Industry Nodes and Cluster Development in the City of Joburg

BACKGROUND REPORT: FOOD PROCESSING

Prepared for the City of Johannesburg

Prepared by the Centre for Competition, Regulation and Economic Development

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1 Introduction

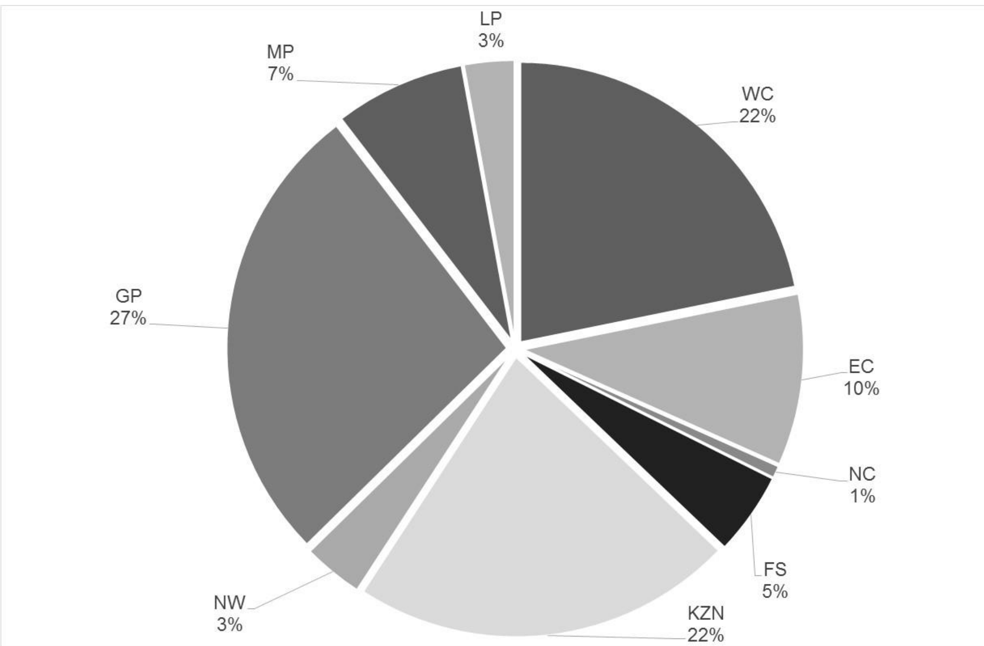
The background report reviews food processing activity within the City of Joburg (the City), with the aim of identifying the potential for cluster development initiatives within the sector. The extent of food processing activity within the City is evaluated via macroeconomic and trade data, supplemented with a review of information from the firm census conducted to establish the extent of manufacturing activity in the City. Our analysis shows that the trade data alone may provide a skewed picture of industrial activity in the City, as exports are often recorded against firms' head offices, thus overstating the volume of exports attributed to the Gauteng region. The firm census provides a more accurate description of actual food processing activity within the City.

The background report proceeds in four parts. The first part provides an overview of Gauteng's performance in the food processing sector relative to other provinces. Part 2 reviews the contribution of the food processing sector to employment. Part 3 reviews trade performance. Part 4 describes the findings from the firm census and identifies the major food processing activities in the City of Joburg. The fifth part concludes with a recommendation for a possible food processing cluster within the City.

2 Industry Performance in Gauteng and the City of Joburg

Gauteng contributed 27% of South Africa's total gross value added (GVA) in the food, beverages, and tobacco sector in 2013; 5 percentage points more than the next largest contributors, the Western Cape and KwaZulu-Natal which both contributed 22% to total GVA (Figure 1).[1]

Figure 1: Provincial GVA, % contribution, 2013

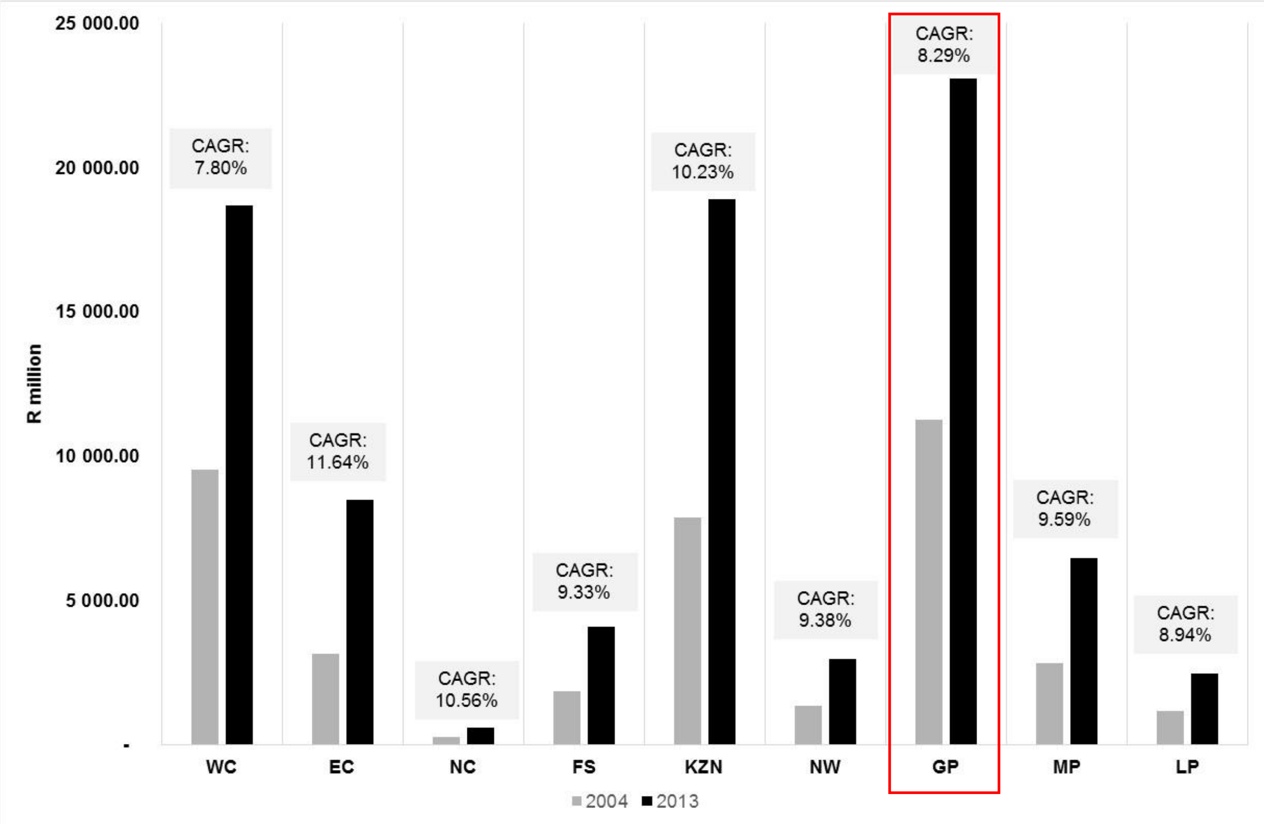


[1] Gross Value Add could not be disaggregated further. Values are thus reported for food, beverages, and tobacco products, though the rest of the report focuses on food processing

