

INSIGHT SURVEY

Business growth delivered

**SOUTH AFRICAN
CARBONATED SOFT DRINKS
INDUSTRY INSIGHTS BROCHURE**

Published: JULY 2026

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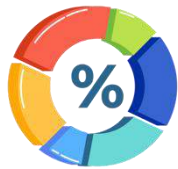
Smarter insights. Built around your customised needs and budget.



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Survey Insights

Gain strategic insights through:

- Interviews/surveys with B2B stakeholders and decision-makers
- Consumer surveys

Helping you understand:

- Market perceptions
- Purchase behaviour
- Brand loyalty and
- Factors that will drive your market share and business growth.



Quarterly Industry Intelligence Report

More than just market intelligence, the monitor becomes a **valuable knowledge-sharing tool** helping leadership teams with decision making through providing updated:

- Competitor News & Financial Results
- Product Launches
- Industry Trends
- Global & SA News & Legislation
- Innovation & Technology
- Socio-Political

The result is **clear, decision-support intelligence** that helps your business:

- Anticipate risks,
- Identify opportunities, and
- Stay ahead of market change.



The **South African Carbonated Soft Drinks Market Sizing and Competitor Analysis Insights Report (59 pages)** provides a dynamic synthesis of industry research, examining the local **Carbonated Soft Drinks Industry**, in-depth view of the market players and competitors, their latest company news in terms of products, services, marketing initiatives, the latest marketing and advertising news, products offered and social media following.



Key questions the report will help you to answer

SA Market Sizing & Competitor Analysis

- What are the current market dynamics (market size and market value): 2020-2025 Actual, 2026-2030 Forecasts?
- Which are the key manufacturers, distributors, and retail players in the South African Carbonated Soft Drinks industry?
- What is the latest company news for key players in terms of products, services, and new launches?
- For each key manufacturer, what are the products offered?
- How does each key player position themselves, and what are the strategic implications?

COMPANIES IN COMPETITOR ANALYSIS



WOOLWORTHS FOOD



SCREENSHOTS FROM REPORT

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



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SAMPLE FROM REPORT

COMPANY NEWS



Coca-Cola Announces its STONEY® Moves to Clear PET Packaging

In June 2026, Coca-Cola South Africa announced that STONEY® ginger beer classic would transition from its iconic brown bottle to clear PET packaging, beginning with the 2.25-litre bottle. The move aimed to make bottles easier to collect and recycle, while maintaining the brand's distinctive KWETSA® taste and familiar variant colours across its refreshed packaging nationwide. **(23 June 2026)**



Fanta Hosts its Comic Con Activation in Cape Town

In April 2026, Fanta, a Coca-Cola brand, promoted its Comic Con Cape Town activation, announcing that Fanta would be present from 30 April to 3 May. The campaign invited consumers to visit the Fanta stand for refreshments, Xbox gaming, and prizes, while reinforcing its playful '#WantaFanta' positioning through entertainment-led engagement with attendees and fans. **(30 April 2026)**



Coca-Cola Announces Investment in South Africa Through 2030

In April 2026, Coca-Cola and its authorised bottlers, Coca-Cola Beverages South Africa and Coca-Cola Peninsula Beverages, announced a R17.6-billion investment in South Africa through 2030. The investment was intended to expand production capacity and accelerate innovation across the Coca-Cola system's value chain. **(2 April 2026)**



Schweppes Launches New Flavour Variants Through '#IconReimagined' Campaign

Schweppes, a Coca-Cola brand, announced the launch of new flavour variants through its '#IconReimagined' campaign. More specifically, the brand highlighted Tangerine, Pineapple Coconut and Pomegranate as part of the new range, reinforcing Schweppes' positioning as an original and iconic sparkling beverage brand within the Carbonated Soft Drinks category. **(20 March 2026)**



