

CONSUMER EDUCATION PROJECT OF
MILK SA

Cheese Insights

The South African cheese market, consumer trends and growth opportunities

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Cheese Sensory Workshop: SASDT



Rediscover Dairy™

Agenda

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South African cheese market overview

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Market size and value

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Production and milk utilisation

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Consumer consumption patterns

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Purchase drivers

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Strategic opportunities

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Key takeaways

The Cheese Market at a Glance

R13.2bn

Retail cheese market value

103 267 t

Cheese produced annually

28.2%

Milk used for cheese

19.7%

Share of total dairy market

MARKET SNAPSHOT

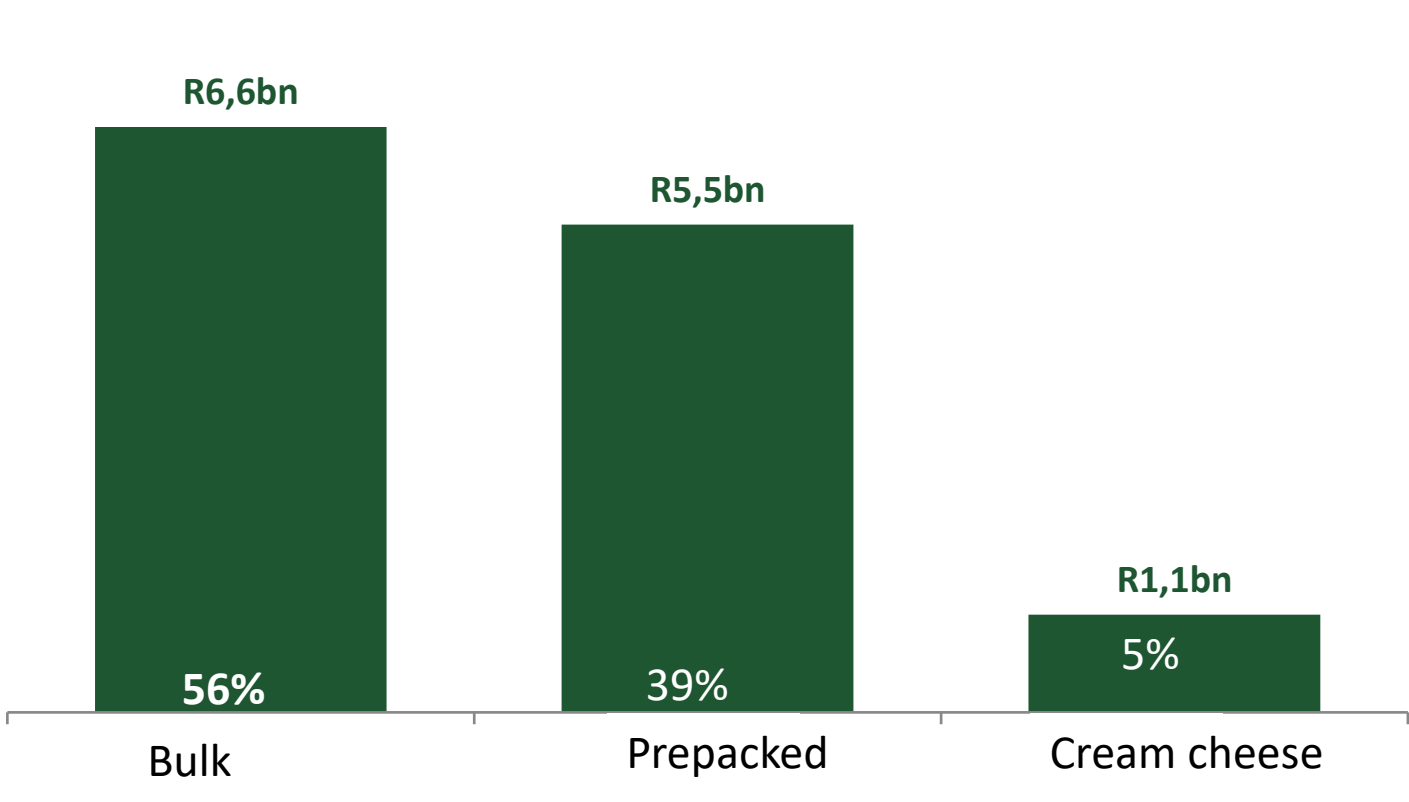
Indicator	Value
Total milk production	3.48 million tons
Milk used for cheese	983 000 tons
Cheese production	103 267 tons
Retail cheese market value	R13.2 billion
Total dairy retail market	R67.3 billion

KEY MESSAGE

Nearly one-third of all milk produced in South Africa is converted into cheese.

