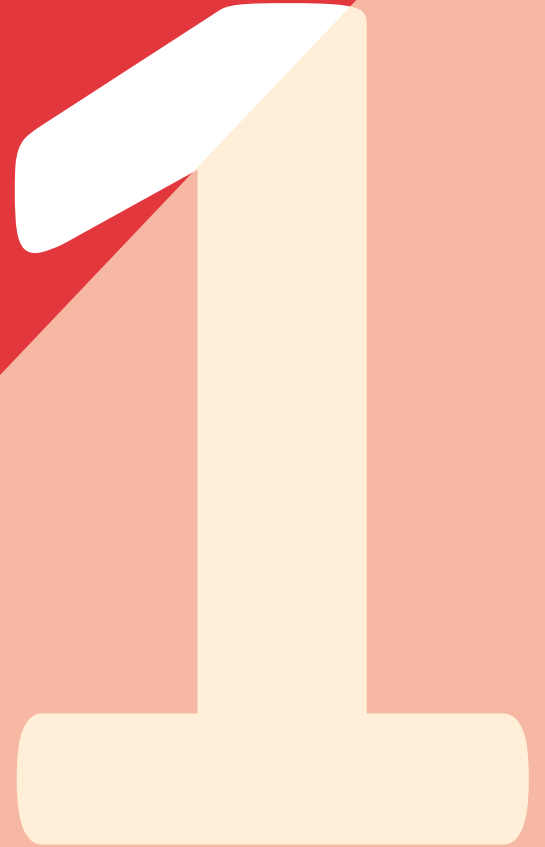


UNDERSTANDING THE EATING HABITS OF THE SOUTH AFRICAN POPULATION



RESEARCH OBJECTIVES

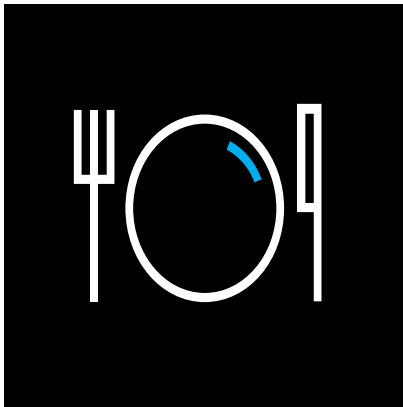


RESEARCH OBJECTIVES

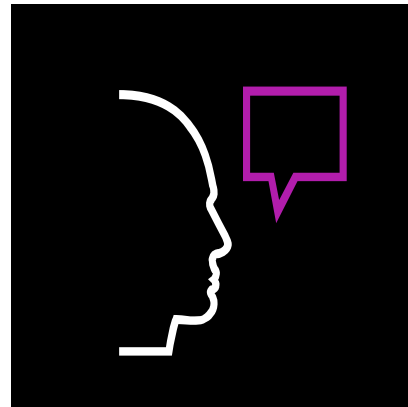


The main purpose of this research is to create a source of information that stakeholders can tap into in order to shape the health of the nation

We aim to gain a clear understanding and track the changes of:



Dietary types and plate composition



Attitudes and behaviour towards food



Understanding of what is healthy



Access to healthy food



Challenges in eating healthy





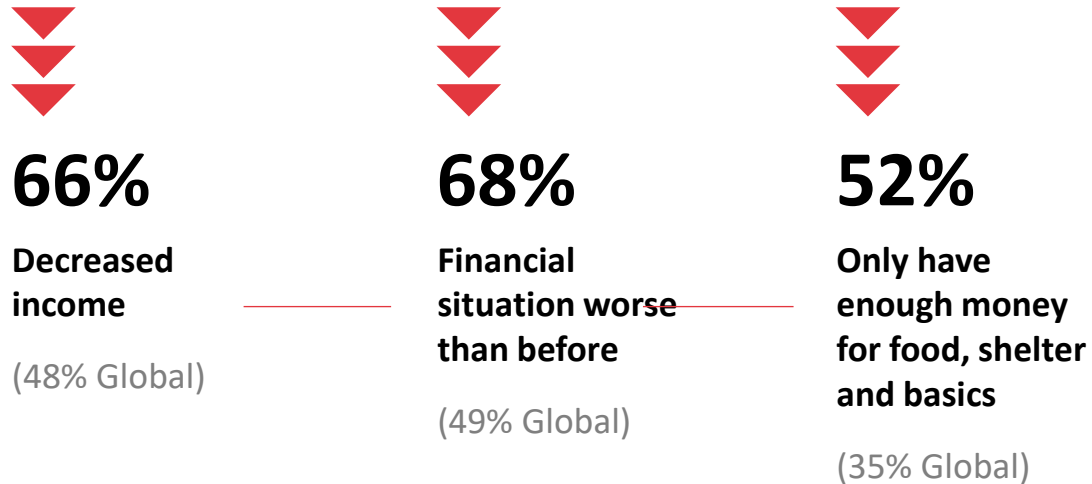
GENERAL EATING HABITS

2

COVID-19 EFFECT ON SOUTH AFRICANS

With declines in income, and being financially worse off due to COVID-19, South African consumers' current ability to spend is much lower than global average.