Fanta Promotes its 'Join the Spinnas Wanta' Competition

In January 2026, Fanta, a Coca-Cola brand, promoted its 'Join the Spinnas Wanta' competition, encouraging consumers to spin with Fanta for a chance to win gaming vouchers and other prizes. The competition invited consumers to tap the link in the brand's bio to play, reinforcing Fanta's playful '#WantaFanta' positioning across its digital platforms. **(15 January 2026)**



Coca-Cola Introduces Mashesha 250ml Bottle Pack

In December 2025, Coca-Cola South Africa introduced Coca-Cola Mashesha, a new 250ml bottle pack available across Coca-Cola, Fanta, Sprite and Stoney at a recommended retail price of R6. The launch aimed to provide consumers with a convenient, affordable, on-the-go option through spaza shops and wholesale outlets nationwide. **(18 December 2025)**



Coca-Cola HBC Acquires Coca-Cola Beverages Africa

In October 2025, Coca-Cola HBC announced an agreement to acquire Coca-Cola Beverages Africa, which operated in 14 African markets and represented around 40% of Coca-Cola system volumes on the continent. The acquisition aimed to expand Coca-Cola HBC's African presence and support sustainable, profitable growth by 2026. **(21 October 2025)**



THE *Coca-Cola* COMPANY

SAMPLE FROM REPORT

FITCH & LEEDES MARKETING & ADVERTISING NEWS

Fitch & Leedes continues to reinforce its premium positioning through mixology-led marketing, strategic hospitality partnerships, experiential activations, and lifestyle-focused digital campaigns.

- For Father's Day 2026, Fitch & Leedes partnered with Six Dogs Gin, Jan Braai, and Last Word Hotels for an Instagram giveaway, encouraging consumers to follow the brands, tag family members, and engage with premium hospitality experiences and product prizes.
- The brand continued expanding its presence within South Africa's premium hospitality sector by securing listings at restaurants, cafés, and bars including Yours Truly Café & Café Paradiso, MARU, Burger & Lobster Cape Town, Hacienda SA, and Nikkei. In Mauritius, Fitch & Leedes also conducted a week-long activation featuring hotel staff training, trade engagement, and premium mixology education across leading resorts.
- Fitch & Leedes further strengthened its premium credentials through event partnerships. As the official mixer for Best Day Out, the brand operated a dedicated drinks trailer serving cocktails, mocktails, and product samples at the Cape Town Company's Garden event, providing consumers with direct product experiences.
- The brand also leveraged high-profile experiential marketing opportunities through its 'Best Artisans Behind the Bar' series, showcasing South Africa's leading bartenders and celebrating cocktail craftsmanship.

- Its partnership with the Investec South African Open further increased visibility among premium audiences by serving mixers throughout the championship and creating additional sampling opportunities within a premium sporting environment.
- Across Facebook, Fitch & Leedes tapped into Wimbledon through premium, occasion-led content. The brand used tennis-inspired messaging and serve-related wordplay to promote its mixers, including a 'Tie Break Tonic' cocktail featuring Fitch & Leedes Pink Tonic. The campaign reinforced the brand's association with crafted serves, premium mixology, and seasonal at-home cocktail occasions.



Fitch & Leedes' Social Media Following – w/c 18 June 2026



76,000



42,500



N/A



N/A

Established in 2007, Kingsley Beverages is a global beverage company built on the belief that great taste should be accessible at an affordable price. The company positions itself as an ‘affordable premium’ brand, offering high-quality beverages that deliver taste, quality, and value without compromise.