Cheese Retail Value Contribution

RETAIL VALUE BY CATEGORY (R BILLION)



R13.2bn

Total cheese market value

19.7%

of total dairy retail sales — one of the most valuable dairy categories

South Africa Is Now a Net Cheese Exporter

South Africa now exports more cheese than it imports.

20 497 t

Cheese exported in 2025

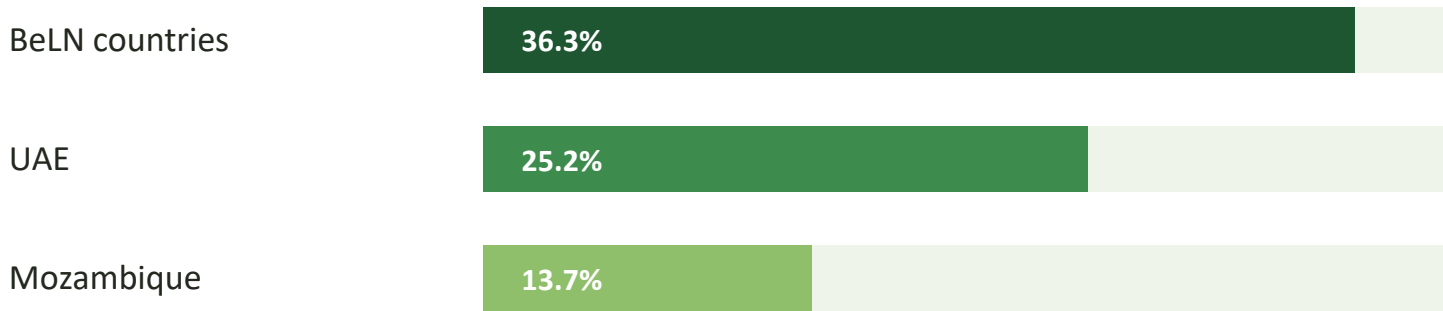
42

Export destination countries

75.2%

Of exports from six countries

TOP EXPORT MARKETS (% SHARE)



Key observation Regional African markets remain the foundation of exports.

WATCH POINT

UAE exports have been disrupted following Foot-and-Mouth Disease restrictions, underscoring the value of a diversified export base.

Imports

Cheese imports on 2025 fromm UK and EU



IMPORTS INTO SOUTH AFRICA

84% European Union

6% United Kingdom

IMPORTED CATEGORIES

- Processed cheese
- Specialty cheeses
- Blue-vein cheeses
- Premium imported varieties

Imports complement rather than compete with local mainstream production.



ARTISANAL MARKET OVERVIEW & INDUSTRY INSIGHTS

LIMITED INFORMATION

Market Context

A small but highly dynamic premium segment

2,500-5,500

tonnes produced annually

3-7%

of total cheese production

Premiumisation

drives strong, sustained
growth

KEY MESSAGE A small but rapidly growing, highly dynamic premium segment.





