



SOUTH AFRICAN CARBONATED SOFT DRINKS (CSD) 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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QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



OUR RESEARCH SOLUTIONS



Competitor pricing research



Store visits and store checks



Competitor interviews



Customer interviews



Company website analysis



Governmental held records

OUR FOOD AND BEVERAGE EXPERIENCE

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 Carbonated Soft Drinks Industry Landscape Report (122 pages)** provides a dynamic synthesis of industry research, examining the local and global **Carbonated Soft 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, retail, and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Carbonated Soft Drinks Industry Section:

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

For the South African Carbonated Soft Drinks Industry Section:

- What are the current market dynamics (market size, market value, market volumes, imports and exports trade): 2018-2023 Actual, 2024-2028, and distribution channels?
- What are the latest South African Carbonated Soft Drinks industry trends, innovation and technology, drivers and challenges?

For the South African Carbonated Soft Drinks Manufacturer & Distributor Section:

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

For the South African Carbonated Soft Drinks Flavour, Retail, and Pricing Analysis Section:

- What are the current CSD flavour trends and prominent CSD flavours in the local market?
- Which are the CSD products among key retail players (retail house brands) in the South African Carbonated Soft Drinks industry?
- What are the prices of popular CSD brands across South African retail outlets?

SCREENSHOTS FROM REPORT

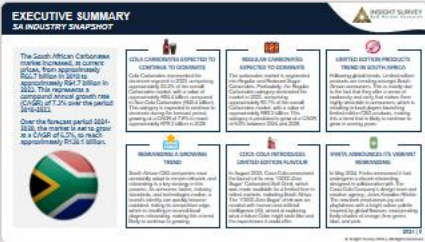
122-page report filled with detailed charts, graphs, and insights



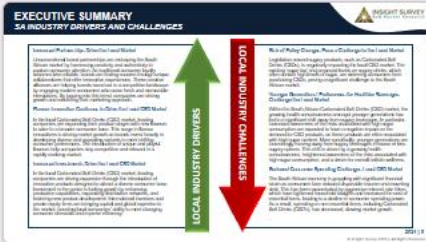
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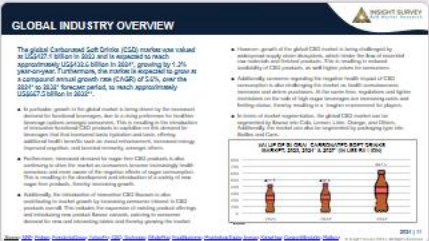
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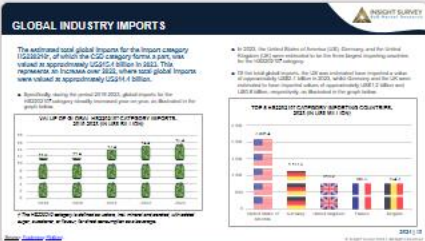
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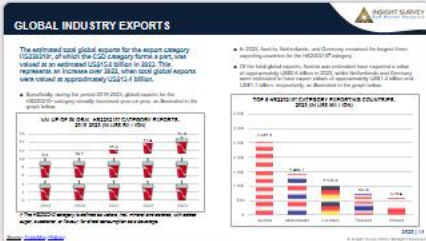
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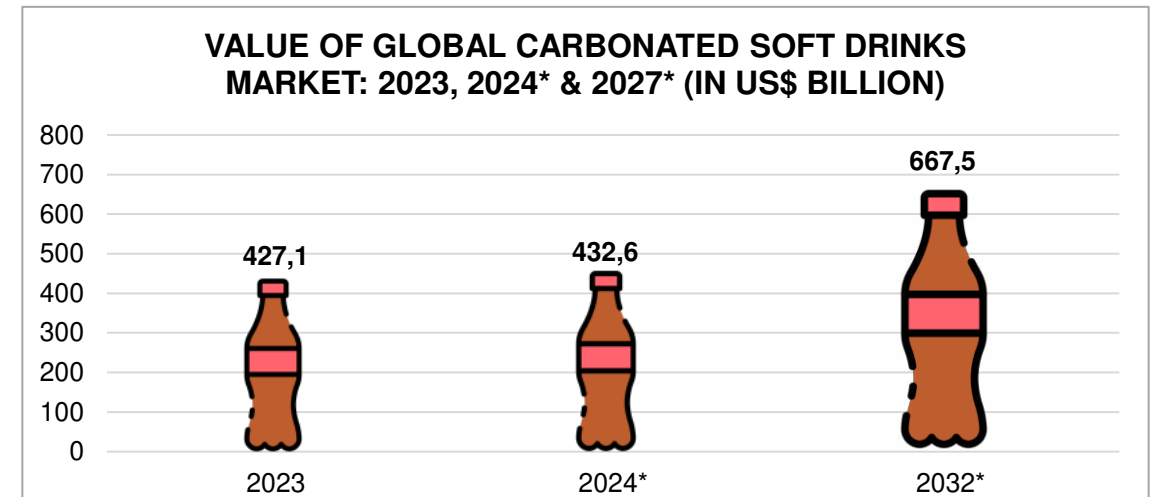
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GLOBAL INDUSTRY OVERVIEW