- Kingsley has an international footprint spanning Africa, the Middle East, Europe, the United Kingdom, and North America. Its products are distributed through a combination of retail, wholesale, and online channels, enabling broad market reach across multiple regions.
- The company develops, manufactures, markets, and distributes its own range of beverage brands across multiple categories, including Carbonated Soft Drinks, energy drinks, sports drinks, iced teas, juices, and bottled water. Its products are developed using high-quality ingredients and processes aligned with international beverage industry standards.
- Within the Carbonated Soft Drinks category, Kingsley differentiates itself through its value-driven positioning, offering consumers a premium drinking experience at a more accessible price point.
- In particular, the company's portfolio of Carbonated Soft Drink brands include Best Malt, Frugo, Kingsley Cola, Kingsley Fan Favourites, Kingsley Fruity, Kingsley Mixers, Mulberry Creek Mixers, and Surfside Mocktails. Additionally, the product ranges include flavours such as cola, cream soda, and fruit-based variants, along with zero-sugar and innovation-led options.

KINGSLEY BEVERAGES CARBONATED SOFT DRINKS BRANDS/PRODUCTS:	
○ Best Malt	○ Kingsley Fruity
○ Frugo	○ Kingsley Mixers
○ Kingsley Cola	○ Mulberry Creek Mixers
○ Kingsley Fan Favourites	○ Surfside Mocktails



SAMPLE FROM REPORT

MARKET SIZE OVERVIEW

SOUTH AFRICAN CARBONATES MARKET VALUE

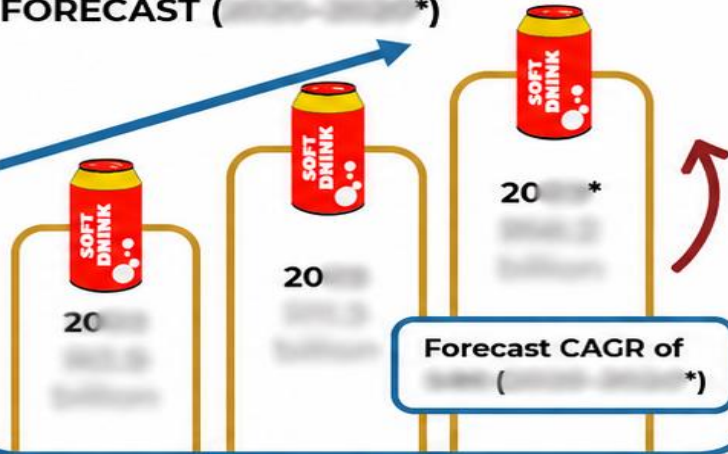
Increased from approximately [redacted] to approximately [redacted] in [redacted].

Market increase of [redacted] from [redacted] to [redacted].

Grew at a CAGR of [redacted] ([redacted] - [redacted]).



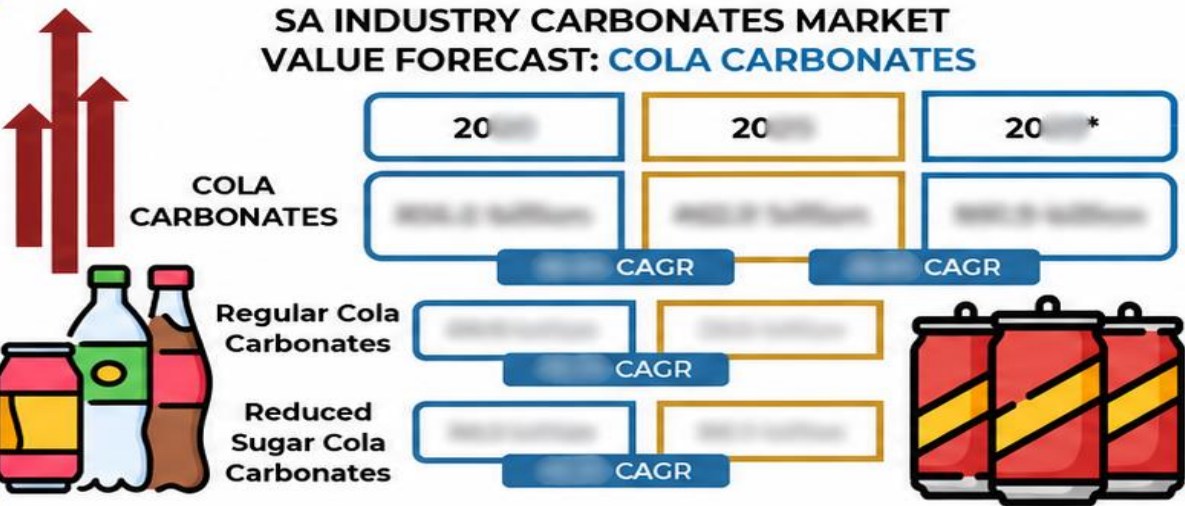
SA CARBONATES MARKET VALUE FORECAST ([redacted] - [redacted]*)



