

SOUTH AFRICAN SPORTS & ENERGY DRINKS INDUSTRY LANDSCAPE REPORT

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COMPANY OVERVIEW



Insight Survey is a boutique South African market research agency with over 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

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- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
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Competitor pricing research



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We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



REPORT OVERVIEW

The **South African Sports and Energy Drinks Industry Landscape Report (106 pages)** provides a dynamic synthesis of industry research, examining the local and global **Sports and Energy Drinks industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges, manufacturer/distributor overview, flavour, and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Sports and Energy Drinks Industry Section:

- What are the current market dynamics of the Global Sports and Energy Drinks industry?
- Which are the key markets within the Global Sports and Energy Drinks industry?
- What are the latest industry trends, innovation and technology, drivers, and challenges?

For the South African Sports and Energy Drinks Industry Section:

- What are the current market dynamics (market size, market value, and market volumes): 2018-2023 Actual, 2024-2028 Forecasts, and distribution channels?
- What are the key industry trends, innovation and technology, drivers, and challenges?

For the South African Sports and Energy Drinks Manufacturer & Distributor Section:

- Which are the key manufacturing and distributor players in the South African Sports and Energy Drinks industry?
- For each key player, what is the latest company news in terms of products, services, new launches, and marketing initiatives?
- Which popular Sports and Energy Drinks brands and products do the respective companies manufacture/distribute?

For the South African Sports and Energy Drinks Flavour and Pricing Analysis Section:

- What are the current Sports and Energy Drink flavour trends and prominent Sports and Energy Drink flavours in the local market?
- What are the prices of popular Sports and Energy Drink brands across South African retail outlets?

SCREENSHOTS FROM REPORT

106-page report filled with detailed charts, graphs, and insights



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The global Energy and Sports Drinks market is expected to reach a value of approximately US\$211.6 billion in 2024*, in terms of revenue, and is predicted to grow at a compound annual growth rate (CAGR) of 4.4%, to reach an estimated value of approximately US\$262.5 billion in 2029*, as illustrated in the adjacent graph.

- The current and expected growth of the market is being driven by increased demand for healthier and functional Energy Drinks products as consumers place greater emphasis on their health and wellbeing. With this, many consumers are turning to Energy Drinks to increase energy and physical performance, thereby driving the market.
- Additionally, increasingly busy consumer lifestyles are driving growth of the Energy Drinks market, due to these products' ability to provide a convenient, time-saving way for consumers to increase energy and focus. Furthermore, the introduction of Energy Drink products specifically targeting women is a further factor driving the market, by catering to increased demand for Energy Drinks from female consumers.
- However, the market is facing several challenges, including regulatory restrictions, which focus on limiting caffeine content, as well as protecting vulnerable populations, such as minors. Moreover, concerns regarding the negative health effects of Energy Drinks are adversely affecting perceptions of these products, whilst competition from other beverages categories, such as instant powder hydration and other functional beverage products, are also posing a challenge.

- In terms of segmentation, the global Sports Drinks market can be segmented by product type and packaging type. By product type, Sports Drinks are segmented into Hypertonic, Isotonic, and Hypotonic, with the Isotonic segment accounting for the majority of the market share due to its ability to quickly replace electrolytes and provide hydration.
- In terms of packaging type, the market is segmented into Bottle (PET/Glass), Can, and Others, with the Bottle segment holding the largest share. This segment is also expected to US\$60.3 billion by 2032, at a CAGR of 3.3% from 2024 to 2032.
- The global Energy Drinks market can be segmented by product, product type, and packaging type. In terms of product, the market is segmented into Alcoholic and Non-Alcoholic, with the latter holding the largest share. In terms of product type, the market is segmented into Non-Organic and Organic, with Non-Organic being the largest in 2023.
- Finally, in terms of packaging type, the Energy Drinks market can be segmented into Bottles (PET/Glass), Cans, and Others, with the Bottles segment holding the largest market share.