Milk Utilisation & Product Composition

Low-volume, high-value category

25-55M

litres of milk used annually

0.7-1.6%

of national milk production

Predominantly cow's milk

Forms the volume base of artisanal output

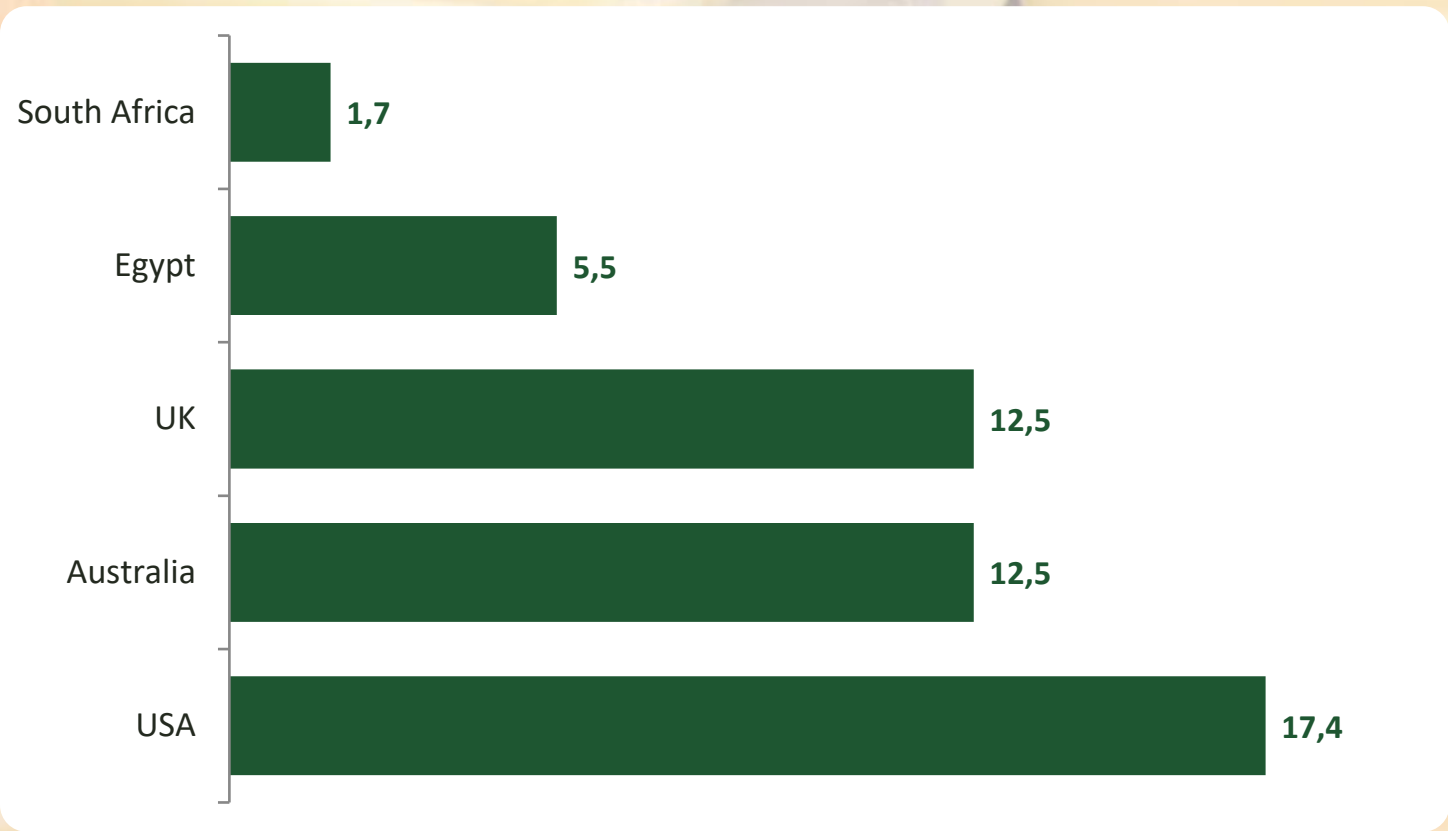
Goat & sheep milk

Key to the high-value premium niche

KEY MESSAGE Artisanal cheese delivers high value despite low volume.

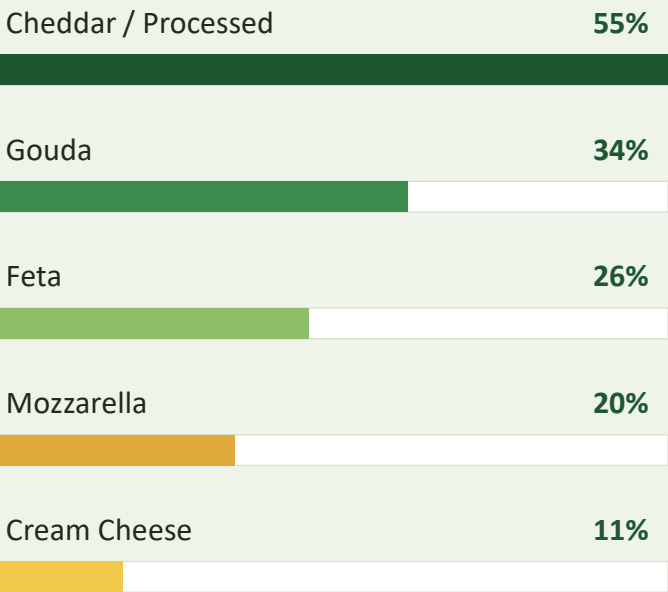
Consumption Remains Low — Room to Grow

PER CAPITA CONSUMPTION (KG / YEAR)



MOST POPULAR VARIETIES

Household penetration



Cheddar and Gouda remain the foundation of the market — and low per-capita intake leaves significant headroom for growth.

