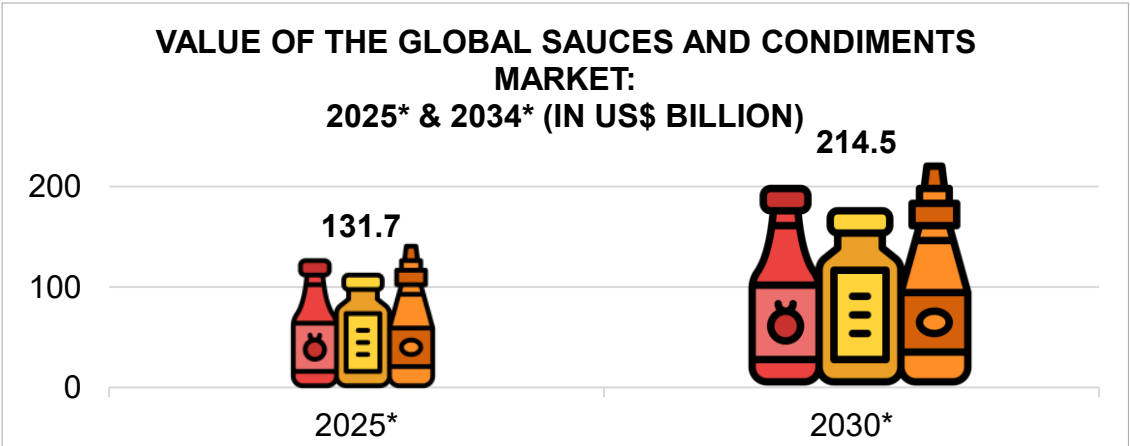


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The global Sauces and Condiments market reached an estimated value of approximately US\$131.7 million in 2025*, as illustrated in the adjacent graph. Moreover, the market is expected to grow at a compound annual growth rate (CAGR) of 5.6%, for the forecast period 2025* to 2034*, to reach approximately US\$214.5 billion by 2034*.

- The growth and expansion of the Sauces and Condiments market is being driven by several factors, including the rising demand for Italian cuisine, which is driving demand for pasta Sauces. Consumers are increasingly exploring pasta dishes and Italian-inspired meals, resulting in notable growth in the market for convenient, ready-to-use pasta Sauces.
- Another key driver of growth in the global Sauce market is the increasing demand for healthier Sauce options, as health-conscious consumers become more aware of the nutritional benefits offered by certain Sauces such as low-calorie soy Sauce and metabolism-boosting hot Sauces.
- The global Sauce market is also benefiting from rapid urbanisation, which is reshaping consumer routines and driving demand for convenience. As more people move to cities and lead busier lives, there is increased interest in ready-to-eat meals and Sauces that offer time-saving benefits.
- However, the growth of the market is expected to be constrained by several factors, including the intense global competition resulting from the presence of numerous established players in the market, and their use of strategic initiatives such as technological collaborations, and mergers and acquisitions to gain market share.

- Additionally the global Sauce market faces considerable price pressure due to escalating raw material costs, primarily driven by climate change impacting crop yields and labour shortages affecting the availability and cost of essential ingredients such as tomatoes, herbs, and spices, amongst others, whilst product recalls are also posing a challenge in terms of undermining consumer trust and reducing sales.
- In terms of market segmentation, the global Sauces and Condiments market is segmented by product type, into Soy Sauce, Hot Sauce, Mushroom Sauce, Cocktail Sauce and Others. In 2024, the Soy Sauce segment was valued at USD 45.3 billion, and it is anticipated to expand to 5.7% of CAGR during 2025-2034.
- The market is also segmented by form into Liquid, Paste, and Dry. The Liquid segment made up 40.2% in 2024 due to ease of use.



* Forecast
** Estimate

SAMPLE FROM REPORT

SA INDUSTRY INNOVATION AND TECHNOLOGY



TAYSTI® VEGAN MAYONNAISE

- AR Brands introduced a new packaging format for its egg- and dairy-free mayo under the Taysti® brand, manufactured in Pietermaritzburg.
- Packaged in a resealable 'doypouch' format, designed for portion control and reduced contamination.
- Certified Kosher and Halal, and formulated for allergen-conscious and vegan consumers.
- Offers a smooth and tangy texture, comparable to conventional mayonnaise.



FRANK'S REDHOT SPICY MAYO

- McCormick launched a new spicy mayonnaise under the Frank's RedHot brand in South Africa in early 2025.
- Combines creamy mayo with Frank's signature cayenne pepper Sauce for added heat and depth. Targeted at both home and foodservice channels, ideal for dipping, spreading, or drizzling.
- Currently available in 1-litre bottles and supported by retail and influencer marketing campaigns.



PIMP MY MAYO

- Think Flavour launched Pimp My Mayo, a new customisable dry spice kit for mayonnaise.
- Debuted four flavour sachets namely Peri-Peri & Spanish Lime, Wild Garlic & Italian Herb, Smoky Barbecue, and Black Truffle & Porcini Mushroom.
- Designed for consumers to mix into store-bought mayo, offering DIY flavoured mayo in under 10 minutes.
- Packaged for home use and gifting, and positioned as vegan, dairy-free and Halal-friendly.



