

Sports Drinks in South Africa

January 2025

Table of Contents

Sports Drinks in South Africa - Category analysis

KEY DATA FINDINGS

2024 DEVELOPMENTS

Several new brands enter sports drinks to intensify competition Energade remains leading brand, but is challenged Prime Hydration sees significant price drop

PROSPECTS AND OPPORTUNITIES

Stagnant demand for sports drinks over the forecast period Ingredients to be increasingly scrutinised by consumers and health associations Product label regulation changes expected, with manufacturers needing to adapt

CATEGORY DATA

Table 1 - Off-trade Sales of Sports Drinks: Volume 2019-2024Table 2 - Off-trade Sales of Sports Drinks: Value 2019-2024Table 3 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024Table 4 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024Table 5 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024Table 6 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024Table 7 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024Table 8 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2024Table 9 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029Table 10 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029Table 11 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029Table 12 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

Soft Drinks in South Africa - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture 2024 key trends Competitive landscape Retailing developments Foodservice vs retail split What next for soft drinks?

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024 Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024 Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024 Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024 Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024 Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024 Table 19 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024 Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024 Table 21 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024 Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024 Table 23 - Off-trade Sales of Soft Drinks by Category: % Volume Growth 2019-2024 Table 24 - Off-trade Sales of Soft Drinks by Category: % Volume Growth 2019-2024 Table 25 - Sales of Soft Drinks by Category: % Value Growth 2019-2024 Table 26 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024 Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024 Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024 Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024 Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024 Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024 Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024 Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024 Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024 Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024 Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024 Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024 Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024 Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024 Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029 Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029 Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029 Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029 Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029 Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029 Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029 Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029 Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029 Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

Fountain sales in South Africa

DISCLAIMER

SOURCES

Summary 1 - 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/sports-drinks-in-south-africa/report.