How, When & Who Eats Cheese

CONSUMPTION FREQUENCY

40% Once a week

19.9% 2–6 times a week

7% Daily

0.4% Never

Cheese is already embedded in routine eating occasions.

Cheese Consumer Insights • South African Cheese Market

TYPICAL OCCASIONS

Breakfast

Toast • sandwiches

Lunch

Sandwiches • salads

Dinner

Cooking • side dishes

Snacks

Lunchboxes • boards • entertaining

Cheese spans every meal occasion through the day.

WHO CONSUMES CHEESE?

- 35–50 year-old households
- Married couples and families
- Higher LSM and SEM groups
- Concentrated in Gauteng & Western Cape

~60% of consumption comes from singles, due to population size.

Cheese consumption aligns strongly with wine-drinking behaviour.

Why Consumers Buy Cheese

TOP PURCHASE DRIVERS

1. Taste

The dominant reason consumers reach for cheese

2. Versatility

Works as an ingredient and a standalone product

3. Nutrition

Protein, calcium and natural dairy goodness

4. Convenience

Ready-to-eat formats fit busy lifestyles

5. Habit

An established, repeated household purchase

Key takeaway Taste remains the dominant driver — keep positioning cheese as both an ingredient and a standalone snack.

Six Trends Shaping the Market — 1 to 3

01 Convenience & Processed

Urbanisation, busy lifestyles and foodservice growth drive demand.

- Slices & portion packs
- Lunchbox formats
- Snack packs

02 Protein & Health

Cheese aligns perfectly with the high-protein nutrition trend.

- Cheddar 24.7g / 100g
- Gouda 23.9g
- Mozzarella 22.2g
- Feta 17.7g

03 The Snacking Revolution

83% of consumers snack between meals — a major opening.

- Cheese & protein snacks
- Flavoured cottage cheese
- Co-branded innovations



03 Snack
revolution:
Examples of
snacking
video
Cottage/
cream cheese



Six Trends Shaping the Market — 4 to 6

04 Sports Nutrition & High Protein

Positioned as “natural dairy protein.”

- Recovery nutrition
- Active lifestyles
- GLP-1 dietary trends
- Healthy ageing

05 Artisanal & Premium

Consumers are trading up to specialty cheese.

- Aged & specialty cheeses
- Foreign-style varieties
- Locally crafted products
- Driven by social & TikTok

06 Local Sourcing & Sustainability

Provenance and ethics increasingly matter.

- Farm-to-fridge stories
- Supporting local farmers
- Sustainable packaging
- Grass-fed credentials



Premium, artisanal and locally crafted cheeses are the fastest-growing frontier.

#04: Sport nutrition Active Enthusiasts



DBN Review N° 37

A resource about dairy-based nutrition
A product of the Consumer Education Project of Milk SA
www.rediscoverdairy.co.za

This review provides an overview of the nutritional requirement for active enthusiasts and highlights the role of dairy in sports nutrition.

A publication for health professionals

Nutritional considerations and the use of milk and dairy to sustain a healthy and active lifestyle in today's fast-paced society.



Regular physical activity is one of the cornerstones of health, and active lifestyles are often promoted to optimise well-being and prevent disease.¹ For significant health benefits, the World Health Organisation (WHO) recommends that adults (aged

Indoor or gym-based fitness movements such as CrossFit and HYROX fitness racing (combination of high-intensity aerobic physical activity and strength-based functional training) as well as virtual or AI fitness trends using home-based coaching apps and



MEDIA RELEASE

An initiative by the
Consumer Education Project of Milk SA



Fuel an Active Lifestyle with Dairy

A healthy lifestyle does not mean that you have to play an organised sport or follow a gym routine. There are so many other ways that South Africans can embrace an active lifestyle – which is the most powerful choice you can make for your overall health. The combination of moving more, conscious eating and getting sufficient rest is the key to living well. Whether you are running or

#04 Health: High protein Modern weight loss methods GLP-1

**DBN** Review N° 40
A resource about dairy-based nutrition
A product of the Consumer Education Project of Milk SA
www.rediscoverdairy.co.za