The global Carbonated Soft Drinks (CSD) market was valued at US\$427.1 billion in 2023 and is expected to reach approximately US\$432.6 billion in 2024*, growing by 1.3% year-on-year. Furthermore, the market is expected to grow at a compound annual growth rate (CAGR) of 5.6%, over the 2024* to 2032* forecast period, to reach approximately US\$667.5 billion in 2032.**

- In particular, growth in the global market is being driven by the increased demand for functional beverages, due to a rising preference for healthier beverage options amongst consumers. This is resulting in the introduction of innovative functional CSD products to capitalise on this demand for beverages that transcend basic hydration and taste, offering additional health benefits such as mood enhancement, increased energy, improved cognition, and boosted immunity, amongst others.
- Furthermore, increased demand for sugar-free CSD products is also continuing to drive the market as consumers become increasingly health conscious and more aware of the negative effects of sugar consumption. This is resulting in the development and introduction of a variety of new sugar-free products, thereby increasing growth.
- Additionally, the introduction of innovative CSD flavours is also contributing to market growth by increasing consumer interest in CSD products overall. This includes the expansion of existing product offerings and introducing new product flavour variants, catering to consumer demand for new and interesting tastes and thereby growing the market.

- However, growth of the global CSD market is being challenged by widespread supply chain disruptions, which hinder the flow of essential raw materials and finished products. This is resulting in reduced availability of CSD products, as well higher prices for consumers.
- Additionally, concerns regarding the negative health impact of CSD consumption is also challenging the market as health consciousness increases and deters purchases. At the same time, regulations and tighter restrictions on the sale of high-sugar beverages are increasing costs and limiting choice, thereby resulting in a tougher environment for players.
- In terms of market segmentation, the global CSD market can be segmented by flavour into Cola, Lemon, Lime, Orange, and Others. Additionally, the market can also be segmented by packaging type into Bottles and Cans.



* Forecast

Limited Edition Products Trend in South Africa

- Following global trends, Limited edition products are trending amongst South African consumers and in the local Carbonated Soft Drinks (CSD) market. This is mainly due to the fact that they offer a sense of exclusivity and rarity that makes them highly desirable to consumers, which is resulting in local players launching limited edition CSD products, making this a trend that is likely to continue to grow in coming years.
- More specifically, limited edition products are highly valued for the exclusivity they offer. By producing items in restricted quantities, brands generate a sense of rarity that enhances their appeal where this scarcity makes the products more desirable. The exclusivity associated with limited editions creates a feeling of privilege and distinction, driving demand and making these products more attractive to buyers.
- For example, Fanta, recently launched its limited-edition apple pie flavor CSD product, which features dessert-inspired flavours and a distinctive purple colour. This new variety has no added sugar and captures Fanta's vibrant spirit and continues the brand's tradition of encouraging a playful and adventurous outlook on life. The unique flavour has excited fans and reinforced Fanta's commitment to offering creative and engaging products.
- In addition, Coca-Cola has launched two limited edition CSD products, namely Coca-Cola Wozzaah, and Coca-Cola Y3000 Zero Sugar. Specifically, it is inspired by African culture and combines the classic Coca-Cola taste with vibrant tropical flavors reflective of Africa's rich cultural heritage.