B-WELL VEGAN MAYO – B-WELL FOODS

- Launched in South Africa in September 2024, available in Shoprite stores across Gauteng and KwaZulu-Natal, and online.
- Egg-, dairy-, and gluten-free mayonnaise, designed for allergy-conscious and plant-based consumers. Comes in standard and Reduced Oil variants (47% less fat) and an Olive & Canola blend, delivering creamy taste and heart-health credentials.
- Marketed as versatile; suitable for spreads, dressings, dips and marinades; and supported by Shoprite listing campaign and recipe promotion.

SAMPLE FROM REPORT

TIGER BRANDS: COMPANY NEWS



Tiger Brands Launches ‘#WhoEverTheExplorer’ Campaign

In August 2025, Tiger Brands announced the launch of its ‘#WhoEverTheExplorer’ campaign, introducing Kagiso Magabe as its official Explorer. More specifically, as Tiger Brands’ Explorer, she is set to travel across South Africa sharing stories behind the company’s iconic brands, and highlighting the cultural significance of food in everyday life. *(1 August 2025)*



Tiger Brands Extends Breakfast Programme to Local Primary School

In July 2025, Tiger Brands announced the introduction of a breakfast programme at Tsholetsega Primary School in Mogale City, Gauteng. With support from the Tiger Brands Foundation, the initiative will provide a daily breakfast to 1,280 learners over the next five years. In addition, Tiger Brands will donate 300 pairs of school shoes to learners in need. *(30 July 2025)*



Tiger Brands Launches Community Food Safety Educational Campaign

In June 2025, Tiger Brands launched its ‘Community Food Safety’ educational campaign in partnership with the Tiger Brands Foundation and the Department of Basic Education. In particular, the programme is targeted at primary school learners, aiming to improve food safety awareness and hygiene practices in school communities. *(11 June 2025)*



Tiger Brands Announced as Official Flavour Partner for the ‘World’s Biggest Braai’

In May 2025, Tiger Brands’ All Gold announced via its Instagram page that Tiger Brands had been named the ‘Official Flavour Partner’ for the ‘World’s Biggest Braai’. The post celebrated popular Sauce and Condiment brands, including All Gold and Crosse & Blackwell, and invited customers to embrace the spirit of local flavour by booking tickets for the upcoming event. *(23 May 2025)*



Tiger Brands’ Mrs H.S Balls Presents ‘Sauce of the Year Award’ at Comedy Awards

In April 2025, Tiger Brands’ Mrs. H.S. Balls shared an Instagram post highlighting its role as an official sponsor of the ‘Savanna Comic’s Choice Comedy Awards’. As part of the sponsorship, the brand presented the ‘Sauce of the Year Award’, which was awarded to comedian Noko Mashaba in recognition of his ‘flavour, flair, and humour’. *(12 April 2025)*



Tiger Brands Supports Emerging Township Economy

In February 2025, Tiger Brands provided business and market access support to two emerging township-based agencies, ‘Bloodline’ and ‘Barcode’, through its ‘Enterprise Supplier Development’ programme. Tiger Brands provided a mentorship package to help the agencies grow. The company also commissioned them to brand 50 spaza shop walls with murals. *(13 February 2025)*



Tiger Brands Delivers Solid End of Year Results

In December 2024, Tiger Brands released its results for the year ending 30 September 2024, reporting improved second-half performance as its refreshed strategy gained traction. In particular, the company’s revenue rose 1% to R37.7 billion, supported by portfolio reshaping, ecommerce growth of 54%, and expanded general trade reach to over 91,000 stores. *(4 December 2024)*



Tiger Brands Expands Informal Market Reach with Spaza Store Branding Initiative

In August 2024, Tiger Brands launched a large-scale spaza store branding initiative as part of its township market expansion efforts. The multi-year project aims to brand 2,000 spaza stores with bold murals by 2029, and the initiative has already increased the company’s product availability in over 71,000 general trade outlets nationwide. *(1 August 2024)*



SAMPLE FROM REPORT

SAUCES PRICING ANALYSIS

BRAND AND SIZE			Checkers	Pick n Pay	SPAR	Woolworths
B-Well Thick & Creamy Canola Mayonnaise		740g	R42.99	R45.99	R46.99	N/A
B-Well Reduced Oil Canola Mayonnaise		750g	R42.99	R41.99	R46.99	N/A
B-Well Original Tangy Canola Mayonnaise		750g	R42.99	R41.99	R44.99	N/A
Clover Tangy Mayonnaise		750ml	N/A	R43.99	R42.99	N/A
Crosse & Blackwell Tangy Mayonnaise		375g	R34.99	R36.99	R35.99	N/A
		750g	R49.99	R47.99	R46.99	R48.99
		1.5kg	R98.99	R119.99	R99.99	N/A
		3kg	R196.99	R231.99	N/A	N/A

This pricing analysis was conducted at retail stores and supermarkets during w/c 28 July 2025.

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- *Comparative pricing at Checkers, Pick n Pay, SPAR, and Woolworths*



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