

INSIGHT SURVEY
Business growth delivered

**SOUTH AFRICAN
SPORTS & ENERGY DRINKS
MARKET INSIGHTS BROCHURE**

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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.



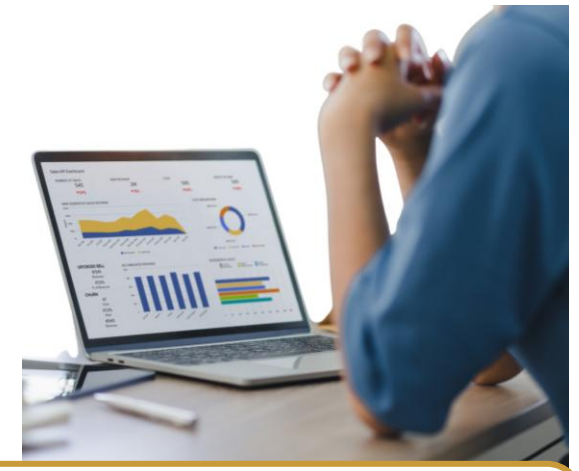
Bespoke B2B Market Research Solutions



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**.

INDUSTRY & COMPETITOR INTELLIGENCE

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 Sports and Energy Drinks Industry Market Insights Report (42 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.

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 Global Sports and Energy Drinks 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): 2019-2024 Actual, 2025-2029 Forecasts, and distribution channels?
- What are the latest South African Sports and Energy Drinks industry trends, innovation and technology, drivers, and challenges?
- What are Porter's Five Forces shaping the South African Sports and Energy Drinks market?
- What is the Steep analysis of the South African Sports and Energy Drinks market?

SCREENSHOTS FROM REPORT

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



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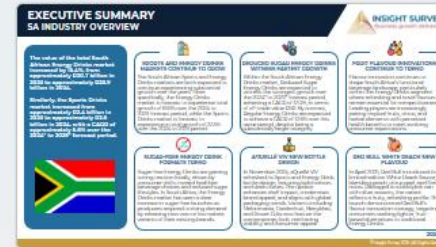
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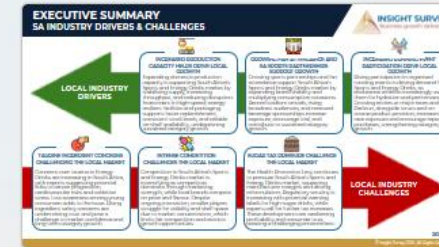
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SAMPLE FROM REPORT

SA INDUSTRY OVERVIEW: ENERGY DRINKS MARKET

The total South African Energy Drinks market increased by 15.4%, in terms of retail value RSP, from approximately R20.7 billion in 2023 to approximately R23.9 billion in 2024. Moreover, the market is predicted to grow at a compound annual growth rate (CAGR) of 13.2% for the 2024* to 2029* forecast period.

- Energy Drinks are defined as any still or carbonated beverage containing high levels of stimulant ingredients, typically caffeine, as well as sugar and additional supplements such as vitamins, taurine, or carnitine. These products are promoted for their ability to enhance mental alertness and physical performance.
- Segmented by category, the South African Energy Drinks market consists of Regular Energy Drinks and Reduced Sugar Energy Drinks. The Regular Energy Drinks category dominated the market in 2024, reaching approximately R14.6 billion, in total value RSP terms, representing 96.3% of the total market. The Reduced Sugar Energy Drinks category made up the remaining 3.7% of the Energy Drinks market, in total value RSP terms, reaching a value of approximately R1.5 billion in 2024.
- In terms of volume growth, the Energy Drinks market increased from approximately 375.4 million litres in 2023 to approximately 406.4 million litres in 2024. The market is also projected to expand further over the 2025* to 2029* forecast period, reaching approximately 564.1 million litres by 2029*.