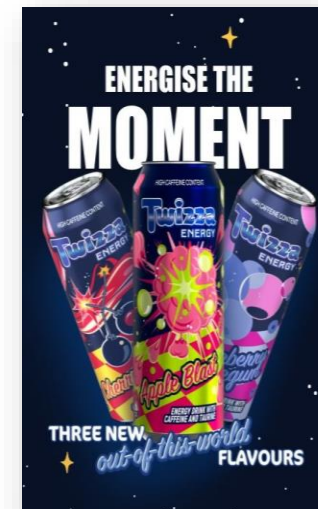


*Forecast

Fruit Flavours Trend in the South African Energy Drinks Market

- In South Africa, fruit flavoured Energy Drinks have emerged as a significant trend over the past year, as a result of the growing interest in health and wellness throughout the country. This trend is being fuelled by the release of new fruity flavours by market players to cater to consumers' evolving taste preferences.
- More specifically, new flavour innovations in the Energy Drinks market are attracting health-conscious consumers, as companies are incorporating natural and healthy ingredients. Fruit flavours in particular are gaining traction locally, as these are often seen as healthier options compared to artificial flavours, resulting in a prominent trend in the local Energy Drinks market.
- As an example, Twizza, a leading South African beverage company, has recently released three new 'out of this world' variants to its Energy Drink range, all incorporating fruity flavours. These new flavours include Apple Blast, Blueberry Bubblegum, and Cherry Bomb, with the brand highlighting the new flavours through interesting taglines, such as 'bored of those other energy flavas?'.
- Switch Energy also expanded its Energy Drinks range with the introduction of four new flavours, three of which incorporate fruity notes and combinations. The new lineup of fruity flavours includes two sugar-free options, namely Granadilla & Gooseberry and Dragonfruit & Berries, as well as a new classic Pink Lemonade flavour.

- Similarly, Energade added three new fruity flavours to its Energade Boost Energy Drink range. These fruity flavours include Passion Blast, Berry Burst, and Strawberry Surge.
- Furthermore, in December 2023, the popular local Energy Drinks manufacturer, Dragon Energy, introduced its Mavrik Energy Drink range. This range features two fruit flavour varieties, including Mavrik Blizzard, which boasts a peach punch flavour, and Mavrik Storm, featuring a cherry-berry flavour.
- Therefore, the trend of new fruity flavours within the local Energy Drinks market is set to continue to grow, as part of meeting consumer demand for natural and healthy ingredients. This is resulting in the release of a range of fruity flavours, as part of efforts to cater to health-conscious consumers, making this a trend likely to continue into the future.



SAMPLE FROM REPORT

SA INDUSTRY INNOVATION AND TECHNOLOGY

Checkers and UFC Champion Dricus du Plessis Introduce KNOX Hydrate Range

- In August 2024, UFC Middleweight Champion, Dricus du Plessis, partnered with Checkers to launch KNOX Hydrate, a range of sparkling Sports Drinks.
- KNOX Hydrate is designed to provide sports athletes with hydration, replenishment, and recovery, as well as an energy boost after strenuous activity. In terms of formulation, the new range of Sports Drinks is caffeine-free and low in kilojoules, and contains essential vitamins, minerals, electrolytes, amino acids and branched-chain amino acids (BCAAs).
- Additionally, the range consists of five flavours, including Lemon Lime, Blue Raspberry, Strawberry Watermelon, Orange Naartjie, and Peach.



Kuvuka Expands Product Offering with New Isotonic Sports Drinks Range

- In August 2024, Kuvuka, a spring bottled water manufacturer, extended its offering with the launch of its new isotonic Sports Drinks range. This product range is specifically designed for peak performance and recovery, with a range of unique flavours.
- In particular, the new isotonic Sports Drinks range consists of five flavour varieties, namely Lime Zing, Power Punch, Tropical Blast, Strawberry Surge, and a sugar-free Cherry Charge flavour.
- Furthermore, the range is formulated with glycine for muscle repair, a B vitamin complex, and vitamin C for energy and immune support, as well as the brand's pure spring water.