A publication for health professionals

The role of dairy in modern weight management



The role of dairy in South Africa

South Africa's food-based dietary guidelines advise consumers to 'have milk, maas or yoghurt every day'. The benefit of this recommendation is increasingly supported by evidence of the health effects of dairy, and that these are not merely the result of individual nutrients but a function of the 'dairy matrix'. By integrating concepts such as the dairy matrix into guidelines, policies and labelling, nutritional management and health promotion can be improved.

reduction during weight loss poses a significant physiological challenge. Weight loss due to an energy-reduced diet often results in a significant decrease in fat-free mass, which can lead to sarcopenic obesity: a clinical state characterised by low muscle mass and impaired physical function. To prevent sarcopenic obesity, it is important to maintain an adequate, nutritious diet with enough protein, together with engaging in regular resistance



**MEDIA RELEASE**
An initiative by the
Consumer Education Project of Milk SA



Why dairy matters on our weight loss journey

The way we think about weight loss today is a clear shift away from traditional dieting. While medications like GLP-1 have become a major talking point, they are just one part of a broader change in how people are approaching their health. Today, the focus is no

<https://www.rediscoverdairy.co.za/media-information/>



Quality seekers

5: Artisanal

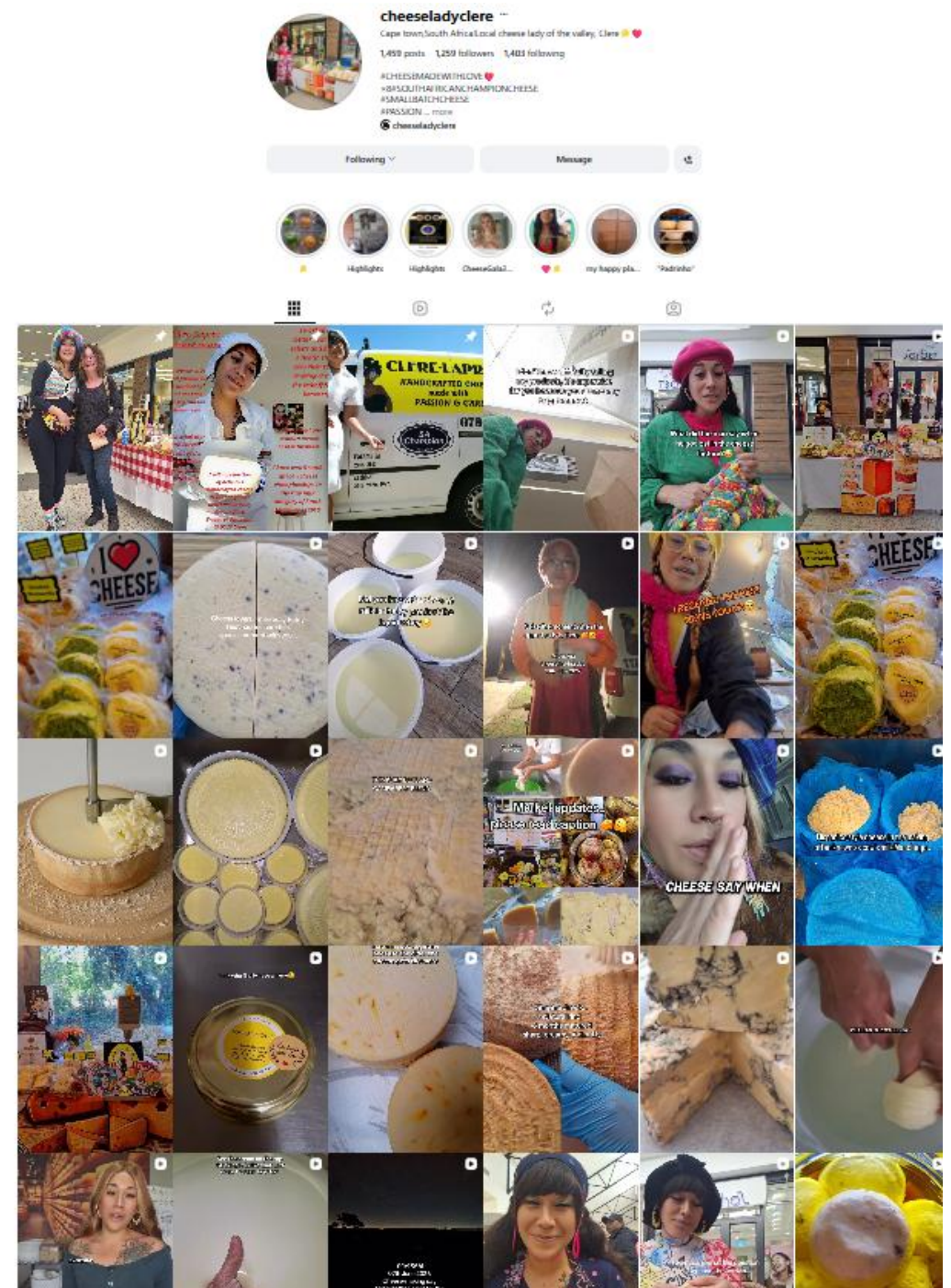
Example of Artisanal cheese awareness

<https://www.instagram.com/reel/DZsGHjTMyyh/?igsh=NXZ2Z2VtYmM3d2V5>

Clere-Lapree Handcrafted cheese

Product innovation is slowing (because of the investment) **but consumers are embracing creative and cost-saving hacks from influencers**

Euromonitor/ Edelman trust barometer



#06 Supporting local farmers

World Milk Day 2026: Women in Dairy

<https://www.rediscoverdairy.co.za/world-milk-day/>





News South Africa

World Milk Day highlights women's growing role in a changing dairy industry

By Clayton Swart 1 June 2026 | 12:46 pm

As South Africa's dairy industry marks World Milk Day on 1 June, the experiences of women across the value chain reflect an industry under increasing pressure as producers and processors navigate rising costs, climate variability, and shifting consumer demand.



Kay-Marie Swart, a cheesemaker at Stonehouse Cheese Estate in Stanford, Western Cape, is one of many women being recognised on World Milk Day for their behind-the-scenes contributions to South Africa's dairy industry. Image: Supplied

McDougall noted that the dairy industry has moved beyond bulk production towards more specialised products, largely driven by shifting consumer demands.

"We've seen a significant shift from commodity-based thinking to value-led innovation. This has driven growth in areas like high-protein products, lactose-free options, and more environmentally responsible packaging."