- This current and forecast growth in the overall local Energy Drinks market continues to be driven by expanded local production capacity, enhancing supply reliability, operational efficiency, and product availability across retail channels.
- Additionally, strong sports partnerships and rising fan attendance are also boosting brand visibility and driving consumption both at events and during at-home viewing. Finally, increasing participation in organised running events is creating more occasions for hydration and energy replenishment, reinforcing regular usage and supporting sustained category growth.
- However, the South African Energy Drinks market faces several challenges, including ongoing sugar tax pressures, intensifying competition between large multinational brands with smaller local players competing over innovation and pricing, and increasing health concerns surrounding ingredients such as taurine. These factors may pose obstacles to sustained growth and profitability over the forecast period.



SAMPLE FROM REPORT

SA TRENDS, INNOVATION & TECHNOLOGY, DRIVERS AND CHALLENGES

TRENDS

FRUIT FLAVOUR INNOVATIONS CONTINUE TO TREND

- Flavour innovation continues to shape South Africa's functional beverage landscape, particularly within the Energy Drinks segment where refreshing and novel flavours remain essential for competitiveness.
- Leading players are increasingly pairing tropical fruits, citrus, and herbal elements with perceived health benefits to meet evolving consumer expectations.
- As an illustration, Red Bull, a leading player in South Africa's Energy Drinks market, recently introduced a white peach-flavoured variant. Similarly, Dragon expanded its fruity portfolio with guava lime and peachy nut flavours.
- In addition, Chill Beverages South Africa unveiled a limited-edition Score Energy Drink inspired by wine gums, offering a tangy and chewy, fruit-forward flavour profile.



INNOVATION & TECHNOLOGY

SCORE ENERGY DRINK NEAPOLITAN ICE CREAM FLAVOUR



- In April 2025, Chill Beverages South Africa released a limited-edition Score Energy Drink Neapolitan Ice Cream flavour.
- The flavour includes the taste of a crispy sugar cone, with the classic combination of chocolate, vanilla, and strawberry.
- Positioned as a novelty launch, it highlights Score's playful and adventurous brand identity.
- The flavour offers a fun, creamy, indulgent and sweet nostalgia taste that also caters to ice cream and dessert lovers.

DRIVERS

RUNNING EVENTS DRIVE LOCAL GROWTH

- The growing popularity of organised running events continues to fuel demand for Sports and Energy Drinks, as endurance athletes increasingly rely on these beverages for hydration and performance during training and races.
- Participation levels are climbing, with the Sanlam Cape Town Marathon reaching 24,000 marathon entries for 2025 and Parkrun setting new participation records in early 2025.
- At large-scale races, Sports Drink consumption is clearly visible. For example, Comrades 2025 planned for approximately 600,000 Thirsti Sports Drink sachets, while Two Oceans publicly confirmed Powerade as its official hydration partner, supplying its products to runners.
- This sustained increase in participation, coupled with structured product delivery at major events, enhances in-race exposure and encourages repeat purchases.



CHALLENGES

COMPETITION CHALLENGES THE LOCAL MARKET



- South Africa's Sports and Energy Drinks market has become highly competitive as local brands fight for consumer attention. Global leaders like Red Bull and Monster dominate through wide distribution and strong marketing, while local brands such as Switch, Score, Reboost and Dragon compete on affordability, flavour and accessibility, intensifying rivalry across the category.
- Although the Energy Drinks segment remains dynamic, with ongoing product launches and packaging innovation, this growth has intensified competition. Smaller brands face significant challenges in gaining visibility and securing shelf space.
- Recent studies on market concentration show that a few dominant firms control key sectors in South Africa, creating barriers that restrict smaller competitors' growth and distribution access. This imbalance weakens fair competition and leaves many local players struggling to survive.

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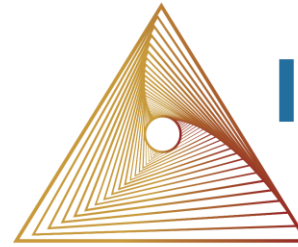
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