South African financial situation



South African spending

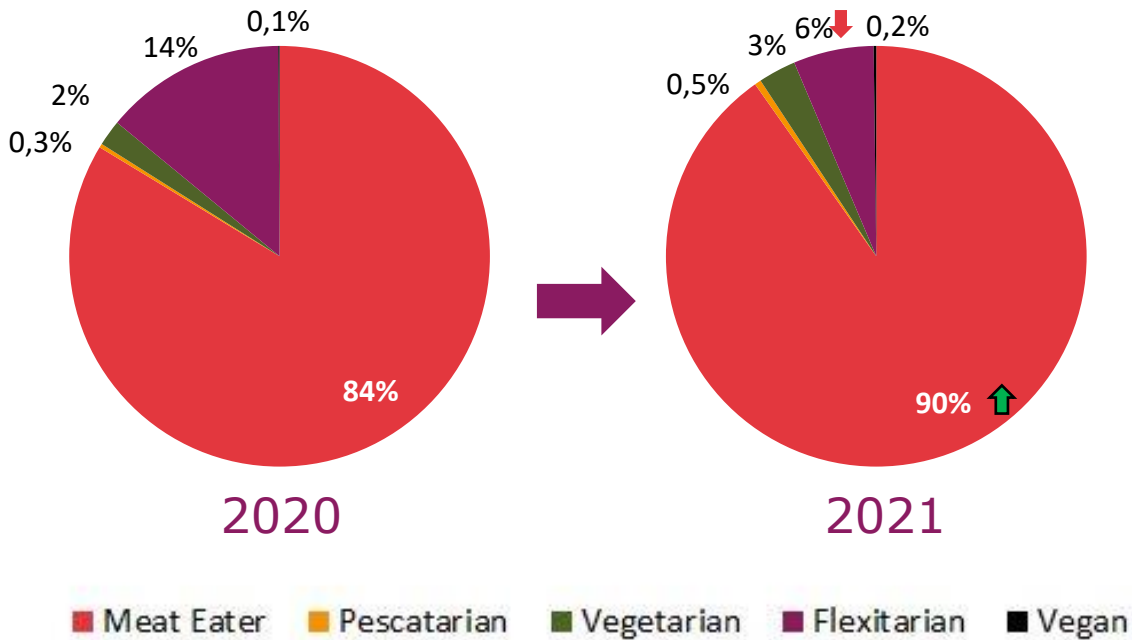


Increase in meat eaters, and a general decline in breakfast consumption



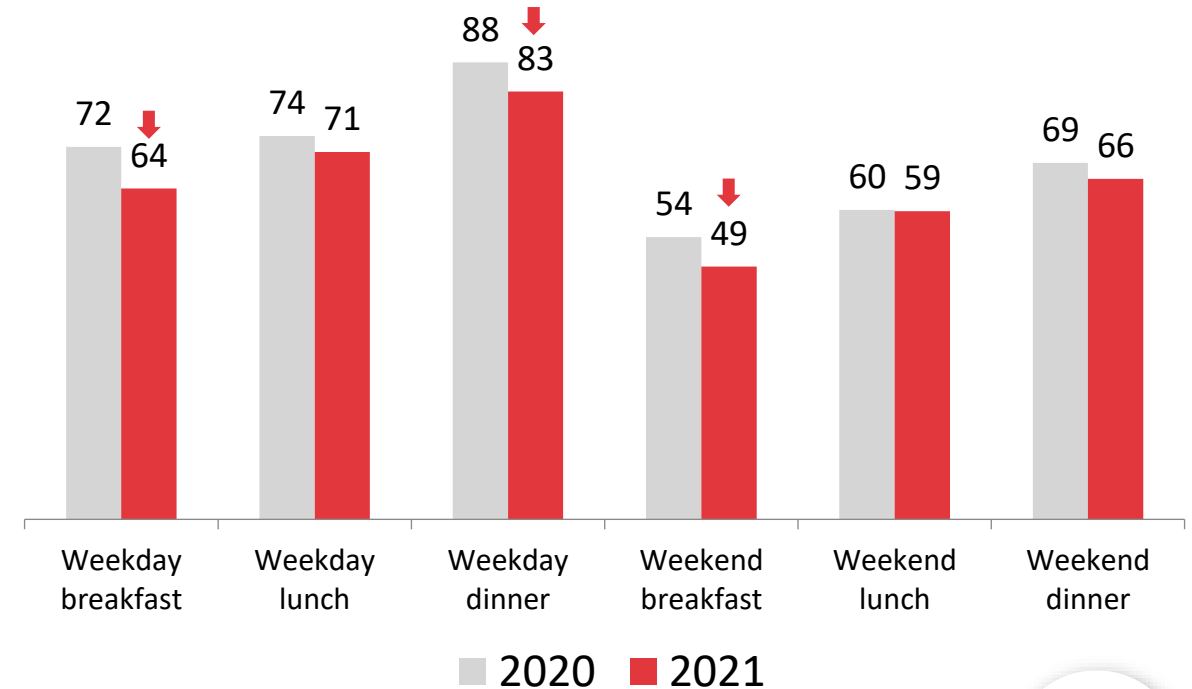
South Africans eat an average of **2** meals per day

SA DIET TYPE BREAKDOWN



↑ Significantly higher than previous year
↓ Significantly lower than previous year