Note: GVA at basic prices.
Source: Quantec, retrieved in December 2015

In the ten-year period from 2004 to 2013, gross value add for food, beverages and tobacco products has growth in all provinces. Gauteng's GVA growth has been relatively slow compared to the other provinces, with a CAGR of 8.29% between 2004 and 2013, albeit off a higher base. The Eastern Cape recorded the fastest growth rate with a CAGR of 10.83% while the Western Cape saw the slowest growth, at a CAGR of 7.8% (Figure 2).

Figure 2: Growth in Food Processing GVA, 2004 – 2013



Note: GVA at basic prices.
Source: Quantec, retrieved in December 2015

We now turn to the performance of the City itself. Gross Value Add in the food, beverages and tobacco sector grew from R3.3bn in 2004 to R7.1bn in 2013 (CAGR of 8.82%). This is the fastest growth rate of all municipalities in Gauteng, and is followed by City of Tshwane with a CAGR of 8.72%, and the West Rand with a CAGR of 8.4%. Though Ekhurhuleni recorded a lower CAGR of 7.79%, it does have the largest food, beverages and tobacco sector in absolute terms, with a total GVA of R7.4bn in 2013; R345mn larger than the CoJ (Table 1).

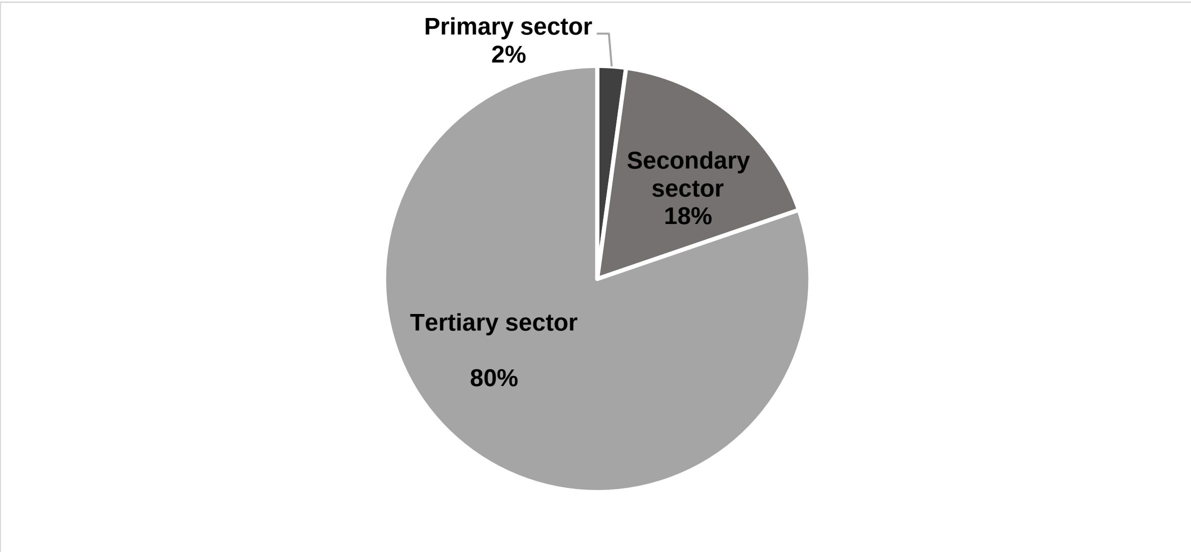
Table 1: GVA from food, beverages, and tobacco by Municipality, 2004 - 2013

Municipality	GVA, 2004 (Rmn)	GVA, 2013 (Rmn)	CAGR 2004 – 2013, %	Proportion of total GVA
City of Joburg	3 312.58	7 088.2	8.82%	0.31
City of Tshwane	2 208.58	4 685.4	8.72%	0.20
Ekurhuleni	3 783.00	7 433.0	7.79%	0.32
West Rand	8 21.47	1 697.3	8.40%	0.07
Metsweding	259.08	485.7	7.23%	0.02
Sedibeng	888.48	1698.6	7.47%	0.07

3 Employment

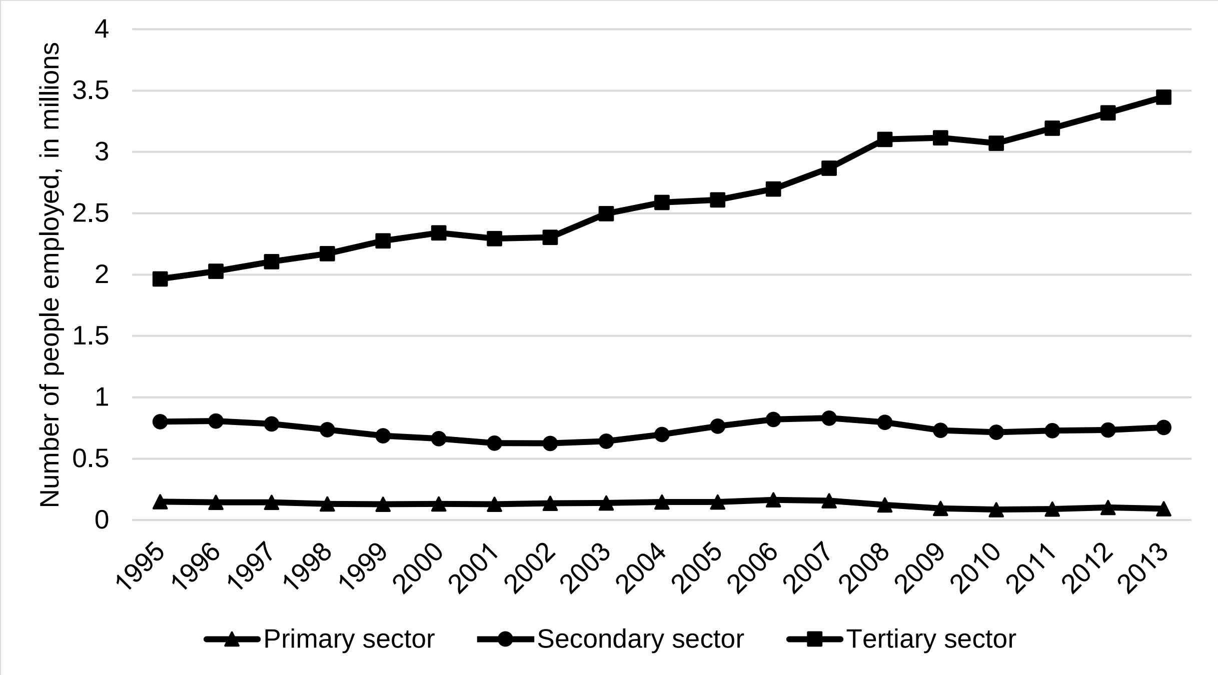
The secondary sector contributed 18% of total Gauteng employment in 2013 (Figure 3). Of that, manufacturing accounted for 62% of employment. The food, beverages, and tobacco sector accounted for 13% of total manufacturing employment, the joint second largest employer after the metals, metal products, machinery and equipment subsector (Table 2).

