



SOUTH AFRICAN CARBONATED SOFT DRINKS (CSD) MARKET INSIGHTS REPORT

PUBLISHED: NOVEMBER 2024

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.

We believe in the advantage market research gives business leaders to fully understand their industry, facilitate business strategy, improve company performance, and drive company growth.

INDUSTRY & COMPETITOR INTELLIGENCE

Our bespoke Industry and Market 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 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 Market Insights Report (64 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.

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?

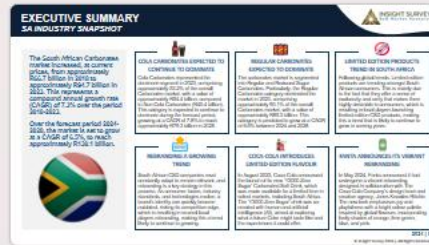
64-page report filled with detailed charts, graphs, and insights



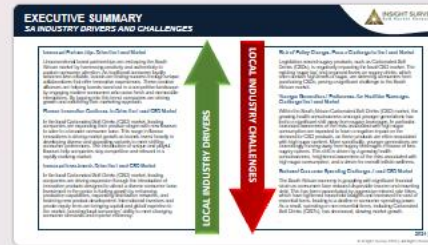
6



7



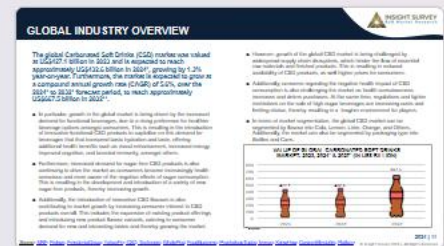
8



9



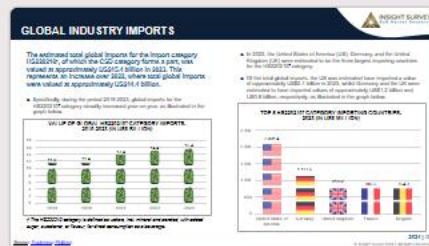
10



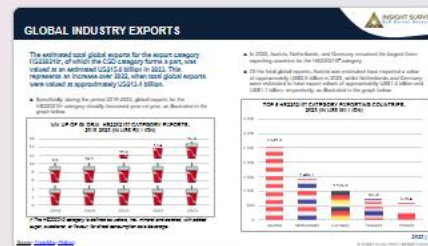
11



12



13



14



15



16



17



18



19



20

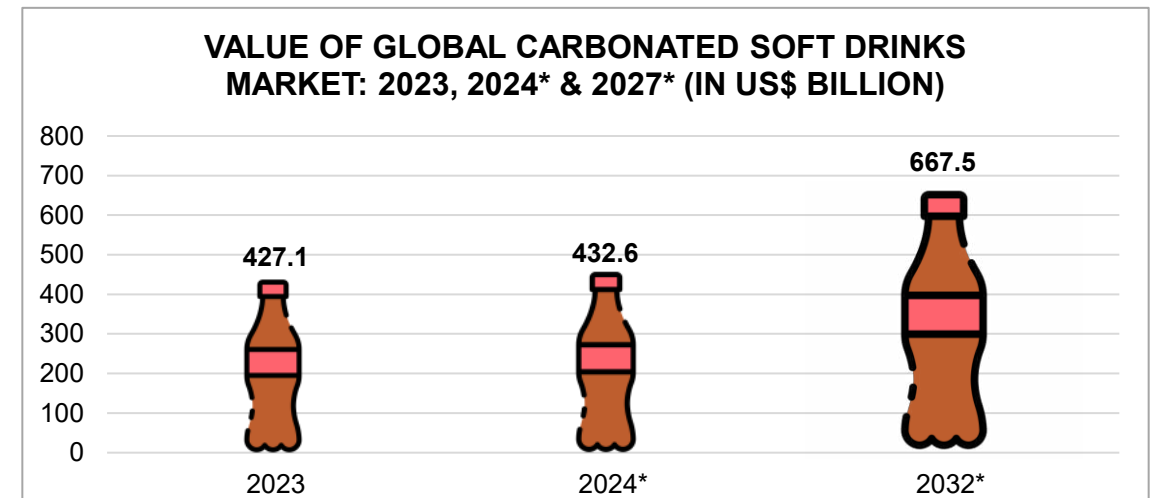
SAMPLE FROM REPORT

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.

