



# Soft Drinks in South Africa

November 2025

Table of Contents

## EXECUTIVE SUMMARY

Soft drinks sees moderate volume growth as affordability and investment shape performance

## KEY DATA FINDINGS

Soft drinks sees moderate volume growth as affordability and investment shape performance

## INDUSTRY PERFORMANCE

Advancements in production supports growth, while consumers focus on affordability

Premiumisation and sustainability remain key trends in soft drinks

E-commerce boosts engagement, and brands respond to anticipated sugar tax

## WHAT'S NEXT?

Rising sales, sugar tax and new labelling requirements

Health and wellness trends will have continued impact on development

Distribution to become increasingly digital

## COMPETITIVE LANDSCAPE

Coca-Cola holds on to number one spot

International players dominate while local brands gain ground

## CHANNELS

Supermarkets leads as e-commerce rises fastest

Off-trade accounts for highest proportion of volume sales

## MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## APPENDIX

Fountain sales in South Africa

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

[Bottled Water in South Africa](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Bottled water sees sustained demand as water security concerns and affordability shape behaviour

### INDUSTRY PERFORMANCE

Complex water issues support sales in bottled water

Still bottled water sees growth fuelled by promotions and accessibility

### WHAT'S NEXT?

South Africa's water scarcity ensures continued demand for bottled water

SANBWA improves efficiency and waste control in water use

Stricter guidelines enhance consumer trust in bottled water products

### COMPETITIVE LANDSCAPE

Coca-Cola remains leading company while AQuelle heads up brands

Private label players gain greater ground

### CHANNELS

Supermarkets as preferred channel for bottled water purchases

Retail e-commerce rises fastest

### CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

## Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

#### Carbonates in South Africa

##### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Carbonates sees rising volumes as pricing, distribution and reduced sugar variants underpin performance

##### INDUSTRY PERFORMANCE

Production and pricing strategies ensure continued growth for carbonates in South Africa

Non-cola carbonates sees fastest rise

##### WHAT'S NEXT?

Pricing to remain key to success

AI to have greater role in category development

Health trends will continue to shape progress

##### COMPETITIVE LANDSCAPE

Coca-Cola continues to dominate

PepsiCo benefits from acquisition

##### CHANNELS

Supermarkets leads distribution and sees further growth in 2025

E-commerce as fastest-rising channel

##### CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

#### Concentrates in South Africa

##### KEY DATA FINDINGS

## 2025 DEVELOPMENTS

Concentrates sees rising demand driven by affordability, with liquid formats outperforming

## INDUSTRY PERFORMANCE

Liquid concentrates leads growth through convenience and versatility

Powder concentrates suffers from low innovation

## WHAT'S NEXT?

Low-cost nature of concentrates should see sales rise during forecast period

Mobile commerce and social media trends to have growing impact

Potential legislative developments may hinder progress

## COMPETITIVE LANDSCAPE

Bromor maintains overall leadership of concentrates in 2025

Private label sees further expansion

## CHANNELS

Supermarkets channel benefits from promotions and accessibility

E-commerce caters to convenience demand through delivery and subscription

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

## CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Juice in South Africa](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Juice sees volume recovery as prices stabilise and 100% juice leads growth

Prices stabilise, supporting volume growth for juice in 2025

100% juice drives overall growth

### WHAT'S NEXT?

Natural trend will continue to benefit juice

Digital development and functional positioning inform innovation

Sustainability set to accelerate

## COMPETITIVE LANDSCAPE

Clover continues to lead through Clover Krush brand

Private label sees further expansion

## CHANNELS

Supermarkets leads distribution thanks to broad and convenient offer

E-commerce benefits from wide selection and frequent promotions

## CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[RTD Coffee in South Africa](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

RTD coffee sees rising interest but remains constrained by affordability

## INDUSTRY PERFORMANCE

Rising sales for RTD coffee in 2025

On-the-go trends spurs new launches

## WHAT'S NEXT?

Struggles ahead for RTD coffee in South Africa

E-commerce and tech advancements to inform innovation

Health awareness will accelerate shift towards reduced sugar options

## COMPETITIVE LANDSCAPE

Major players offer iced variants

Brands battle for attention as high prices deter local consumers

## CHANNELS

Supermarkets as preferred channel for RTD coffee purchases

Forecourt retailers sees slowed growth amid rising competition

## CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

- Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
- Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
- Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
- Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
- Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030
- Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030
- Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### RTD Tea in South Africa

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

RTD tea sees modest rises as health trends favour rooibos and kombucha

#### INDUSTRY PERFORMANCE

RTD tea struggles with low volume growth in 2025

Kombucha continues to attract attentions

#### WHAT'S NEXT?

Functional offerings set to drive growth in forecast period

Digital developments will shape category progress

Health and wellness trends will continue to accelerate

#### COMPETITIVE LANDSCAPE

Lipton brand leads through appealing flavours

Kombucha trend supports growth for specialist company

#### CHANNELS

RTD tea sees most success in supermarkets

Third-party platforms and players' own sites expand, supporting rise in e-commerce distribution

#### CATEGORY DATA

- Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025
- Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025
- Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025
- Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025
- Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025
- Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025
- Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025
- Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025
- Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025
- Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030
- Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030
- Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030
- Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### Energy Drinks in South Africa

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Energy drinks sees rapid rises as convenience and fitness trends strengthen

## INDUSTRY PERFORMANCE

Convenience demand and rising interest in fitness support sales in energy drinks in 2025

Consumers shift towards reduced sugar options

## WHAT'S NEXT?

Collaborations with sports teams will boost visibility and engagement

Smart manufacturing set to streamline production processes

Packaging will see greater investment in sustainability

## COMPETITIVE LANDSCAPE

Coca-Cola's Monster Energy brand maintains overall leadership

Low-cost Score brand soars ahead

## COMPETITIVE LANDSCAPE

Supermarkets maintains distribution lead thanks to extensive reach and promotional strategies

E-commerce rises through strong presence of healthy and functional variants

## CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Sports Drinks in South Africa](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Sports drinks sees strong volume gains as fitness culture expands

## INDUSTRY PERFORMANCE

Strong volume growth for sports drinks amid accelerating fitness trends

Sponsorships boost visibility and sales

## WHAT'S NEXT?

Increased interest in exercise ensures continued growth during forecast period

Digital development will spur innovation and expansion

Ingredients to be increasingly scrutinised by consumers and health associations

## COMPETITIVE LANDSCAPE

Bromor leads through popular Energade brand

Isofit gains ground as it challenges stronghold of established players



## CHANNELS

Shoppers buy their sports drinks mainly from supermarkets

E-commerce continues to post robust rises

## CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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