Figure 3: Sector Employment, % contribution, 2013



In the 19-year period from 1995 to 2013, employment in the primary and secondary sectors within Gauteng has declined while there was a steady increase in employment in the tertiary sector (Figure 4). The secondary sector's decline (CAGR of -.034%) has been slow compared to the primary sector (CAGR of -2.62%). Tertiary sector employment recorded positive growth, with a CAGR of 3.17%.

Figure 4: Gauteng Employment Trend by Major Sector, 1995 - 2013



Within the manufacturing sector, the food processing subsector is one of the few that recorded positive growth with a CAGR of 0.64% (Table 2). The only other sectors that recorded positive employment growth over the period are petroleum, chemicals, rubber and plastic products (CAGR of 0.77%); metals, metal products, machinery and equipment (CAGR of 0.41%) ,and electrical machinery and apparatus (CAGR of 1.38%).

Table 2: Employment from Food, Beverages, and Tobacco by Industry, Gauteng, 2004 - 2013

Industry	**2004**	**2013**	**CAGR**	**Proportion of total employment[2]**
Food, beverages and tobacco	55 643	58 955	0.64%	0.13
Textiles, clothing and leather goods	34 955	25 486	-3.45%	0.05
Wood, paper, publishing and printing	43 804	39 079	-1.26%	0.08
Petroleum products, chemicals, rubber and plastic	57 187	61 279	0.77%	0.13
Other non-metal mineral products	32 935	28 080	-1.76%	0.06
Metals, metal products, machinery and equipment	142 637	148 021	0.41%	0.31
Electrical machinery and apparatus	17 013	19 248	1.38%	0.04
Radio, TV, instruments, watches and clocks	8 765	8 458	-0.40%	0.02
Transport equipment	42 914	39 817	-0.83%	0.08
Furniture and other manufacturing	51 842	41 683	-2.39%	0.09

[2] May not add to 1 due to rounding

Turning to the City of Johannesburg, employment in the food, beverages and tobacco sector grew from 15 658 in 2004 to 16 999 in 2013 (CAGR of 0.92%). This is the second largest growth rate of all municipalities after the City of Tshwane (CAGR of 1.13%). Although the City of Johannesburg recorded lower employment growth than City of Tshwane, it has a larger food, beverages and tobacco sector employment in absolute terms (Table 3).

Table 3: Employment from Food, Beverages, and Tobacco by Municipality, 2004 - 2013

Municipality	2004	2013	CAGR	Proportion of total Employment
Sedibeng	4 268	4 307	0.10%	0.07
Metsweding	1 590	1 480	-0.80%	0.03
West Rand	5 044	4 982	-0.14%	0.08
Ekurhuleni	18 690	19 692	0.58%	0.33
City of Johannesburg	15 658	16 999	0.92%	0.29
City of Tshwane	10 393	11 496	1.13%	0.19

4 Trade in processed food products

4.1 Exports of processed food products

Exports of processed food from the City of Joburg increased from R2.3bn in 2004 to R25.2bn in 2013, but decreased to R12.9bn in 2015.[3] This drop in exports follows large decreases in exports of cereals (-R5bn), sugar and sugar confectionary products (-R1.5bn), prepared vegetables, fruits and nuts (-R1bn), and of 'dairy produce, birds' eggs, natural honey, and edible products of animal origin' (-R0.8bn) (Figure 5).

The five largest categories of processed food exports from the City of Joburg in 2015 were: (1) miscellaneous edible preparations, (2) cereals, (3) dairy produce, birds' eggs, natural honey and edible products of animal origin', (4) preparations of cereals, flour, starch, milk or pastry products; and (5) edible fruit and nuts; peel of citrus fruit or melons (Figure 6).

[3] For the purposes of the analysis of trade data, prepared foodstuffs exclude beverages, spirits, and vinegar; and tobacco and manufactured tobacco substitutes.

Figure 5: Change in Exports of Processed Food[4] from City of Joburg, 2013 - 2015

