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

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ENERGY

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.



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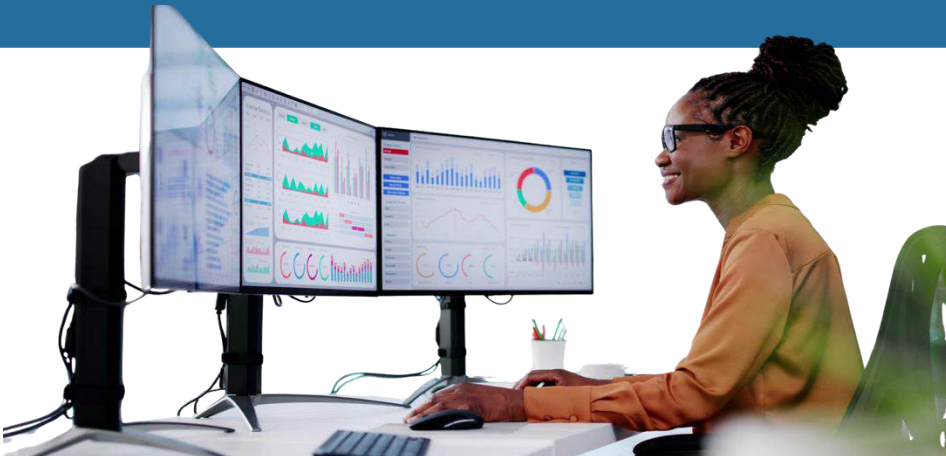
Our **market intelligence services** will ensure that you always stay ahead of **highly competitive South African markets**.

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 Landscape Report (87 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, manufacturer/distributor overview, flavour, and pricing analysis.

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?

For the South African Sports and Energy Drinks Manufacturer & Distributor Section:

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

For the South African Sports and Energy Drinks Flavour and Pricing Analysis Section:

- What are the current Sports and Energy Drinks flavour trends and prominent Sports and Energy Drink flavours in the local market?
- What are the prices of popular Sports and Energy Drinks brands across South African retail outlets?

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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.

THE ALTERNATIVE POWER (SWITCH) COMPANY NEWS



Switch Energy Drink Introduces New Orange Choc Flavour

In September 2025, Switch introduced Orange Choc as its newest limited-edition flavour for its Energy Drink, promoted with the line 'chocolate meets citrus and energy meets flavour.' The release followed other limited editions launched throughout the year, namely Vanilla Cola Float, Banoffee, and Prickly Pear, signalling ongoing flavour experimentation across the range. **(10 September 2025)**



Switch Energy Drink and Biogen Partner to Launch a New Sugar-Free Energy Drink

In September 2025, Switch Energy Drink and Biogen announced its partnership with the launch of Switch Energy x Biogen Zero Sugar G-Force Zero, a sugar-free variant of the Biogen Switch G-Force Energy Drink in Melon & Cherry flavour. In addition, the new product contains high caffeine and added B-vitamins to support energy production.

(5 September 2025)



Switch Energy Drink Partners with Omoda South Africa for a Competition Giveaway

In September 2025, Switch Energy Drink partnered with Omoda South Africa to launch the '#SwitchUpYourLife' competition, offering prizes worth R20 million. More specifically, consumers stood a chance to win airtime, data, retail vouchers, cash, smartphones, and one of 20 OMODA C7 vehicles, by entering with a unique code.

(1 September 2025)



Switch Energy Drink Partners with Galaxy 947 Joburg Day

In August 2025, Switch Energy Drink announced its role as the official beverage partner for the 'Galaxy 947 Joburg Day' event. To celebrate, the brand launched a giveaway of 20 general admission tickets. Customers could enter by liking the post, tagging a friend, reposting it to their Instagram story, and following both Switch and 947 Joburg.

(22 August 2025)



Switch Energy Drink Revives Limited-Edition Spotted Eggs Flavour for Easter

In April 2025, Switch reintroduced its limited edition Spotted Eggs flavour for its Energy Drink for Easter, supported by refreshed packaging. The announcement used a 'Then versus Now' comparison and the line 'same, but different', signalling the refresh and emphasising limited availability to prompt quick purchase.

(16 April 2025)



Switch Energy Drink Extends Partnership with Betway SA20

In July 2025, Switch Energy Drink and Betway SA20 renewed and extended its partnership with a multi-year agreement, building on the December 2024 appointment of Switch as the league's official Energy Drink partner. The renewal included plans for merchandise, game day giveaways and fan engagement activities to enhance the spectator experience. **(29 July 2025)**



Switch Energy Drink Introduces Glass-Bottled Packaging

In November 2024, Switch Energy Drink, in partnership with Halewood South Africa, announced the launch of glass-bottled versions of its Energy Drinks. More specifically, the updated packaging format included flavours such as the Original and Dry Lemon, both of which were made available to consumers ahead of the summer season.

(4 November 2024)



Switch Energy Drink Celebrates its 10 Years Anniversary

In November 2024, Switch Energy Drink celebrated its 10-year anniversary with a giveaway, offering customers the chance to win one of 10 cases of the new flavour by posting, tagging, and commenting on Switch's announcement. In addition, the brand launched a limited edition Bubbles flavour to mark the milestone.

(1 November 2024)



SA SPORTS & ENERGY DRINKS PRICING ANALYSIS

ENERGY DRINKS

BRAND AND SIZE			Checkers	makro	Pick n Pay	SPAR
Bioplus Energy Drink		440ml	N/A	R17.95	R21.99	R17.99
Dragon Energy Drink		500ml	N/A	N/A	R12.99	R13.99
House Brand Energy Drink		500ml	R11.99	N/A	N/A	R7.99
Lucozade Energy Sparkling Glucose Drink		360ml	R19.99	R17.45	R17.99	R22.99
		500ml	R26.99	R24.25	R28.99	R28.99
		1 litre	R47.99	R37.99	R47.99	R49.99
		6 x 360ml	R109.99	R106.95	R107.99	N/A
		6 x 500ml	N/A	R138.25	R137.49	N/A
MoFaya Energy Drink		500ml	N/A	R9.75	N/A	R12.99

This pricing analysis was conducted at retail stores and supermarkets during w/c 15 September 2025.

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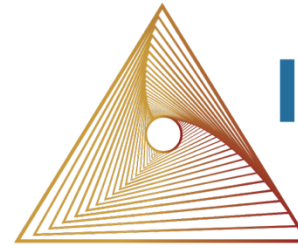
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