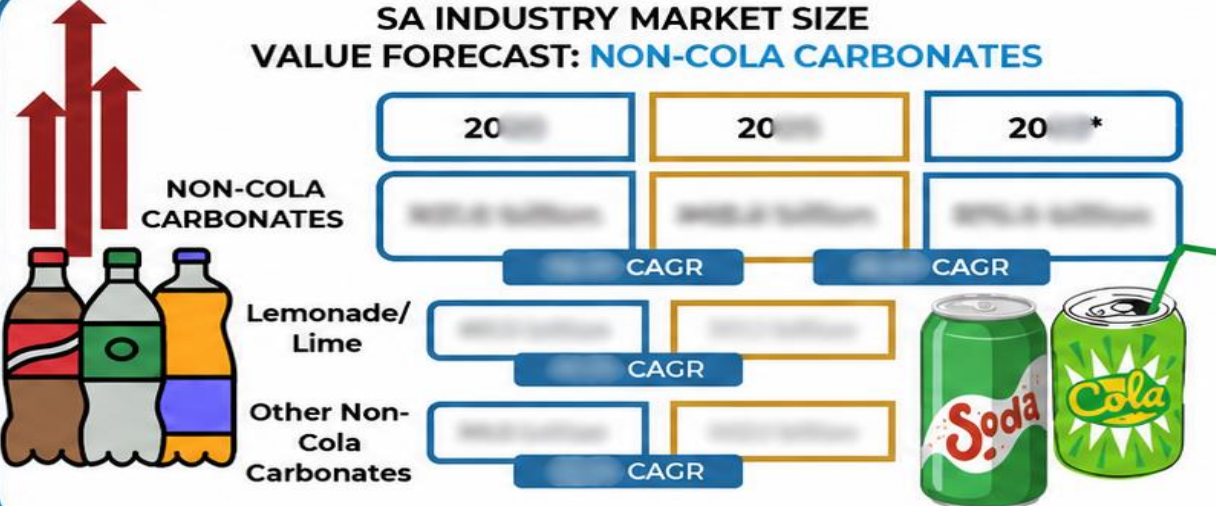
SA CARBONATES MARKET VOLUMES



SA INDUSTRY CARBONATES MARKET VALUE FORECAST: COLA CARBONATES



SA INDUSTRY MARKET SIZE VALUE FORECAST: NON-COLA CARBONATES



SAMPLE FROM REPORT

SOCIAL MEDIA FOLLOWING

BRAND	2024	2026	CHANGE			% CHANGE
Coca Cola Company						
Fanta						
Twizza						
Kingsley Beverages						
Fitch & Leeds						
Refreshhh						
Coo-ee						

MARKET SIZING & COMPETITOR ANALYSIS REPORT

EXECUTIVE SUMMARY (7 Pages)

South African Carbonated Soft Drinks Industry: Market Size
Brand Positioning Archetypes
Competitive Strategy Heatmap
Competitive Positioning Map
Category Leader Dashboard
Social Media Following

SOUTH AFRICAN CARBONATED SOFT DRINKS INDUSTRY (13 Pages)