MEAL OCCASIONS



Breakfast declines driven by Black, Male and age 24-35, Urban and Singles

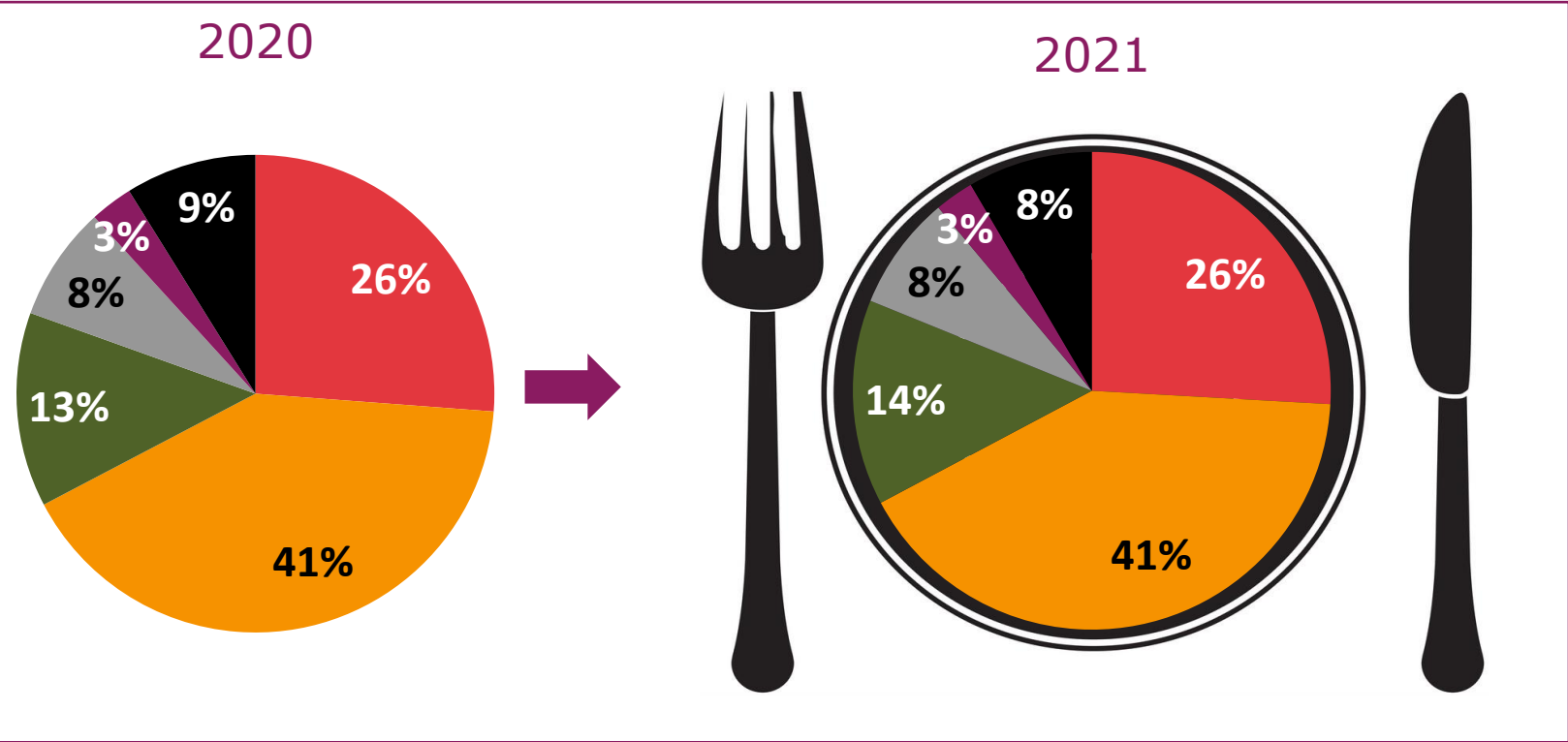


Total South African plate remains consistent with last year, with only a small portion of vegetables



ADULTS AGE 16+

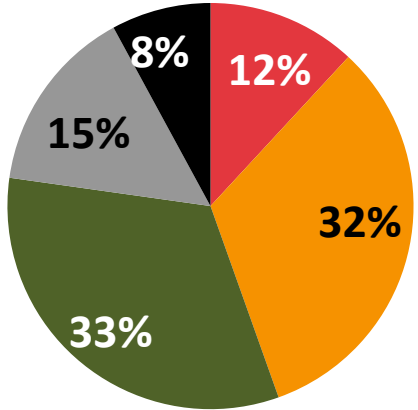
TOTAL SA PLATE COMPOSITION



This is consistent across all regions and demographics with no significant shifts
Different meal occasions also remain consistent with last year

RECOMMENDED COMPOSITION

Source: University of Cambridge – School of clinical medicine



- Meat products (includes eggs)
- Starch
- Vegetables
- Dairy
- Legumes
- Fats & oils