SAMPLE FROM REPORT

RED BULL: COMPANY NEWS AND BRANDS/PRODUCTS



Red Bull South Africa Reveals Finalists for its 'Dance Your Style' Competition

In September 2024, Red Bull South Africa announced the sixteen finalists who will compete in the national finals of the Red Bull 'Dance Your Style' competition in Gqeberha, Eastern Cape. More specifically, the winner will represent South Africa at the international finals in India, and the dancers will compete in a one-on-one battle format, with the audience determining the winner. *(3 September 2024)*



Red Bull South Africa Announces Winners of 'Red Bull Quicksand' Race

In August 2024, Red Bull South Africa announced the winners of its 'Red Bull Quicksand' race. More specifically, Nkosikhona Mhlakwanan and Dayna Deeble emerged as champions in their respective divisions. The challenging one-mile time trial took place on Durban's Golden Mile, featuring impressive 10-metre-high sandcastles that formed the course. *(17 August 2024)*



Red Bull South Africa Announces 'Formula One Car Showrun' in Sandton

In June 2024, Red Bull South Africa announced that the 'Formula One Oracle Red Bull Racing's RB7', driven by David Coulthard, will be showcased at a special event in Sandton City, Johannesburg, in October 2024. Specifically, the RB7 achieved remarkable success in 2011, securing numerous victories and contributing to the team's championship wins. *(13 June 2024)*



Red Bull Symphonic Blends Amapiano and Orchestra in South Africa

In June 2024, the Red Bull Symphonic made its South African debut, featuring a groundbreaking performance that combined Amapiano music with classical orchestration. The event, which sold out quickly and added a second night due to high demand, showcased Kabza De Small's Amapiano tracks reimagined with a 33-piece symphonic orchestra and choir. *(10 June 2024)*



Red Bull South Africa Announces Winner of 'Red Bull Kumite Qualifier'

In May 2024, Red Bull announced Mark Moonsamy as the winner of the 'Red Bull Kumite Qualifier'. More specifically, the event took place at 'Comic Con Cape Town' and involved 128 players competing. Furthermore, Mark Moonsamy, also known as 'MarkTheShark', will represent South Africa in the upcoming 'Red Bull Kumite 2025' international competition. *(1 May 2024)*



Red Bull South Africa Hosts 'Car Park Drift' Competition

In April 2024, Red Bull hosted its 'Car Park Drift' competition at Suncoast Arena in Durban, where Jim McFarlane secured his third title with impressive precision and control. Additionally, the event featured exciting performances, including an aerial show by Pat Davidson, and a display by local spinners 'Team Sidewayz', drawing a sold-out crowd of 2,500 spectators. *(15 April 2024)*

IMAGE	BRAND/PRODUCT
	Red Bull Editions: An Energy Drink that contains high levels of caffeine, B vitamins, taurine, and sugar. This product is available in five flavours, including Watermelon, Coconut And Berry, and Cactus Fruit, amongst others.
	Red Bull Energy Drink: An Energy Drink that contains high levels of caffeine, B vitamins, taurine, and sugar. Additionally, each 250ml can of Red Bull contains 80mg of caffeine.
	Red Bull Sugarfree: A sugar-free Energy Drink that contains caffeine, B vitamins, and taurine. Additionally, the product contains non-calorie sweeteners, such as sucralose and acesulfame K, as sugar substitutes.



SAMPLE FROM REPORT

SA ENERGY DRINKS PRICING ANALYSIS

BRAND AND SIZE			Checkers	makro	Pick n Pay	SPAR	Woolworths
Bioplus Energy Drink		440ml	R21.99	R17.95	R21.99	R19.99	N/A
Dragon Energy Drink		500ml	R13.99	N/A	R13.99	R12.99	N/A
Dragon Energy Drink Sugar-Free		500ml	R13.99	N/A	R13.99	R12.99	N/A
Energade Boost		440ml	N/A	R11.95	R16.99	R14.99	N/A
		4 x 440ml	N/A	R44.95	R62.99	N/A	N/A
Go Energy Drink		500ml	R10.99	N/A	N/A	N/A	N/A
Lucozade		360ml	R22.99	R17.45	R19.99	R20.99	R19.99
		500ml	R29.99	R24.25	R23.99	R25.99	R20.99

This pricing analysis was conducted at retail stores and supermarkets during w/c 26 August 2024.

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