

INSIGHT SURVEY
Business growth delivered

**SOUTH AFRICAN
BOTTLED WATER
MARKET INSIGHTS REPORT**

Published: JANUARY 2026

COMPANY OVERVIEW

We are a South African, boutique market research agency with 20 years of experience, specialising in Business-to-Business (B2B) and Industry Research. We provide bespoke solutions to deliver business growth by ensuring you make smarter, data-driven decisions with reduced investment risk.



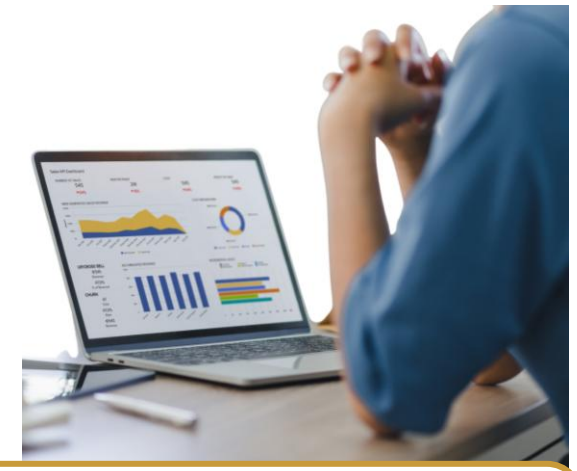
Bespoke B2B Market Research Solutions



We provide **actionable insights** that deliver **business growth through customised surveys and interviews** with B2B stakeholders and decision makers.



Market and Competitor Intelligence



Our **market intelligence services** will ensure that you always stay ahead of **highly competitive South African markets**.

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Our bespoke **Industry and Competitor Intelligence** can help give the **edge in a global marketplace**, empowering your business to overcome industry challenges quickly and effectively, and enabling you to **realise your potential** and achieve your vision. From **strategic overviews** of your business's competitive environment through to specific competitor profiles, our **customised Intelligence** is designed to **meet your unique needs**.

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 & BEVERAGE EXPERIENCE



THE *Coca-Cola* COMPANY



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



BECK FAMILY
ESTATES



The **South African Bottled Water Industry Landscape Report (52 pages)** provides a dynamic synthesis of industry research, examining the local and global **Bottled Water 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.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Bottled Water Industry Section:

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

For the South African Bottled Water Industry Section:

- What are the current market dynamics (market size, market value, and market volumes): 2019-2024 Actual, 2025-2029 Forecasts, and distribution channels?
- What are the latest South African Bottled Water industry trends, innovation and technology, drivers, and challenges?
- What are Porter's Five Forces shaping the South African Bottled Water market?
- What is the Steep analysis of the South African Bottled Water market?

SCREENSHOTS FROM REPORT

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



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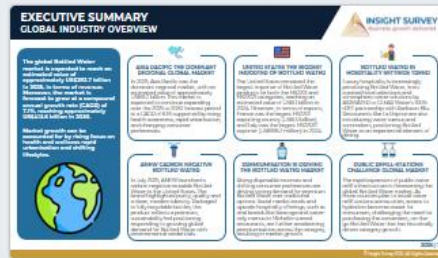
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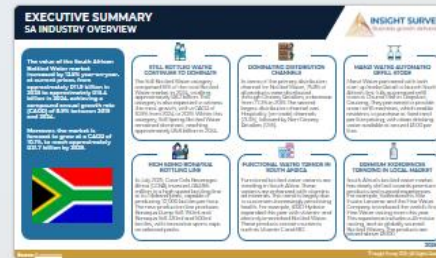
5



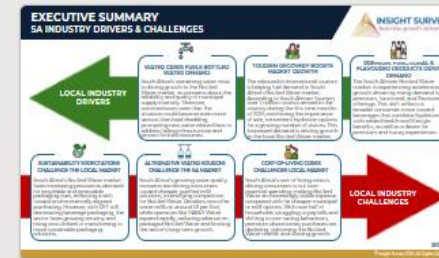
6



7



8



9



10



11



12



13



14



15

The South African Bottled Water market increased by approximately 12.5%, in terms of retail value RSP, from approximately R11.9 billion in 2023 to approximately R13.4 billion in 2024. Moreover, the market is predicted to grow at a compound annual growth rate (CAGR) of 10.1% for the 2024 to 2029 forecast period.