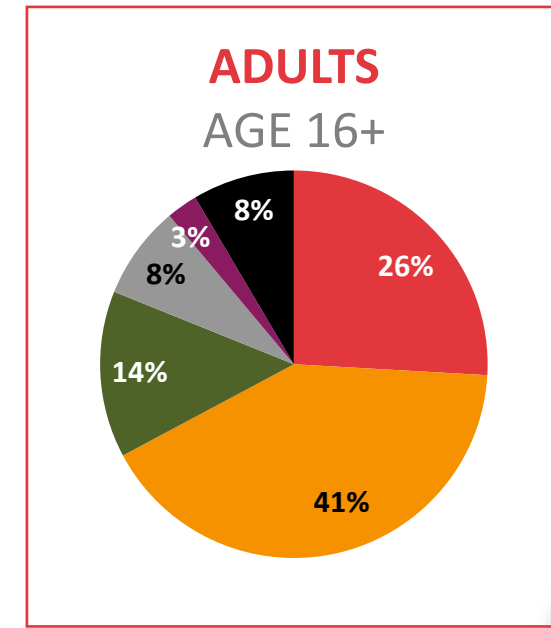
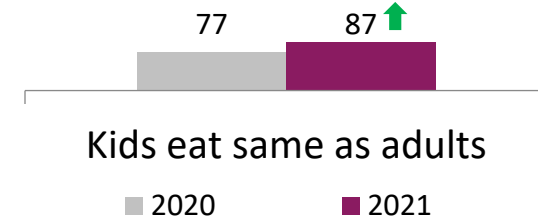
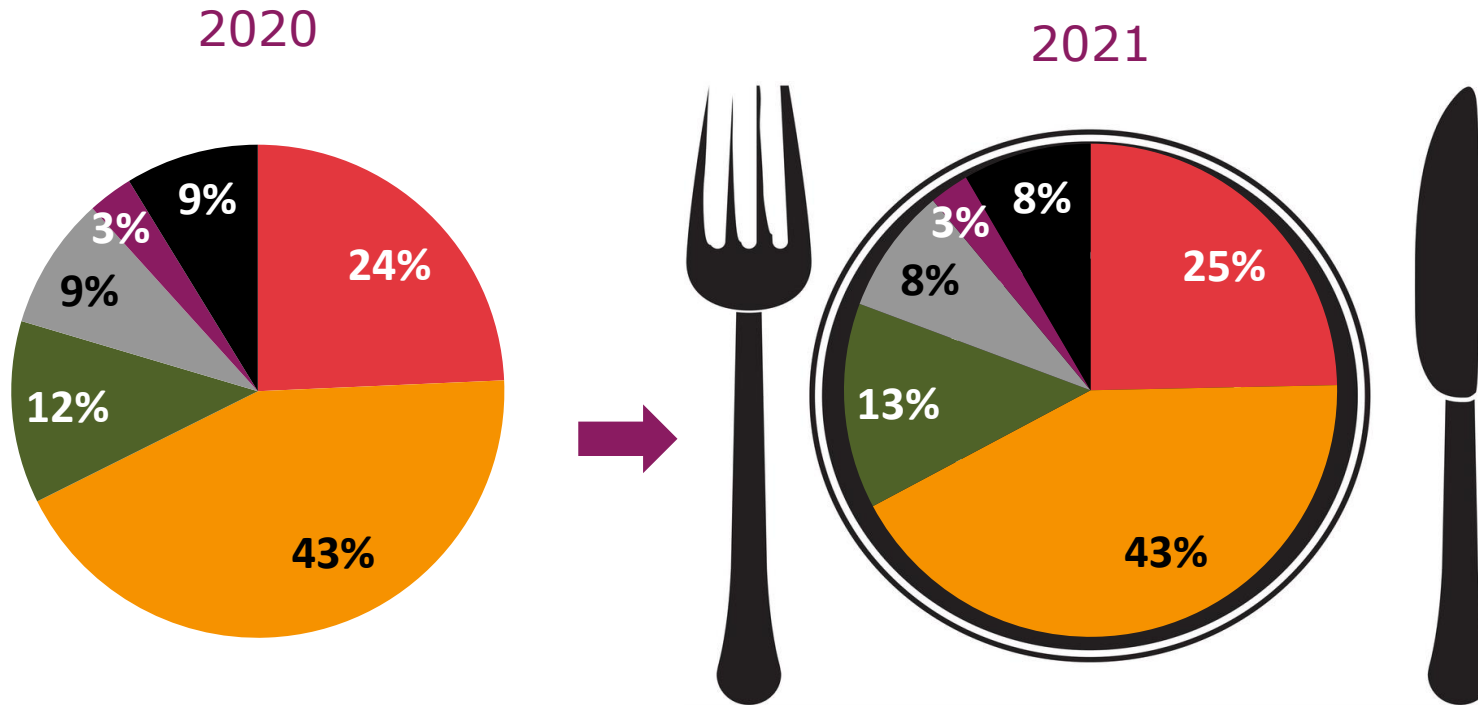
Kids are eating the same plate composition as their parents



Kids are 10% more likely to eat the same foods as their parent's than last year

KIDS AGE 4-16

AVERAGE KIDS PLATE COMPOSITION



■ Meat products (includes eggs)
 ■ Starch
 ■ Vegetables
 ■ Dairy
 ■ Legumes
 ■ Fats & oils

