



# Fish and Seafood in South Africa

April 2026

Table of Contents

## Fish and Seafood in South Africa - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Stronger demand for fish amid rising meat prices

#### INDUSTRY PERFORMANCE

Shift to fish at a time of heightened price sensitivity

Increasingly polarised market

#### WHAT'S NEXT?

Further expansion as affordability concerns persist and meat prices remain elevated

Increasingly polarised market, with affordability-driven mass demand coexisting alongside targeted premium growth

Summary 1 - Major Processors of Fish and Seafood 2025

### CATEGORY DATA

Table 1 - Total Sales of Fish and Seafood by Category: Total Volume 2020-2025

Table 2 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Fish and Seafood by Category: Volume 2020-2025

Table 4 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Fish and Seafood by Category: Value 2020-2025

Table 6 - Retail Sales of Fish and Seafood by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2025-2030

Table 9 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2025-2030

Table 11 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2025-2030

Table 12 - Forecast Retail Sales of Fish and Seafood by Category: Value 2025-2030

Table 13 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

## Fresh Food in South Africa - Industry Overview

### EXECUTIVE SUMMARY

Growth increasingly constrained by acute supply-side pressures

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Affordability and heightened health awareness influence consumers' choices

Increasingly polarised market

#### WHAT'S NEXT?

Modest growth, with several challenges remaining prevalent

Home cooking will continue to underpin demand for fresh food

#### CHANNELS

Supermarkets lead, offering broad assortments, competitive pricing and convenience

Flexibility, convenience and familiarity support small local grocers' strong footfall

### MARKET DATA

Table 14 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 15 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 16 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 17 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 18 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 19 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 20 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 21 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 22 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 23 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 24 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 25 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 26 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 27 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 2 - Research Sources

### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/fish-and-seafood-in-south-africa/report](http://www.euromonitor.com/fish-and-seafood-in-south-africa/report).