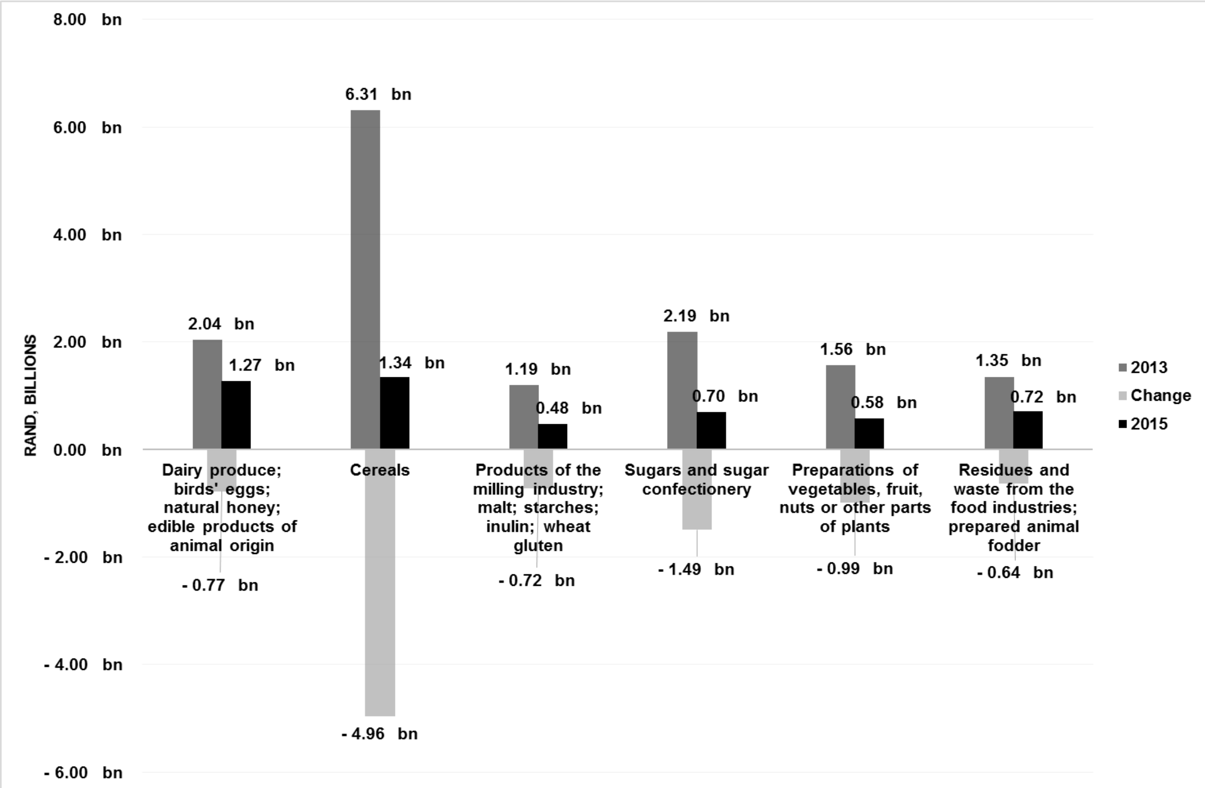
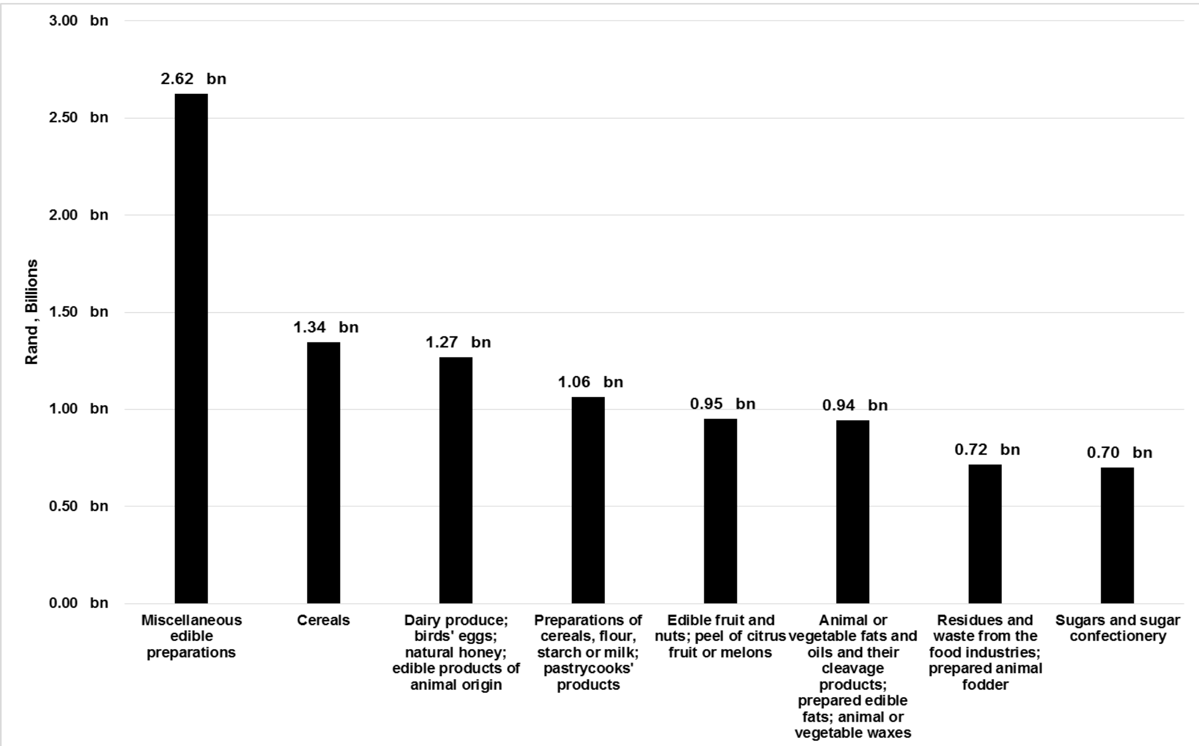


