



Euromonitor
International

Soft Drinks in South Africa

November 2025

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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

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Supermarkets leads as e-commerce rises fastest

Off-trade accounts for highest proportion of volume sales

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WHAT'S NEXT?

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Sustainability set to accelerate

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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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

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RTD Tea in South Africa

KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

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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
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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

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[Sports Drinks in South Africa](#)

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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

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