South African Industry Overview
South African Industry Market Size: South African Carbonated Soft Drinks Market Definitions
South African Industry Market Size: South African Carbonated Soft Drinks Distribution Channel Definitions
South African Industry Market Size: Carbonates Market (2020-2025): VALUE OF SA CARBONATES MARKET: 2020-2025 (IN ZAR MILLION); SA CARBONATES MARKET CAGR AND TOTAL GROWTH (IN PERCENTAGE) (Graph and Table)
South African Industry Market Size: Carbonates Market (2020-2025: By Category): VALUE OF SA CARBONATES MARKET BY CATEGORY: 2020-2025 (IN ZAR MILLION) (Table)
South African Industry Market Size: Carbonates Market (Forecast: 2026*-2030*): VALUE OF SA CARBONATES MARKET: 2025 & 2030* (IN ZAR MILLION); CARBONATES MARKET VALUE FORECAST BY CATEGORY (IN ZAR MILLION) (Graph and Table)



MARKET SIZING & COMPETITOR ANALYSIS REPORT

SOUTH AFRICAN CARBONATED SOFT DRINKS INDUSTRY (CONTINUED) (13 Pages)

South African Industry Market Volumes: Carbonates Market (2020-2030*: By Category): VALUE OF SA CARBONATES MARKET BY CATEGORY: 2020-2030* (IN ZAR MILLION) (Table)

South African Industry Market Distribution: Carbonates Market: CHANNEL DISTRIBUTION FOR CARBONATE PRODUCTS: 2025 (IN PERCENTAGE); CHANNEL DISTRIBUTION (2020 AND 2025) BY OUTLET TYPE (Graph and Table)

SOUTH AFRICAN CARBONATED SOFT DRINKS MANUFACTURER AND DISTRIBUTOR OVERVIEW (25 Pages)

The Beverage Company (BevCo): Company News

The Beverage Company (BevCo): Carbonated Soft Drink Brands/Products

The Beverage Company (BevCo): Coo-EE Marketing News

The Beverage Company (BevCo): Jive Marketing News

The Beverage Company (BevCo): Refreshhh Marketing News

Chill Beverages: Company News and Carbonated Soft Drink Brands/Products

Chill Beverages: Marketing: Fitch & Leedes

Coca-Cola Company: Company News

Coca-Cola Company: Carbonated Soft Drink Brands/Products

Coca-Cola Company: Coca-Cola Marketing News

Coca-Cola Company: Marketing: Fanta Marketing News

Coca-Cola Company: Marketing: Schweppes Marketing News



MARKET SIZING & COMPETITOR ANALYSIS REPORT

SOUTH AFRICAN CARBONATED SOFT DRINKS MANUFACTURER AND DISTRIBUTOR OVERVIEW (CONTINUED) (25 Pages)

Fever-Tree: Company News

Fever-Tree: Marketing News

Kingsley Beverages: Overview

Kingsley Beverages: Carbonated Soft Drinks Brands/Products

Kingsley Beverages: Kingsley Marketing and Advertising News

Pura Beverage Company: Company News and Brands/Products

Pura Beverage Company: Marketing and Advertising News

Soda King: Overview and Carbonated Soft Drink Brands/Products

Tiger Brands: Overview and Carbonated Soft Drink Brands/Products

Twizza: Company News and Carbonated Soft Drink Brands/Products

Twizza: Twizza Marketing News

South African Carbonated Soft Drink Manufacturers & Distributors: Other

SOUTH AFRICAN CARBONATED SOFT DRINKS RETAILER ANALYSIS (4 Pages)

Checkers and Shoprite: Carbonated Soft Drink Brands/Products

Pick n Pay: Carbonated Soft Drink Brands/Products

SPAR: Carbonated Soft Drink Brands/Products

Woolworths Food: Carbonated Soft Drink Brands/Products



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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 AND BEVERAGE CLIENTS



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



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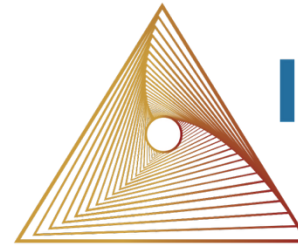
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