- Segmented by category, the South African Bottled Water market consists of Carbonated Bottled Water, Flavoured Bottled Water, Functional Bottled Water, and Still Bottled Water.
- Furthermore, the Carbonated Bottled Water and Still Bottled Water categories are further segmented into Carbonated/Still Natural Mineral Bottled Water, Carbonated/Still Spring Bottled Water, and Carbonated/Still Purified Bottled Water sub-categories. Additionally, the Flavoured Bottled Water category is further segmented into Still Flavoured Bottled Water and Sparkling Flavoured Bottled Water sub-categories.
- In terms of total retail value, the Still Bottled Water category continued to comprise the largest share of the market in 2024, valued at approximately R8.2 billion, representing 63.0% of the total Bottled Water market. Within this category, Still Spring Bottled Water remained the dominant sub-category, reaching a value of approximately R5.8 billion in 2024.
- The remainder of the Bottled Water market, in total value RSP terms, was made up of Carbonated Bottled Water (approximately R3.0 billion), Flavoured Bottled Water (approximately R1.8 billion), and Functional Bottled Water (approximately R423 million) in 2024.

- Additionally, the Still Bottled Water category is forecast to continue to dominate the Bottled Water market, with the category expected to grow at the highest CAGR of 10.9%, during the 2024 to 2029 forecast period, followed closely by Flavoured Bottled Water which is expected to grow at a CAGR of 9.9%.
- This predicted growth within the overall Bottled Water market can be attributed to water scarcity concerns throughout the country, as well as increased tourism and traveller concerns around the quality of tap water, which are driving more local and visiting consumers to purchase Bottled Water products as alternatives. In addition, there is a rising demand for new and innovative premium, functional, and flavoured Bottled Water products, which is driving growth in the local market.
- However, the local Bottled Water market is still facing various challenges that may hinder market growth, including changing consumer expectations around sustainability, threats from alternative water sources, and reduced spending power resulting from the cost-of-living crisis.



SAMPLE FROM REPORT

SA TRENDS, INNOVATION & TECHNOLOGY, DRIVERS AND CHALLENGES

TRENDS

PREMIUM EXPERIENCES & BOTTLED WATER PRODUCTS

- South Africa's Bottled Water market is showing a clear shift towards premium products and curated experiences.
- For example, Mountain Falls positions its Bottled Water as a high-quality mineral option.
- Similarly, Stellenbosch's historic Lanzerac Wine Estate has introduced the world's first Fine Water tasting room, in collaboration with The Fine Water Company. This premium experience includes a 45-minute guided tasting featuring six globally sourced Bottled Waters, three still and three sparkling, with bottles priced above R1,000.
- Furthermore, LITA Water has entered the premium space through limited edition Bottled Waters that support the Riky Rick Foundation's mental health initiatives, with the brand continuing to emphasise its use of premium natural filtration.



INNOVATION & TECHNOLOGY

GOZONE WATER OZONE PURIFICATION UPGRADE



- Biozone Manufacturing has installed an advanced ozone based purification system at its Gozone Water Senderwood branch to enhance the safety and quality of Gozone Water's purified water offering.
- The ozonation system reduces reliance on traditional chemical disinfectants, offering a greener water treatment solution while maintaining premium purified water standards.
- The Senderwood installation forms part of Biozone's wider collaboration with Gozone Water to deliver sustainable, cost effective water treatment solutions across South Africa as water scarcity grows.