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Dairy farm profitability under strain

Tanya Chicken, who manages Robhoek Farm in the Tsitsikamma area, said profitability is increasingly constrained by climate variability, rising input costs, and operational disruptions.

"Profitability is increasingly affected by factors outside a farmer's control. Severe storms, for example, can affect the cows and result in a noticeable drop in milk production, even with good management in place," she explained.

These weather events can quickly translate into financial pressure.

"Power disruptions during these periods also mean relying heavily on diesel generators, and at current fuel prices, that places real pressure on cash flow," Chicken added.

She said feed costs remain another major constraint, forcing farmers to reduce their reliance on buying inputs.

"That is why we focus strongly on producing as much high-quality fodder as possible on the farm itself."

Despite these pressures, Chicken said technology is increasingly central to farm management.

"Technology has become a very valuable management tool, because it allows us to identify problems earlier and make more informed decisions."

However, she stressed that technology does not replace experience but rather complements it.

Kay-Marie Swart



South Africa has a long-standing love affair with dairy, and milk production is one of the country's largest agricultural sectors. There are well over a million dairy cattle in the pastures, producing more than 3 billion litres of milk annually to meet the needs of South African consumers. In addition, it is estimated that the dairy industry provides employment for around 80 000 South Africans on farms and at dairy production facilities, and many of these are women.

<https://www.rediscoverdairy.co.za/world-milk-day/>

Barriers to Overcome

BARRIER 1

Fat Misperceptions

CONSUMER BELIEF

“Cheese is unhealthy because it contains fat.”

REALITY

Many consumers remain unaware of current evidence linking dairy foods to cardiovascular health.

INDUSTRY RESPONSE

Improve communication through health professionals and credible nutrition channels.

BARRIER 2

Economic Pressure

CONSUMER BELIEF

Rising debt, reduced discretionary spending and fewer eating-out occasions.

REALITY

Cheese is often perceived as a premium, discretionary purchase.

INDUSTRY RESPONSE

Demonstrate value and nutrition per serving to defend the category.

Barrier 1

Fat in Cheese

<https://www.rediscoverdairy.co.za/wp-content/uploads/2019/08/DBN-19.-Cardiovascular-disease.pdf>



The misperception exists that cheese is high in fat, which it is, but nutrition science has now proven that the saturated fats in cheese does not increase you risk of heart disease.

This data is difficult to transfer to the consumer and the focus at this stage has to be on health professionals especially dietitians and doctors.