- Additionally, Coca-Cola Y3000 was Created with both human and artificial intelligence and offers a futuristic taste experience. It features a zero-sugar formula and a design that imagines what Coca-Cola might taste like in the year 3000. The visual identity includes a light colour palette and morphing liquid design, reflecting a positive and optimistic future.
- Moreover, JIVE announced the launch of its new limited-edition JIVE Funny Flavoured CSD product. This release coincided with the annual 'JIVE Cape Town Funny Festival'.
- As the trend of limited edition CSD products in the market continues to grow, CSD companies are continuing to take advantage of this, in order to maintain clients and meet ongoing consumer demands. As such, limited edition CSD products will continue to trend in the South African CSD market.



Fanta Launches a New Mystery Flavour

- In September 2023, Fanta continued its '#WhatTheFanta' global campaign in the South African market. This campaign encouraged consumers to guess the flavour of a new limited-edition mystery-flavoured Fanta product.
- In particular, the company used the campaign to engage and interact with consumers, by challenging their senses and taste buds with contrasting flavours. This also included letting consumers join the conversation and guess the flavour on Fanta's digital and social media platforms to further boost engagement.
- This limited-edition mystery flavour was revealed in February 2024, by Fanta, to be Apple Pie. The new flavour was indicated to embody Fanta's vibrant spirit, creating a wave of excitement through its dessert-themed flavour containing no added sugar.



Coca-Cola Introduces New Limited-Edition Futuristic Flavour

- In August 2023, Coca-Cola announced the launch of its new 'Y3000 Zero Sugar' drink, which was made available for a limited time in select markets including the United States, Canada, China, Europe, and Africa. In South Africa, the product was indicated to be sold exclusively at Checkers stores.
- In terms of the new offering, the 'Y3000 Zero Sugar' drink was co-created with human and artificial intelligence (AI), aiming to reflect how consumers envision the future through emotions, aspirations, colours, and flavours. The goal was to explore what a future Coke might taste like and the experiences it could offer, aligning with Coca-Cola's 'Real Magic' brand.
- As part of the launch, consumers were encouraged to scan an on-pack QR code to access the Coca-Cola Creations Hub, where they could use the 'Y3000 AI Cam' to envision the future and explore the Y3000 capsule collection, featuring limited-edition items inspired by the year 3000.



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PURA BEVERAGE COMPANY: COMPANY NEWS AND BRANDS/PRODUCTS



PURA Beverage Company Sponsors The Room Key's Luxury Properties Competition

In April 2024, PURA Beverage Company sponsored The Room Key Luxury Properties' 'Ultimate Giveaway Getaway' competition. More specifically, the competition was prized at over R35,000 and included accommodation, travel products, food, and beverages. In particular, Pura Beverage Company sponsored the beverages, valued at R4,400. *(1 April 2024)*



PURA Beverage Company Partners with Forbes

In February 2024, PURA Beverage Company partnered with Forbes as its activation partner for the 'FORBES WOMAN AFRICA Leading Women Summit'. More specifically, the summit took place in Johannesburg at the Emperors Palace and Convention Centre, where a diverse group of influential and inspiring women, who gathered to share various insights. *(27 February 2024)*



PURA Beverage Company Promotes its Brand at 'INVEST CAPE TOWN'

In February 2024, PURA Beverage Company showcased its brand at the launch of 'INVEST CAPE TOWN'. This initiative emphasised and highlighted creators, innovators, and businesses in Cape Town, that are impacting the South African economy. Additionally, the event is focused on ensuring continued economic growth in the city, across several industries. *(13 February 2024)*



PURA Beverage Company Takes Part in the 'Natural Products Expo East' in the USA

In January 2024, PURA Beverage took part in the 'Natural Products Expo East' event, considered to be the premier industry event for natural, organic, and healthy products on the East Coast of the United States. More specifically, participating in this event offers Pura Beverage the opportunity to remain at the forefront of industry trends and consumer demand. *(7 July 2024)*



PURA Beverage Company Partners with Trash for Treat

In September 2023, PURA Beverage Company partnered with Trash for Treat, an educational programme that incentivises schoolchildren to collect recyclable waste, fostering positive environmental behaviours. More specifically, Pura Beverage donated 12,000 beverages to all schools that participated in this initiative in the Western Cape. *(13 September 2023)*

livealittle
PURA

IMAGE	BRAND/PRODUCT
	PURA Soda: A Carbonated Soft Drink range that contains less sugar, colourants, artificial sweeteners, and synthetic ingredients. This product is available in a variety of flavours, including pomegranate and cranberry, amongst others.