DRIVERS

WATER CRISIS FUELS BOTTLED WATER DEMAND

- South Africa's worsening water crisis is fuelling demand for Bottled Water as concerns about the reliability and quality of municipal supply intensify.
- High-profile failures such as the prolonged Johannesburg water crisis, where communities experienced extended outages and visible infrastructure breakdowns, have reinforced perceptions that tap water is unreliable.
- Industry players are responding to this shift in demand. In April 2025, Manzi Water announced plans to open seven new franchise stores in South Africa, explicitly linking its expansion to rising demand for Bottled Water and escalating water quality concerns.
- Overall, deteriorating infrastructure, policy responses and ongoing urban supply failures are deepening dependence on Bottled Water. This is sustaining market growth and encouraging further investment in production capacity and distribution.



CHALLENGES

SUSTAINABILITY EXPECTATIONS CHALLENGE THE MARKET



- South Africa's Bottled Water market faces growing challenges as shifting consumer expectations around sustainability reshapes their preferences, placing growing pressure on Bottled Water manufacturers to provide products that meet these new expectations.
- According to the 2025 Two Sides Trend Tracker survey, there is a clear preference for packaging that is recyclable, biodegradable, and made from renewable materials.
- However, the local Bottled Water market is struggling to keep pace with these expectations. South Africa produces nearly 2.5 million tonnes of plastic each year, with PET accounting for about 45% of the beverage packaging market.
- As environmental concerns rise and more consumers seek eco-friendly options, the local Bottled Water sector may face increasing scrutiny for its reliance on PET and contribution to the plastic-waste burden.

TABLE OF CONTENTS

EXECUTIVE SUMMARY (5 Pages)

Global Industry Overview
South African Industry Overview
South African Industry Drivers and Challenges
South African STEEP Analysis
South African Porter's Five Forces Analysis

1. GLOBAL BOTTLED WATER INDUSTRY (12 Pages)

- 1.1 Global Industry Overview: **VALUE OF THE GLOBAL BOTTLED WATER MARKET: 2025* VS 2030* (IN US\$ BILLION) (Graph)**
- 1.2 Global Industry Market Environment
- 1.3 Global Key Markets: Regional Overview: **GLOBAL BOTTLED WATER REVENUE BY REGION: 2025* (IN US\$ BILLION) (Graph)**
- 1.4 Global Industry Trade: Imports of Water Without Sugar: **GLOBAL HS2201* IMPORT VALUE: 2020-2024** (IN US\$ BILLION); TOP 5 HS2201* IMPORTING COUNTRIES: 2024** (IN US\$ MILLION) (Graphs)**
- 1.5 Global Industry Trade: Exports of Water Without Sugar: **GLOBAL HS2201* EXPORT VALUE: 2020-2024** (IN US\$ BILLION); TOP 5 HS2201* EXPORTING COUNTRIES: 2024** (IN US\$ MILLION) (Graphs)**
- 1.6 Global Industry Trade: Imports of Water With Sugar: **GLOBAL HS220210* IMPORT VALUE: 2020-2024** (IN US\$ BILLION); TOP 5 HS220210* IMPORTING COUNTRIES: 2024** (IN US\$ BILLION) (Graphs)**
- 1.7 Global Industry Trade: Exports of Water With Sugar: **GLOBAL HS220210* EXPORT VALUE: 2020-2024** (IN US\$ BILLION); TOP 5 HS220210* EXPORTING COUNTRIES: 2024** (IN US\$ BILLION) (Graphs)**

TABLE OF CONTENTS

1. GLOBAL BOTTLED WATER INDUSTRY (CONTINUED) (12 Pages)

- 1.8 Global Industry Trends
- 1.9 Global Industry Innovation and Technology
- 1.10 Global Industry Drivers
- 1.11 Global Industry Challenges