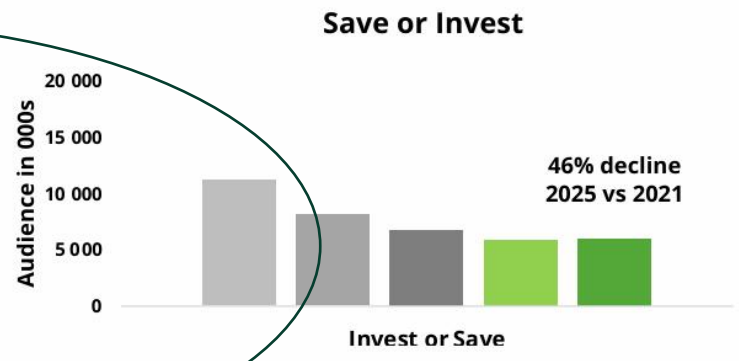
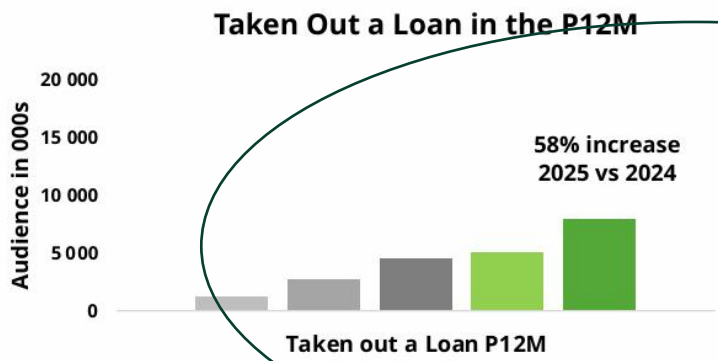
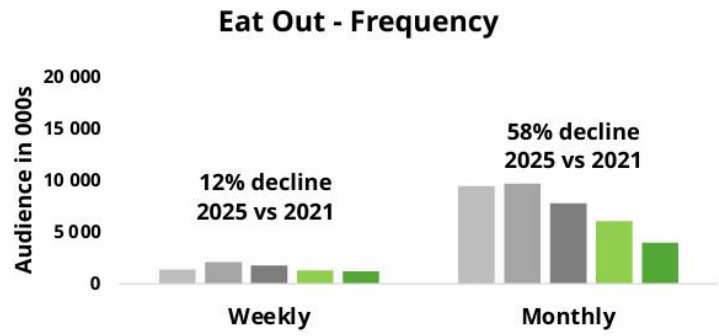
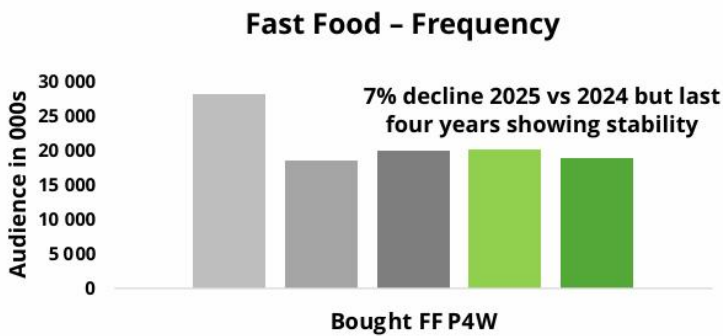
Insert protein and fat content of cheese
Dairy and Cardiovascular disease (Prof Renee Blaauw. Update 2026