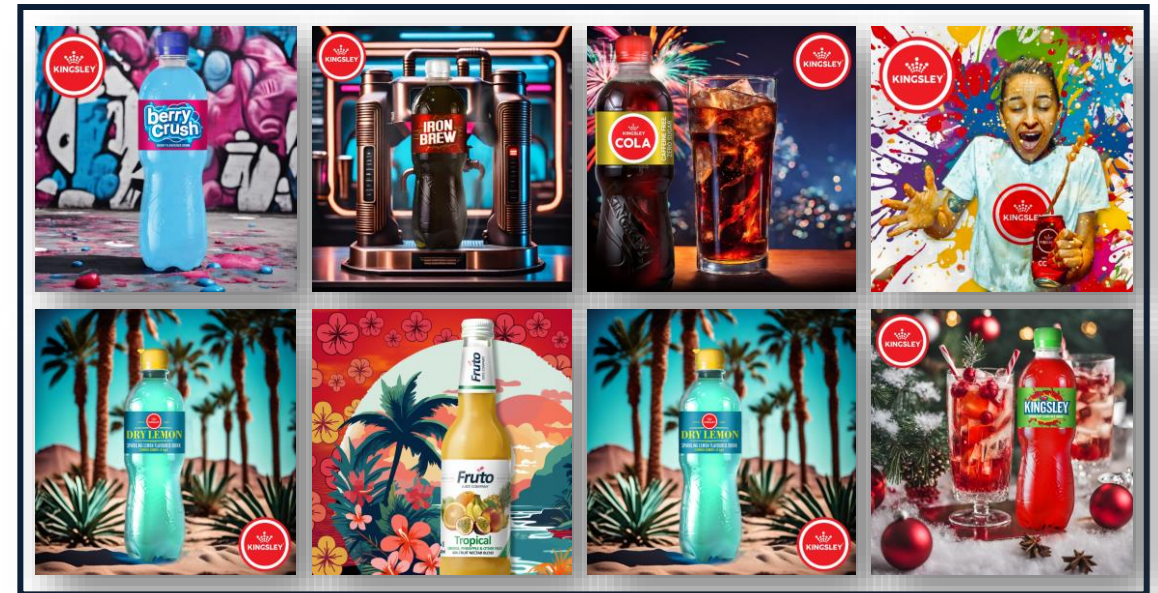
SAMPLE FROM REPORT

KINGSLEY BEVERAGES: MARKETING

Kingsley presents itself as a vibrant and engaging brand, distinguished by its emphasis on fun and lively aesthetics. Additionally, the brand aims to make high-quality Carbonated Soft Drinks accessible to a wide audience by positioning its offerings as an affordable choice, ensuring that great taste and value are within reach for its consumers.

- More specifically, Kingsley employs striking, bold, and vivid imagery that captures consumers' attention with its vibrant and colourful presentation. By incorporating dynamic bursts of colour in its design, the brand effectively mirrors the intense, refreshing flavour experiences its products offer, creating a visually stimulating representation that complements the sensory delight of its beverages.
- This strong focus on flavour is further emphasised through the brand's ongoing 'You got flavour' campaign, which is marketed heavily across its social media pages. The campaign can be seen on various social media posts throughout the past year.
- Furthermore, Kingsley frequently marketed its offerings during specific holidays, to keep the brand top of mind, as well as further its engagement with its consumers. This included a range of different products being promoted, to be enjoyed on special holidays.
- Kingsley also enhanced its social media positioning by incorporating various taglines tailored to each product in its promotional posts. For instance, when promoting its dry lemon beverage, Kingsley used the tagline '#ZestToImpress' to highlight the product's invigorating flavour.

- Moreover, for its Fruto product range, the brand utilised the tagline '#TropicalVibes' to evoke the refreshing and exotic nature of the beverages. These specific taglines not only help in creating a distinct identity for each product but also engage consumers by resonating with the unique qualities and experiences each product offers.



Kingsley Beverages' Social Media Following – w/c 05 August 2024



84,000



5,263



375



3,000

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