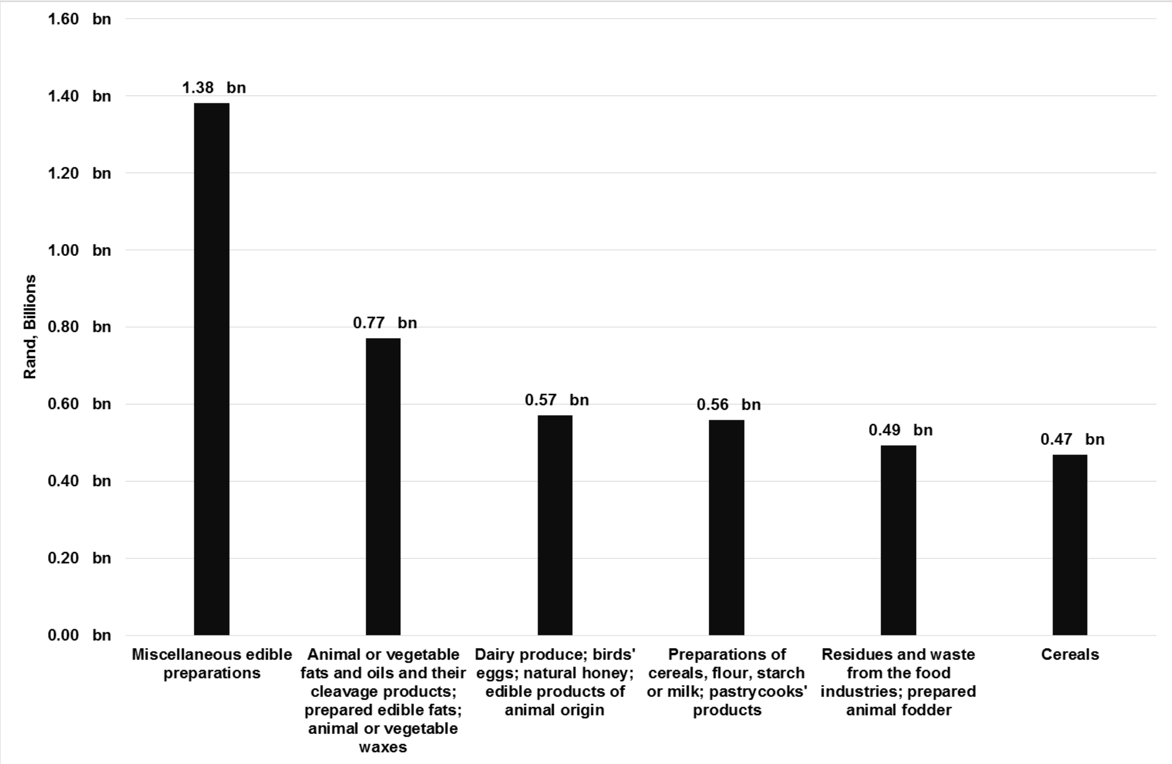
Figure 6: Exports of Processed Food from City of Joburg to the World, 2015



[4] For the purposes of space, we only show the top six changes in exports.

Exports of processed food to SADC (excluding SACU) did not show the same large decrease between 2013 and 2015. Instead, exports to SADC increased steadily from R1.2bn in 2004 to R6.2bn in 2015 (CAGR of 16%). The largest exports to SADC countries in 2015 were (1) 'miscellaneous edible preparations' (R1.4bn), (2) animal or vegetable fats and oils (R0.8bn), and (3) dairy produce, birds' eggs, natural honey and edible products of animal origin (R0.6bn) (Figure 7).

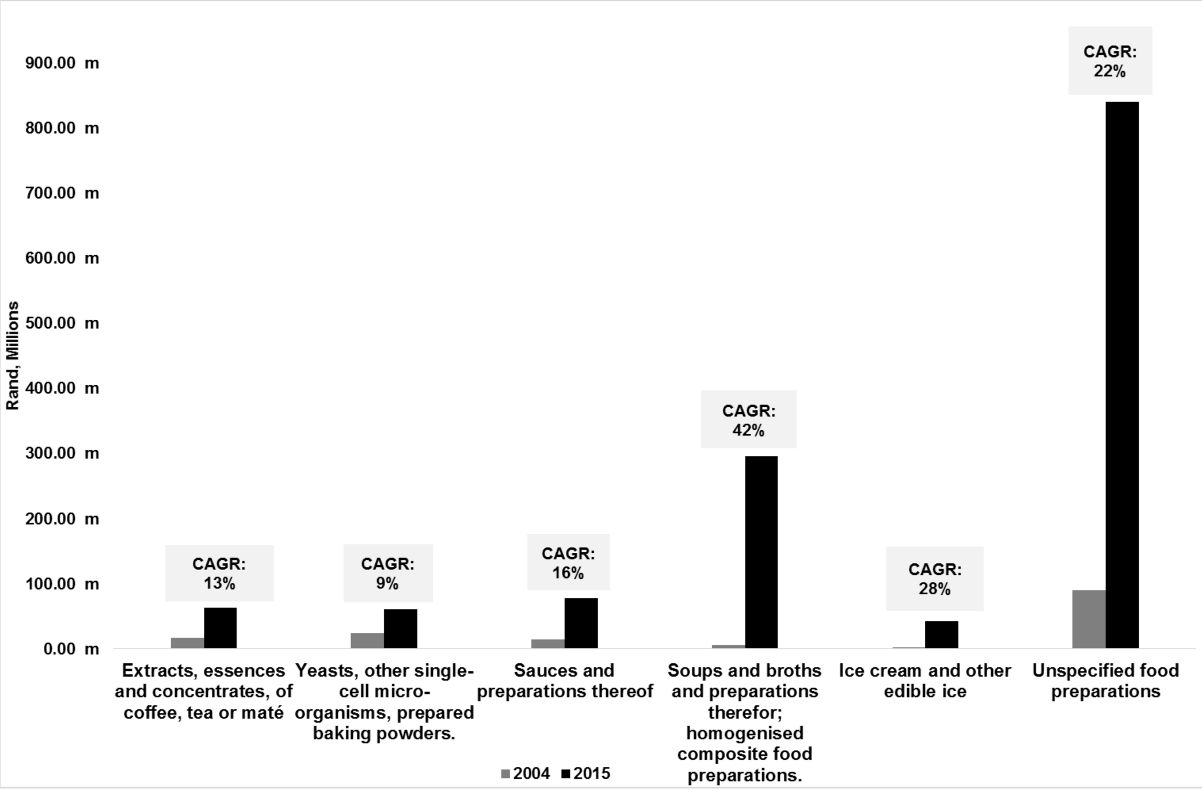
Figure 7: Exports of Processed Food[5] from City of Joburg to SADC (excluding SACU), 2015



These broad categories are not very instructive, and are broken down into their constituent parts below. Within the category of miscellaneous edible preparations, exports of soups, broths and preparations thereof increased significantly from R6.1m in 2004 to R295.4m in 2015 (CAGR of 42%), followed by ice cream and other edible ice (CAGR of 28%), unspecified food preparations (CAGR of 22%), sauces and preparations thereof (CAGR of 16%), and extracts, essences and concentrates, of coffee, tea or mate (CAGR of 13%). Yeasts, other single-cell micro-organisms and prepared baking powders increased by the lowest rate (CAGR of 9%) (Figure 8).

[5] For the purposes of space, we only show the top six categories within the Processed Foods.

Figure 8: Growth in Exports of Miscellaneous Edible Preparations[6], 2004 – 2015



The largest growth in exports within the category of animal or vegetable fats and oils was from the soya-bean oil (CAGR of 58%) between 2004 and 2015. In particular, for the year 2015, the exports of soya-bean oil were highest in absolute terms (R515.4m), followed by sunflower-seed, safflower or cotton-seed oil (R106m), palm oil (R51.4m), margarine (R45.1m), and hydrogenated, inter-esterified, re-esterified or elaidinised animal or vegetable fats and oils (R30.6m).