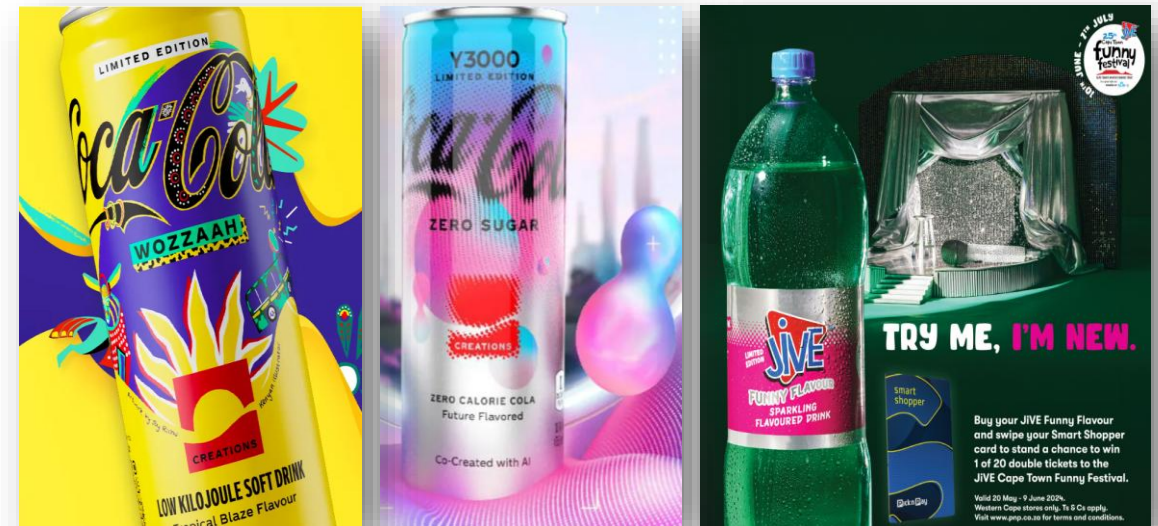


* Forecast

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.



TABLE OF CONTENTS

EXECUTIVE SUMMARY (4 Pages)

- Global Industry Snapshot
- South African Industry Snapshot
- South African Industry Drivers and Challenges

1. GLOBAL CARBONATED SOFT DRINKS INDUSTRY (21 Pages)

- 1.1 Global Industry Overview: **VALUE OF GLOBAL CARBONATED SOFT DRINKS MARKET: 2023*, 2024* & 2027** (IN US\$ BILLION) (Graph)**
- 1.2 Global Market Environment
- 1.3 Global Industry Imports: **VALUE OF GLOBAL HS220210† CATEGORY IMPORTS: 2019-2023* (IN US\$ BILLION); TOP 5 HS220210† CATEGORY IMPORTING COUNTRIES: 2023* (IN US\$ MILLION) (Graphs)**
- 1.4 Global Industry Exports: **VALUE OF GLOBAL HS220210† CATEGORY EXPORTS: 2019-2023* (IN US\$ BILLION); TOP 5 HS220210† CATEGORY EXPORTING COUNTRIES: 2023* (IN US\$ MILLION) (Graphs)**
- 1.5 Global Key Markets: Regional Overview: **GLOBAL CARBONATED SOFT DRINKS (CSD) REVENUE: BY REGION: 2024* (IN US\$ BILLION) (Graph)**
- 1.6 Global Industry Trends
- 1.7 Global Industry Innovation and Technology
- 1.8 Global Industry Drivers
- 1.9 Global Industry Challenges