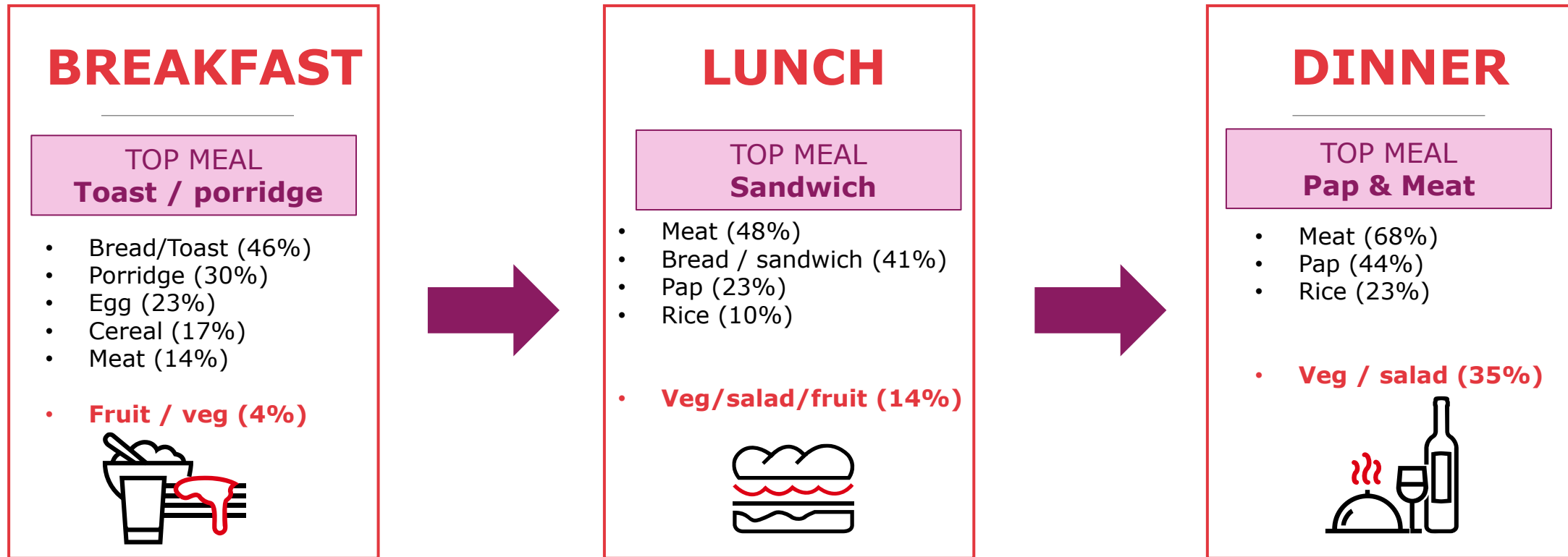
↑ Significantly higher than previous year
↓ Significantly lower than previous year



Top dishes have not changed, with the majority of meat and veg consumed at dinner

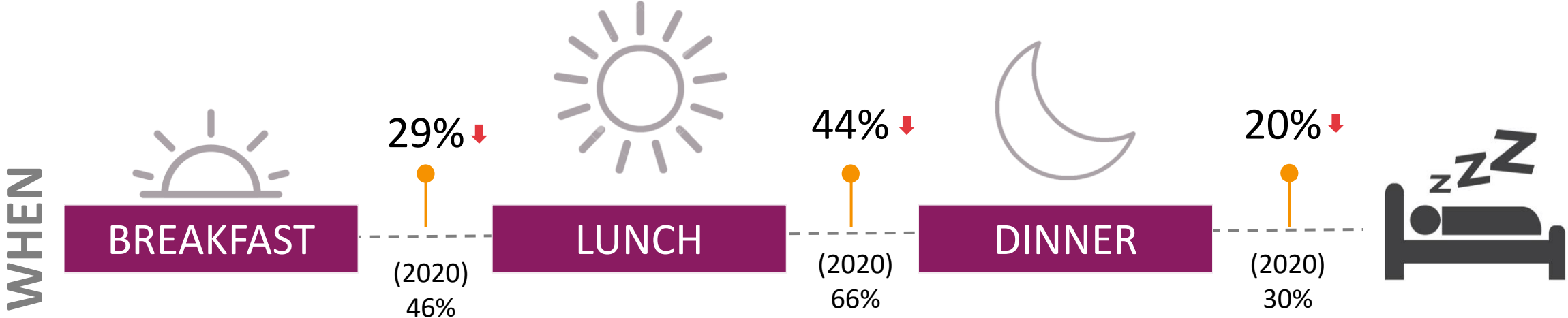


Breakfast is the most carbohydrate heavy meal of the day with the least vegetables/fruit consumed, while dinner has the greatest focus on meat and the highest consumption of vegetables.



Frequency of snacking in between meals declines

70% of people snack in between meals, and this is consistent with 2020. Significant declines seen for chocolate, sweet biscuits, nuts and popcorn.