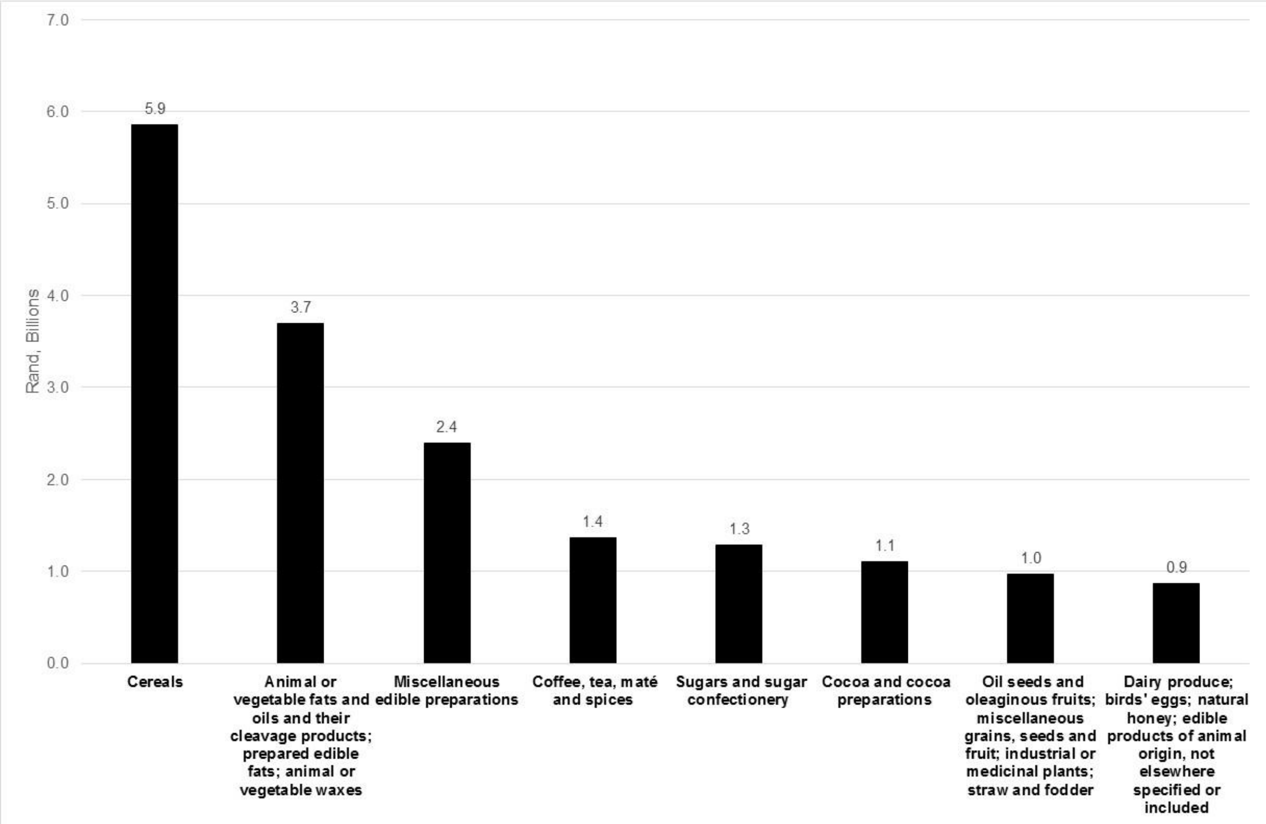
In the category of dairy produce, birds' eggs, natural honey and edible products of animal origin, exports of natural honey increased significantly (CAGR of 32%) from R49 335 in 2004 to R1m in 2015, followed by exports of ‘buttermilk, curdled milk and cream, yogurt and kephir’ (CAGR of 30%), which were the largest exports in 2015 in absolute terms (R190.9m). The second largest were un-concentrated milk and cream (R151.5m), followed by concentrated milk and cream (R108.4m), cheese and curd (R43.1m), and dairy spreads together with butter and other fats and oils derived from milk (R37.5m).

4.2 Imports of processed food products

Food processing imports into Johannesburg have grown steadily from R5.8bn in 2006 to R20.9 bn in 2015, a compound annual growth rate of 15.4%. The largest subsectors in terms of the value of imports in 2015 was cereals (Figure 9). In the previous section, we noted a significant drop in cereal exports. The import data confirms that there has been a shift in production of cereal products and an increasing reliance on imports to meet the gap.

[6] For the purposes of space, we only show the top six growth rates

Figure 9: Imports of Processed Food from City of Joburg to the World, 2015



Rice accounted for 47% of total cereal imports in 2015, followed by maize (25%) and wheat (23%). There are opportunities for regional sourcing of these products.

In the second largest category of imports (animal and vegetable fats etc.), palm oil accounted for 54% of total imports, followed by soybean oil (16%) and sunflower and safflower oil (12%).

It is more difficult to assess which products were actually imported in the subcategory ‘miscellaneous edible preparations’. Most of imports within this category (59%) were simply recorded as ‘food preparations not elsewhere specified’. The second and third largest imported products within this category are extracts, essences and concentrates for coffee and tea (32% of total for the subcategory);[7] and sauces, condiments and seasoning (5% of total).

4.3 Insights from trade data

It is difficult to draw definitive insights from trade data as the data does not necessarily reflect manufacturing activity, but records trade against firms’ head office locations. Nonetheless, some initial sectors of interest are emerging.

If we focus on our closest trading partners – that is, other SADC countries excluding SACU, there seems to be a clear opportunity to export sauces, spices, condiments and powdered soup products. The City has a number of advantages in considering this as a possible area of focus: the products are small (concentrated) and easy to transport, there are large and small

[7] It is likely that these are imports recorded against Nestle’s head office in Bryanston.

manufacturers with an established presence in the City, and larger supermarket chains with a presence in other African countries represent a fully formed route to market for these products.

The second large subcategory of exports includes oils and fats. Interestingly, the bulk of exports in this subsector is accounted for by soybean oil. Sunflower oil is the second largest export, with margarine the third largest product. Given that we also record large imports of soybean and sunflower, this indicates South Africa's capability for processing soya and sunflower oil. The large oil processing facilities are, however, located in Kwa-Zulu Natal, though there are a few smaller oil processors in Gauteng. The leading margarine producer in South Africa (Unilever) is located in Ethekwini, but our research has not shown a large margarine producer within the CoJ. Based on a preliminary assessment, this does not seem like a fruitful sector for cluster initiatives.