2. SOUTH AFRICAN BOTTLED WATER INDUSTRY (25 Pages)

- 2.1 South African Industry Overview
- 2.2 South African Industry Overview: South African National Bottled Water Association
- 2.3 South African Industry Trade: Imports and Exports of Water Without Sugar: **SA WATER (HS2201**) IMPORTS: 2019-2024* (IN ZAR MILLION); SA WATER (HS2201**) EXPORTS: 2019-2024* (IN ZAR MILLION) (Graphs)**
- 2.4 South African Industry Trade: Imports and Exports of Water With Sugar: **SA WATER (HS220210**) IMPORTS: 2019-2024* (IN ZAR MILLION); SA WATER (HS220210**) EXPORTS: 2019-2024* (IN ZAR MILLION) (Graphs)**
- 2.5 South African Industry Market Size: South African Bottled Water Market Definitions
- 2.6 South African Industry Market Size: South African Bottled Water Distribution Channel Definitions
- 2.7 South African Industry Market Size: Bottled Water Market (2019-2024): **VALUE OF SA BOTTLED WATER MARKET: 2019-2024 (IN ZAR MILLION); SA BOTTLED WATER MARKET CAGR AND TOTAL GROWTH (IN PERCENTAGE) (Graph & Table)**
- 2.8 South African Industry Market Size: Bottled Water Market (2019-2024: By Category): **VALUE OF SA BOTTLED WATER MARKET BY CATEGORY: 2019-2024 (IN ZAR MILLION) (Graph)**
- 2.9 South African Industry Market Size: Still Bottled Water Market (2019-2024: By Sub-Category): **VALUE OF SA STILL BOTTLED WATER MARKET BY SUB-CATEGORY: 2019-2024 (IN ZAR MILLION) (Graph)**

TABLE OF CONTENTS

2. SOUTH AFRICAN BOTTLED WATER INDUSTRY (CONTINUED) (25 Pages)

- 2.10 South African Industry Market Size: Carbonated Bottled Water Market (2019-2024: By Sub-Category): **VALUE OF SA CARBONATED BOTTLED WATER MARKET BY SUB-CATEGORY: 2019-2024 (IN ZAR MILLION) (Graph)**
- 2.11 South African Industry Market Size: Flavoured Bottled Water Market (2019-2024: By Sub-Category): **VALUE OF SA FLAVOURED BOTTLED WATER MARKET BY SUB-CATEGORY: 2019-2024 (IN ZAR MILLION) (Graph)**
- 2.12 South African Industry Market Size Forecast: Bottled Water Market (2025*-2029*): **VALUE OF SA BOTTLED WATER MARKET: 2024 & 2029* (IN ZAR MILLION); SA BOTTLED WATER MARKET VALUE FORECAST BY CATEGORY (IN ZAR MILLION) (Graph & Table)**
- 2.13 South African Industry Market Volumes: Bottled Water Market (2019-2029*): **RETAIL VOLUME OF SA BOTTLED WATER MARKET BY SEGMENT (2018-2028*) (Table)**
- 2.14 South African Industry Market Volumes: Total Unit Volume by Pack Type (2019-2029*): **PACK TYPE VOLUME OF SA BOTTLED WATER MARKET BY SEGMENT: IN MILLION UNITS (2019-2029*) (Table)**
- 2.15 South African Industry Market Volumes: Total Unit Volume by Pack Size (2019-2029*): **PACK SIZE VOLUME OF SA BOTTLED WATER MARKET BY SEGMENT: IN MILLION UNITS (2019-2029*) (Table)**
- 2.16 South African Industry Market Distribution: Bottled Water Market: **CHANNEL DISTRIBUTION FOR BOTTLED WATER PRODUCTS: 2024 (IN PERCENTAGE); CHANNEL DISTRIBUTION (2019 AND 2024) BY OUTLET TYPE (Graph & Table)**
- 2.17 South African Industry Trends
- 2.18 South African Industry Innovation and Technology
- 2.19 South African Industry Drivers
- 2.20 South African Industry Challenges

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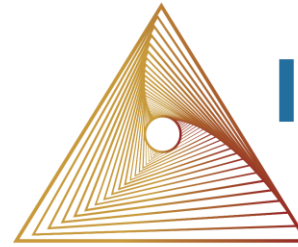
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