Declines may be due to affordability

Significantly higher than previous year
 Significantly lower than previous year





FOOD GROUP EXPLORATION

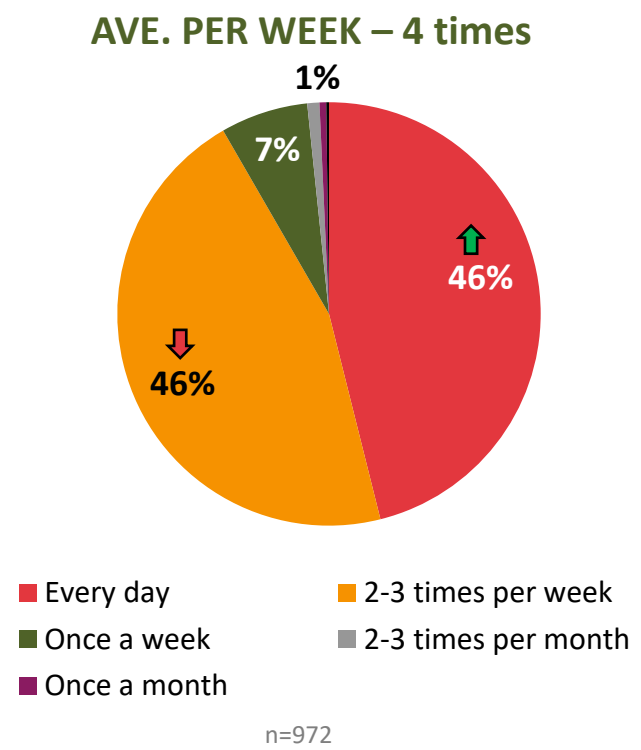
3

More people claim to be eating meat on a daily basis

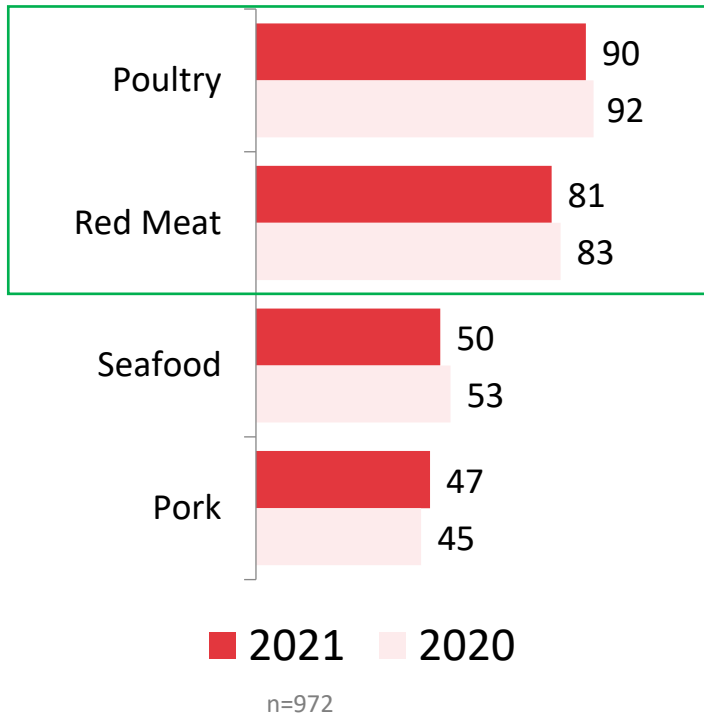


There has been a decline in people using beans as a substitute for meat

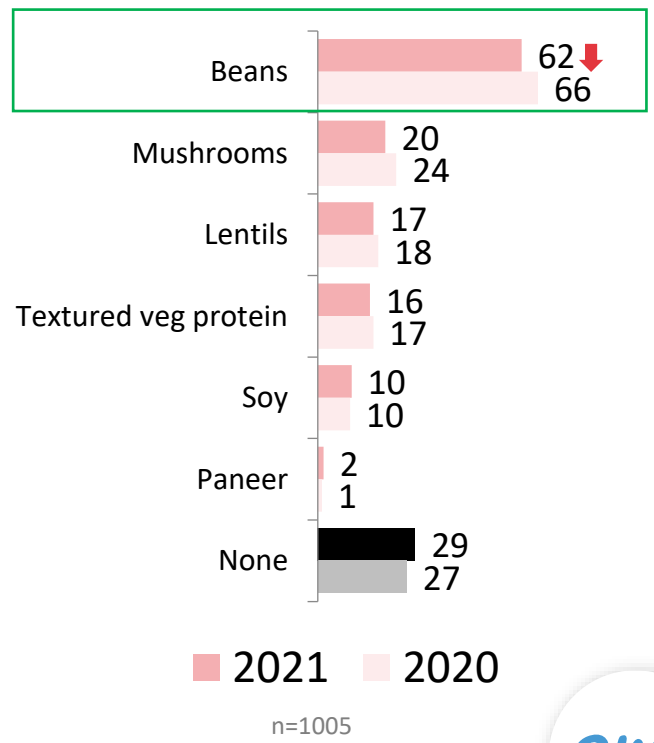
FREQUENCY OF CONSUMPTION



MEAT TYPE REGULARLY CONSUMED



MEAT REPLACEMENTS USED



MEAT EXPLORATION

↑ Significantly higher than previous year
↓ Significantly lower than previous year