Barrier 2

Economic pressure

THE FINANCIAL STRAIN

MARKETING RESEARCH
FOUNDATION



Where the Growth Will Come From

CONSUMER SEGMENTS

Quality Seekers

- Premium
- Artisanal
- Origin-focused

Value Seekers

- Price conscious
- Family purchases

Health & Wellness

- Protein
- Nutrition
- Active lifestyles

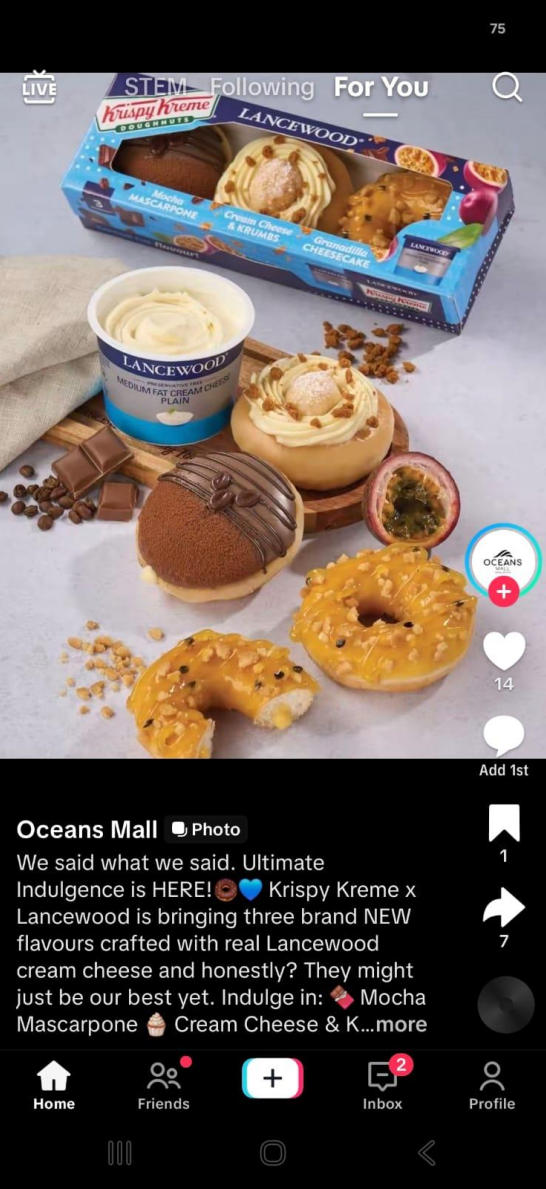
STRATEGIC GROWTH AREAS

- ✓ Protein positioning
- ✓ Snacking occasions
- ✓ Artisanal cheese
- ✓ Convenience formats
- ✓ Local provenance
- ✓ Sports nutrition
- ✓ Premiumisation
- ✓ Dairy-fat education

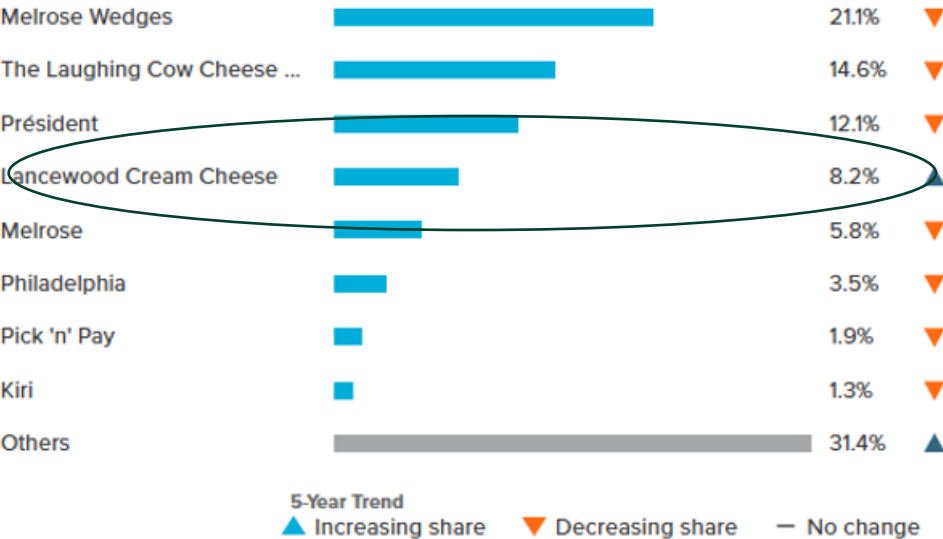
THREE-SEGMENT GROWTH MODEL

Tailoring product, format and messaging to each segment lets the category grow across price points — capturing premiumisation at the top while defending everyday value below.

Cream/ cottage cheese trends and Industry collaborations



Brand Shares of Spreadable Cheese
% Share (LBN) - Retail Value RSP - 2025



Key Takeaways

THE SOUTH AFRICAN CHEESE MARKET

- R13.2 billion retail category
- Nearly 1 million tons of milk utilised
- Now a net cheese exporter
- Low per-capita consumption
- Strong, largely untapped growth potential

FUTURE GROWTH WILL BE DRIVEN BY

- Protein
- Convenience
- Snacking
- Premiumisation
- Artisanal cheese
- Consumer education

South Africa remains a low-consumption cheese market with substantial headroom for growth — particularly through premiumisation, protein positioning, convenience formats and artisanal innovation.

Thank you for listening