The third largest export to SADC is milk and milk products. This is largely made up of yoghurt and unsweetened milk (likely UHT). These exports are probably those of Clover and Nestle, both large multinationals headquartered in Johannesburg. Previous research conducted by CCRED indicates that there are high barriers to entry into dairy processing as the sector already has a large number of processors with excess capacity. Firm interviews also suggested that it is becoming increasingly difficult to access other African markets as governments close their borders to protect local dairy farmers. Any cluster in this sector is thus likely to be to the advantage of large, established players (which is not necessarily negative), who already have extensive programmes in place to drive efficiency.

A sector that may benefit from a cluster initiative is the sugar and sugar confectionery sector. Though it is not presently a large export to SADC, it is the 8th largest export category to all destinations and there has been significant growth in sugar confectionery exports over the last 9 years. Between 2006 and 2015, exports of sugar confectionery grew at a compound annual growth rate of 54%. Within this, chewing gum grew at a CAGR of 16% and other sweets at a CAGR of 30%. Similar to spices, sauces and condiments, sugar confectionery is small and easy to transport. There are also opportunities to purchase raw sugar from Zambia, the lowest cost sugar producer in the world.

5 Food-manufacturing activity across Johannesburg's industrial nodes[8]

The scoping study identified 108 food processing firms across the City of Joburg.[9] Forty-eight (48) of these firms are located in the 7 nodes selected for in-depth interviews. Kya Sand has the largest number of food processing firms with 17, followed by Robertville with 9, and Strijdom Park with 8.

The largest food processing subsector is 'baked goods' with 31 firms. This includes a range of products, including biscuits, samoosas, spring rolls, bread, ice cream cones, and gluten-free products. The largest product category is biscuits with a total of 7 biscuits manufacturers across the City. Many of the 'baked goods' manufacturers respond to some specialist or niche market. For example, there are two manufacturers that focus on gluten-free products, there is

[8] This section is based on information from the census/scoping study conducted across the 28 industrial nodes in the City of Joburg.
[9] Twelve additional firms were identified as being involved in the provision of food service (catering) equipment, catering products and manufacturing equipment used in food processing.

one manufacturer that focuses only on rusks, and another that focuses on wrapped biscuits for the hospitality trade.

The next largest sector is spices, sauces and condiments with 19 manufacturers. These firms are spread across a number of nodes with no real concentration in any one node. Kya Sand has 3 firms that manufacture sauces, spices or condiments. There are a number of nodes with 2 firms: Booysens/Reuven/Ophirthon, Honeydew, Longmeadow, Robertville, and Steeledale. The firms that manufacture spices, sauces and condiments range from large firms that pack for multinationals and produce private label brands to smaller firms that produce their own brand of spices and condiments.

Sugar confectionery is the third largest sector with 12 firms across 28 nodes. These firms are also spread across a number of nodes with no singe node having a significant concentration of firms. The nodes with the highest concentration of sugar confectionery firms are Nancefield, with 3 firms, and Booysens with 2 firms. The firms mostly manufacture hard sweets and chewing gum.

Johannesburg also has quite a larger number of ice cream and edible ice manufacturers, at a total of 7 firms. These manufacturers are located in Amalgam, Booysens Reserve, Cleveland, Honeydew, Modderfontein, Robertville, and Strijdom Park. The full range of processed food products manufactured within the City of Joburg are reflected in Table 4 in the appendix.

5.1 Potential for food processing clusters within the City of Joburg

A number of potential clusters emerge from an initial review of the survey data. These will be explored in more detail through in-depth interviews to establish interest and level of organization of the various groups. The possible clusters that will be explored are:

1. **A Halaal Foods Cluster in Anchorville:** There is already a number of firms that produce Halaal-certified food within the Lenasia/Anchorville area. These firms manufacture a range of products, including baked goods such as bread, biscuits, and pastries, condiments, spices, and edible vegetable oil. As part of the cluster initiative, an initial market-sizing exercise will be conducted to establish the potential demand for Halaal products within the southern African region.
2. **A geographic cluster in Kya Sand:** Kya Sand has the highest concentration of food processing companies of all nodes in Joburg. It is also a relatively organized node that has a business association responsible for addressing issues of mutual interest to all businesses within the node. An initial interview will be conducted with the business association to gauge the level of interest for a cluster initiative. A potential challenge with a geographic cluster in the Kya Sand node is the fact that the food processing firms are spread across a range of subsectors, including baking, nut butters, snacks, baby food, and flavours. During interviews, we will evaluate whether there are any common issues across these firms (such as common inputs, for example) that may indicate potential benefit from a cluster initiative.
3. **A sauces, spices and condiments cluster:** The final option would be to consider developing a cluster in a sector that has a large number of firms across the City, and where there are opportunities for exports across the southern African region (section 4.1.). Baked goods (which seems to be largely biscuits) may be a less viable option than spices, sauces and condiments that have a longer shelf-life. The challenge with arranging a cluster amongst these firms is that they are spread across the City and are

not, at present, organized into a collective in any way. A cluster initiative would thus have to be preceded by establishing some organization or grouping amongst these firms, based on their mutual interest. This may be a lengthy process.

Over the next four weeks, the team will conduct interviews in line with the potential clusters identified above.

6 Appendix A

Table 4: Food products manufactured within the City of Joburg

Node Name	Company name	Firm Classification (main classification)	Further detail (products)
Amalgam	Candy Connexion cc	Sugar confectionery	Sweets
	Fresh Kool Ice Cream and Dairy Products Manufacturers (Pty) Ltd	Ice cream and Edible Ice	Ice cream
	Il -Molino cc	Baked Goods	Flour
Anchorville	Africa Vinegar CC	Spread, Sauces, Spices and Condiments	Vinegar
	Yunma Foods cc	Baked Goods	Flour
	Sundew Food Manufacturer CC	Beverages	Essences/flavours (Rose water, ice-cream powders), Beverages (Cold drink cordials, Dairy-based beverages), Syrups, and Vinegar (Condiments)
	Golden Foods	Baked Goods	Samoosas, pies, spring rolls
	Golden Fry	Vegetable oil	
Benrose	The Fortune Cookie Factory	Baked Goods	Fortune cookies
	Morning Bakery	Baked Goods	Bread
	Pine Creek Flour Mills	Flour	
Booysen Reserve	Wingson Manufacturing Co	Spread, Sauces, Spices and Condiments	Vinegar
	Citrashine	Fruit & Vegetable coatings	
	Dream Candy Sweets Manufacturers	Sugar confectionery	
	Joy Lolly	Ice cream and Edible Ice	
	Food Makers	Frozen food (ready meals)	Over 400 products including snacks, meals, desserts, pastries, sauces etc.