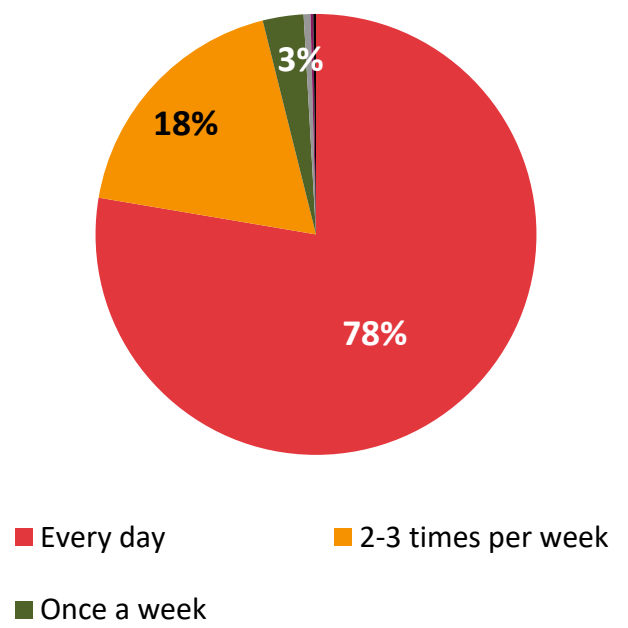
Starch is consumed more often than meat or vegetables, however with less variety



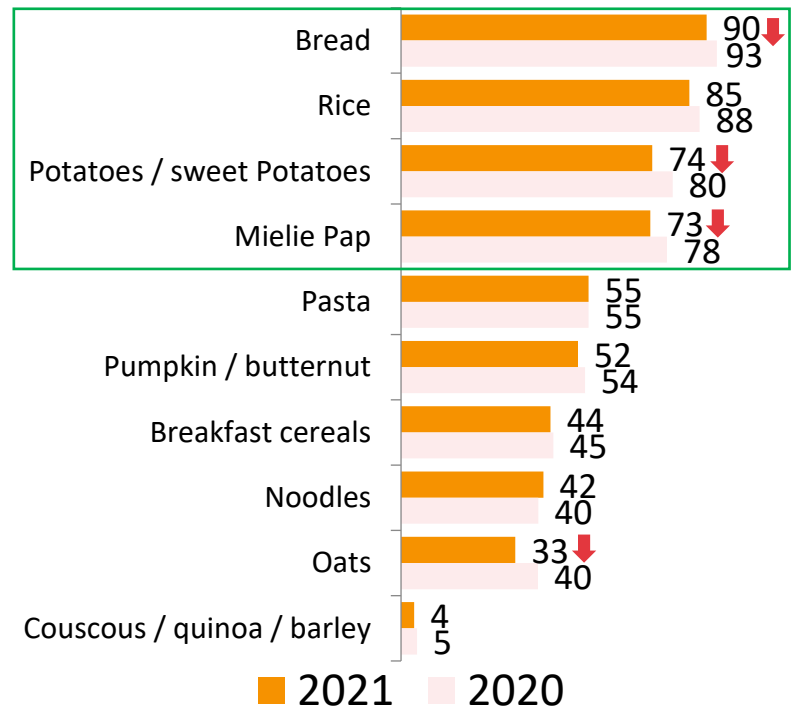
This is likely due to people buying in bulk on promotion

FREQUENCY OF CONSUMPTION

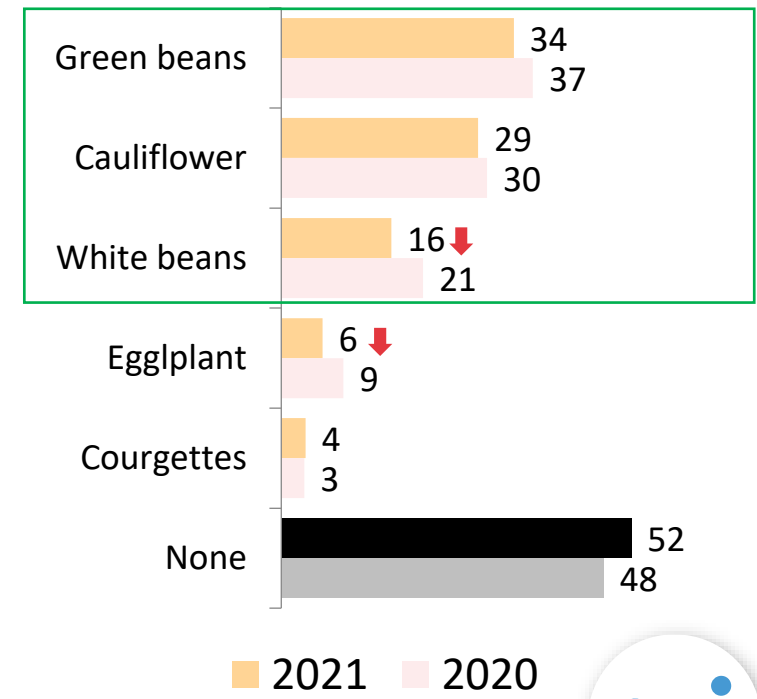
AVE. PER WEEK – 6 times



STARCH TYPE REGULARLY CONSUMED



STARCH REPLACEMENTS USED



STARCH EXPLORATION

Significantly higher than previous year
 Significantly lower than previous year



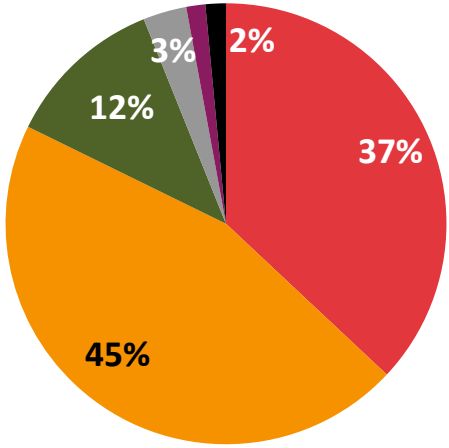
People have less variety of fruit and vegetables in their diet than previously seen