TABLE OF CONTENTS

2. SOUTH AFRICAN CARBONATED SOFT DRINKS INDUSTRY (33 Pages)

- 2.1 South African Industry Overview
- 2.2 South African Imports and Exports: **VALUE OF SOUTH AFRICAN HS22021010* & HS22021090** IMPORTS: 2019-2023*** (IN ZAR MILLION); VALUE OF SOUTH AFRICAN HS22021010* & HS22021090** EXPORTS: 2019-2023*** (IN ZAR MILLION) (Graphs)**
- 2.3 South African Industry Market Size: South African Carbonates Market Definitions
- 2.4 South African Industry Market Size: South African Carbonates Distribution Channel Definitions
- 2.5 South African Industry Market Size: Carbonates Market (2018-2023): **VALUE OF SA CARBONATES MARKET: 2018-2023 (IN ZAR BILLION); SA CARBONATES MARKET CAGR AND TOTAL GROWTH (IN PERCENTAGE) (Graph and Table)**
- 2.6 South African Industry Market Size: Carbonates Market (2018-2023: By Category): **VALUE OF SA CARBONATES MARKET BY CATEGORY: 2018-2023 (IN ZAR BILLION) (Graph)**
- 2.7 South African Industry Market Size: Non-Cola Carbonates Market (2018-2023: By Sub-Category): **VALUE OF SA NON-COLA CARBONATES MARKET BY SUB-CATEGORY: 2018-2023 (IN ZAR BILLION) (Graph)**
- 2.8 South African Industry Market Size: Carbonates Market (2018-2023: By Category): **VALUE OF SA CARBONATES MARKET BY CATEGORY: 2018-2023 (IN ZAR BILLION) (Graph)**
- 2.9 South African Industry Market Size: Cola Carbonates Market (2018-2023: By Sub-Category): **VALUE OF SA COLA CARBONATES MARKET BY SUB-CATEGORY: 2018-2023 (IN ZAR BILLION) (Graph)**
- 2.10 South African Industry Market Size: Non-Cola Carbonates Market (2018-2023: By Sub-Category): **VALUE OF NON-COLA CARBONATES MARKET BY SUB-CATEGORY: 2018-2023 (IN ZAR BILLION) (Graph)**
- 2.11 South African Industry Market Volumes: Non-Cola Carbonates Market (2018-2023): **VALUE OF SA NON-COLA CARBONATES MARKET BY SUB-CATEGORY: 2018-2023 (IN ZAR MILLION) (Table)**
- 2.12 South African Industry Market Size Forecast: Carbonates Market (Forecast: 2024*-2028*): **VALUE OF SA CARBONATES MARKET: 2023 & 2028* (IN ZAR BILLION); SA CARBONATES MARKET VALUE FORECAST BY CATEGORY (IN ZAR MILLION) (Graph and Table)**

TABLE OF CONTENTS

2. SOUTH AFRICAN CARBONATED SOFT DRINKS INDUSTRY (CONTINUED) (33 Pages)

- 2.13 South African Industry Market Volumes: Carbonates Market (2018-2028*): **RETAIL VOLUME OF SA CARBONATES MARKET BY SEGMENT (2018-2028*) (TABLE)**
- 2.14 South African Industry Market Distribution: Carbonates Market Distribution Channels: **CHANNEL DISTRIBUTION FOR CARBONATES PRODUCTS: 2023 (IN PERCENTAGE); CHANNEL DISTRIBUTION (2018 AND 2023) BY OUTLET TYPE (Graph and Table)**
- 2.15 South African Industry Trends
- 2.16 South African Industry Innovation and Technology
- 2.17 South African Industry Drivers
- 2.18 South African Industry Challenges



ORDER FORM

ORDERING INSTRUCTIONS

(1.) **Complete the order form and** email back to info@insightsurvey.co.za (2.) An invoice will be generated and e-mailed (3.) The report will be emailed upon receipt of payment. (4.) All prices exclude 15% VAT.

COMPANY DETAILS

Company Name:			
Physical Address:			
Town/City:		Postal Code:	
Country:			
Purchaser Name: (name to appear on invoice)			
Purchaser Email Address:			
Telephone Number:		VAT Number:	

CONFIRMATION: I/we wish to order this publication (please tick the applicable box)

Title of Publication	Total Excl. VAT	Tick Box
South African Carbonated Soft Drinks Market Insights Report 2024	R27,500.00	

ACKNOWLEDGEMENT

I am authorised to order this publication on behalf of the company and agree to the payment terms.

Client (Print Name)

Signature

Capacity

Date

CONTACT DETAILS



CAPE TOWN

+27 (0)21 045 0202

Unit 154 B&C, Block E
19 Edison Way, Millennium Business Park
Century City
7441

info@insightsurvey.co.za

www.insightsurvey.co.za

JOHANNESBURG

+27 (0)10 140 5756

1 Wedgewood Link
Bryanston
Johannesburg
2191