Booysens/Reuven/ Ophirthon	Soft spreads	Spreads and condiments	Includes jams, peanut butter, honey, and syrup. Supplies trade and packs house brands
	Marios Cones Conibarone	Baked Goods	Ice cream cones, mallow cones, wafers
	Eyakho Prducts	Sauces and condiments	Tomato Sauce, Vinegar etc.
	Fresh Earth	Baked Goods	Gluten free bread rolls, pizza bases etc.
	Fu Chen Food	Baked Goods	Spring rolls and spring roll pastries
	Cloud Nine Candies	Sugar confectionery	
	Rich Products	Baked Goods	Bakery goods, topping and icing products
	Uber Nutrition	Sugar Confectionery	Snack bars, shakes and supplements
City Deep	Americandy Manufacturers	Sugar confectionery	
	Giant Canning	Canned food	Canned soup, spaghetti, mixed vegetables and jam
	Selona International A.C.T. (Pty) Ltd	Vegetable fat & oil	Palm fat, margarine, palm kernel olien, palm oil, powder fat, etc
Cleveland	Vita Freeze cc	Ice cream and Edible Ice	
	Kayleys Belgian Chocolate	Sugar confectionery	
	Ribas Manufactures	Sauces and condiments	
Devland	Goldencrest Products	Dry prodcts (Lentils, beans, maize, peas)	Spices
	Tommy Unibisco	Baked Goods	Biscuits
	My Kreemer Manufacturers	Milk Powders	
	National Pride Golden Syrup	Sugar Syrup	
Honeydew	Tribe Vibe Products	Baked Goods	Sugar Confectionery
	Alette's Rusks	Baked Goods	
	Tendercut (Pty) Ltd	Meat & Fish	
	Hubertos Ice Cream	Ice cream and Edible Ice	
	The Flavour Lab	Sauces, spices, condiments	
	Solo Foods	Baked Goods	
	Milestone Beverage	Spreads and condiments	

Kya Sand	Eggtech pty ltd	Baked Goods (inputs)	Manufactures egg products used in baking, sauces, mayonnaise etc.
	Jozi Nut Butter	Sauces and condiments	Social enterprise; small scale artisinal manufacturing of specialist nut butters.
	Lupo Bakery	Baked goods	Ciabatta and other Italian bread
	Just-In-Thym Trading cc	Sauces and condiments	Nut butters. Also manufactures juices.
	Spice Girls	Spices and condiments	Curry, seasoning and stock
	Corpven Trading cc T/A Doppio Foods	Baked Goods	Bread and Cakes
	Albany	Baked Goods	
	Berliner Continental Butchery and Bakery	Baked Goods	Butchery
	Paul's Muesli	Cereals	Manufacture muesli, oats, biscuits
	Nutriseed	Snacks	Seed snacks (e.g. seed bars)
	Datex International Trading	Catering food products	
	Panciera Confectioners cc	Baked goods	
	Royal Harvet Foods	Snacks	Pop corn snacks
	Orchard baby and Toddler Food	Baby food	
	E&E Cheese Manufacturing cc t/a Pilaros Cheese	Cheese and dairy products	
	Cheryl Amy Jones	Baked goods	Cakes and pastries
	Season to Season	Flavours	
Kyalami	COSMA	Flavours	
	Wholesale Meat Services	Meat	
	Flavour Sensations	Flavours	
	DF Bakery	Baked goods	Bread, pastries
	Decadence Cakes, Cupcakes & Confectionery	Baked goods	
Lanseria	Bettafresh Prepared Foods (now BM Food Manufacturers)	Sauces and condiments	Foodservice products, including industrial scale sauces and condiments
Linbro Park b	Givaudan - Roure (Pty) Ltd	Flavours	
Longmeadow	Bidvest Food Ingredients	Sauces, spices, condiments	
	La Marina Foods	Sauces and condiments	

Modderfontein	Jenner's Pies pty ltd	Baked goods	
	Wicked Cream	Ice cream and Edible Ice	
	New Era Chickens	Poultry	
Nancefield	Z ad Z Foods cc	Baked goods	Biscuits
	Honey Comb Sweets	Sugar confectionery	
	Tasim Snacks cc	Snacks	
	Rainbow Pops cc	Sugar confectionery	
	Galaxy Biscuits	Baked goods	Biscuits
	V&A Tasty Treats cc	Snacks	
	K.J Foods cc	Baked goods	Bread and Cakes
Robertsham	Tip Top Meat Products cc	Meat	
	Retailer Brands	Spices, sauces and condiments	
	B & B wholesalers	Fish	
	F.F. Meat Products	Meat	
	Deli Food Services	NA	
	Dickon Hall Foods	Baked goods (inputs)	
Robertville	Aldor Africa	Sugar confectionery	
	TJS Food Manufacturing	Snacks	Chips, puffed corn and flavoured popcorn
	Simba Group Ltd	Snacks	
	TJ's Snacks	Spices and condiments	
	Spice Land	Spices	
	Multi-Fine Products	Condiments	Pickles
	Rosehill Foods	Cereal	
	Polar Ice Cream	Ice cream and Edible Ice	
	Technifood Marketing	Vegetable fat & oil	
Selby	Golden Spices	Spices, sauces and condiments	
	Brooklyn Foods	Baked goods	Bagels, bread, pretzels, panini etc
	Farm Fresh Fruit Juice and Yogurt	Beverages (Dairy-based beverages, Fruit juice)	
	BT Enterprises (PTE Spice Factory)	Spices	

Steeledale	Mr Sauce	Sauces and condiments	
	Evajo Manufacturing	Baked goods	
	Deli Sauces	Sauces and Condiments	
	Givaudan SA ltd	Flavour	
Strijdom Park	Tia's	Cereal	
	Seeman's Quality Meats	Meat	
	Ace Nut Traders cc	Snacks	
	Food Boys	Baked goods	Desserts (ready made)
	Foodspec M	Flavours	
	Maizeman	Pet food	
	Ice- Cream co	Ice cream and Edible Ice	
	Euro chocolates cc	Confectionary (with Cocoa)	