Again likely due to bulk buys or promotional purchases

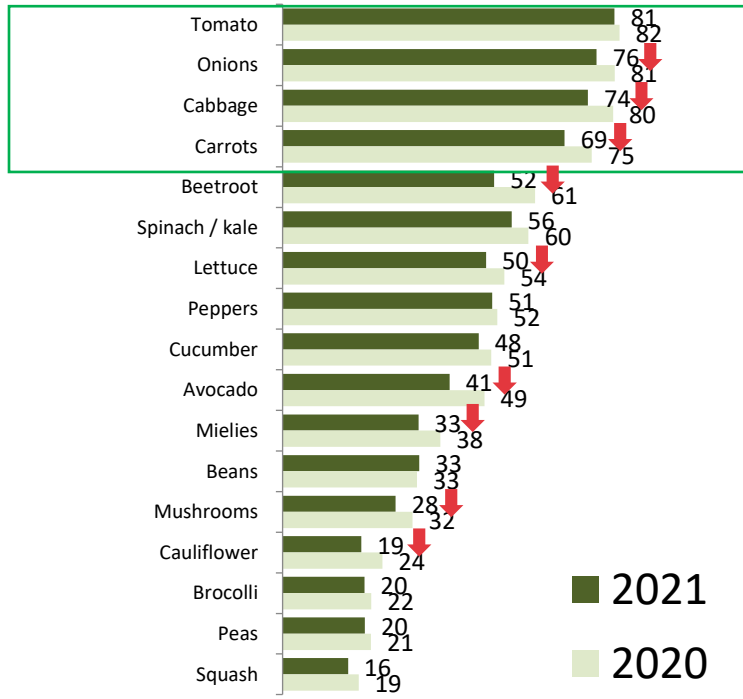
FREQUENCY OF CONSUMPTION

AVE. PER WEEK – 4 times

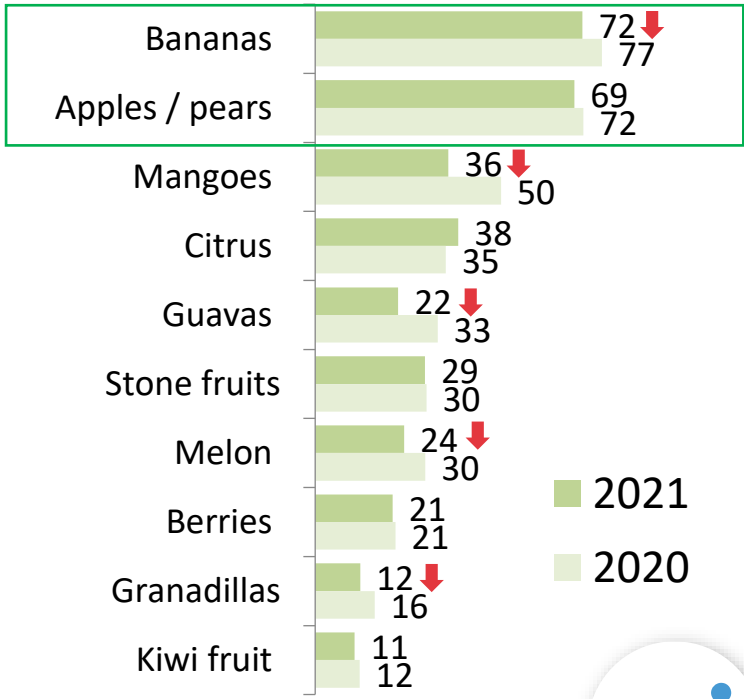


- Every day
- 2-3 times per week
- Once a week
- 2-3 times per month
- Once a month
- Less often

VEGETABLES REGULARLY CONSUMED



FRUIT REGULARLY CONSUMED



- 2021
- 2020

↑ Significantly higher than previous year
↓ Significantly lower than previous year



VEGETABLE EXPLORATION



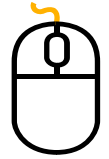
HEALTHY FOODS

4

Increased information seeking online, accessibility to healthy foods improved, but cost is still an issue



ATTITUDES & BEHAVIOUR TOWARD HEALTHY FOODS



- Declines in nutritional information seeking from friends, family and health care professionals, but increases in searching online, especially on Social Media



- Understanding of the concept of a plant based diet is still very low



- Different reactions to the pandemic with some trying to be healthier and others resorting to eating whatever they can afford



- Consumers believe that healthy food has become more accessible over the past year



- The top reason for not eating healthier is price





5

SUMMARY & RECOMMENDATIONS

KEY FINDINGS



- **Increase in meat eaters** in South Africa, with 46% eating meat daily
- **Plate composition is consistent with last year** with no movement towards more vegetables and less meat
- **Kids even more likely to eat the same as their parents** , so there is unlikely to be a change in future behaviour without intervention
- **Vegetables perceived as healthy** but people are eating less variety than before and have not increased the quantity on the plate
- Accessibility of healthy food improved, but **affordability is a more of a barrier than ever before**



People with Purpose Thrive

THANK YOU



Taste good, feel good, force for good.