

INSIGHT SURVEY
Business growth delivered

SOUTH AFRICAN
CARBONATED SOFT DRINKS
INDUSTRY INSIGHTS SAMPLE REPORT

Published: JULY 2026

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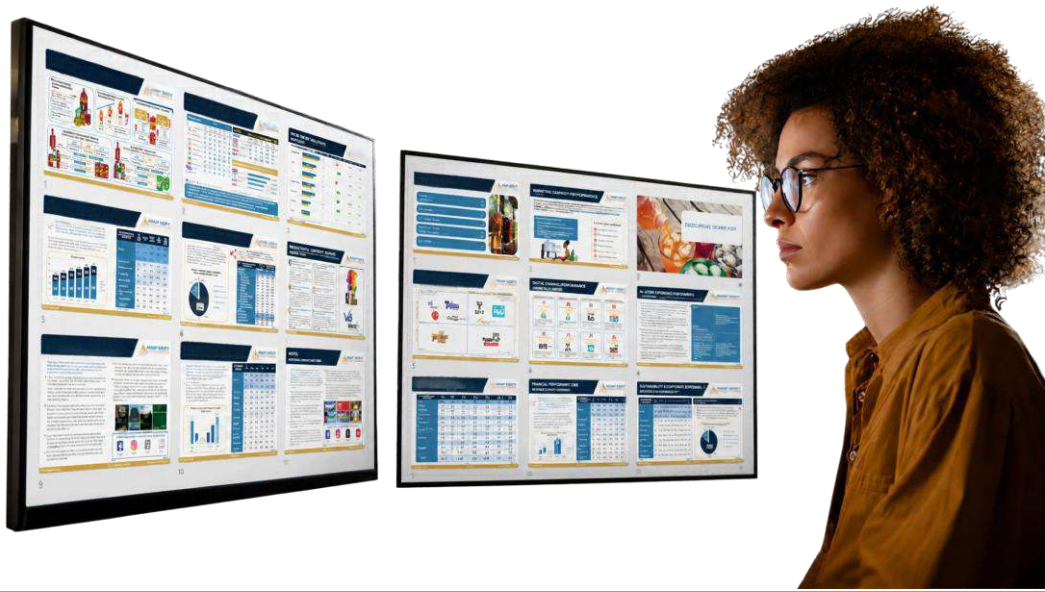
SA MARKET SIZING & COMPETITOR ANALYSIS
READY-TO-BUY

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The **South African Market Sizing and Competitor Analysis Insights Report** provides a dynamic synthesis of industry research, examining the local 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

- 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 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?



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COMPANIES IN COMPETITOR ANALYSIS

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VARUN BEVERAGES
BEVCO
THE BEVERAGE COMPANY

CHILLBEVERAGES

THE Coca-Cola COMPANY

SHOPRITE & Checkers

WOOLWORTHS FOOD

FEVER-TREE

TIGER BRANDS

Live a Little PURA

Twizza
Taste the moment

KINGSLEY

SPAR

Pick n Pay

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SCREENSHOTS FROM REPORT

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



21 ★



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SAMPLE FROM REPORT
COMPANY NEWS

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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

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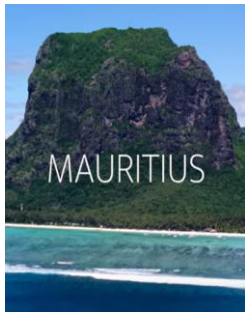
SAMPLE FROM REPORT
FITCH & LEEDES MARKETING & ADVERTISING NEWS

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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

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SAMPLE FROM REPORT
OVERVIEW

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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	○ Kinglsey Mixers
○ Kingsley Cola	○ Mulberry Creek Mixers
○ Kingsley Fan Favourites	○ Surfside Mocktails



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SAMPLE FROM REPORT
MARKET SIZE OVERVIEW

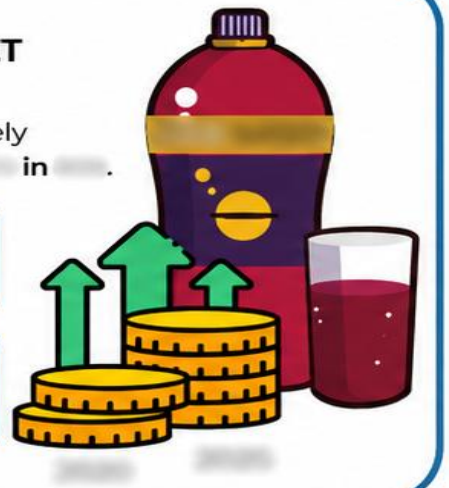
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SOUTH AFRICAN CARBONATES MARKET VALUE

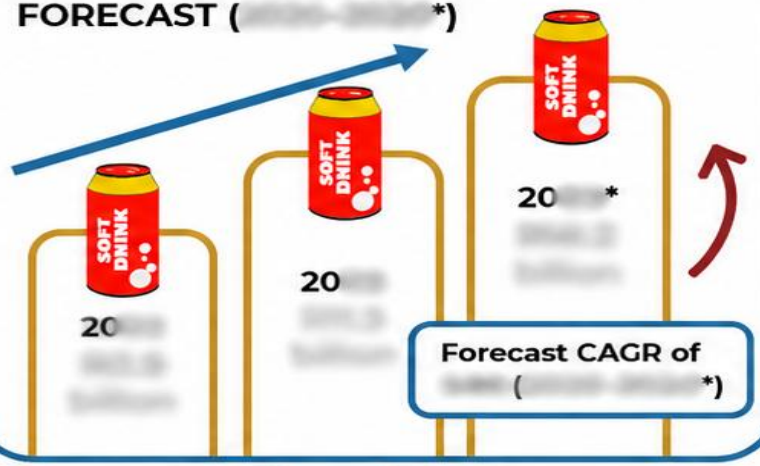
Increased from approximately [redacted] to approximately [redacted] in [redacted].

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

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



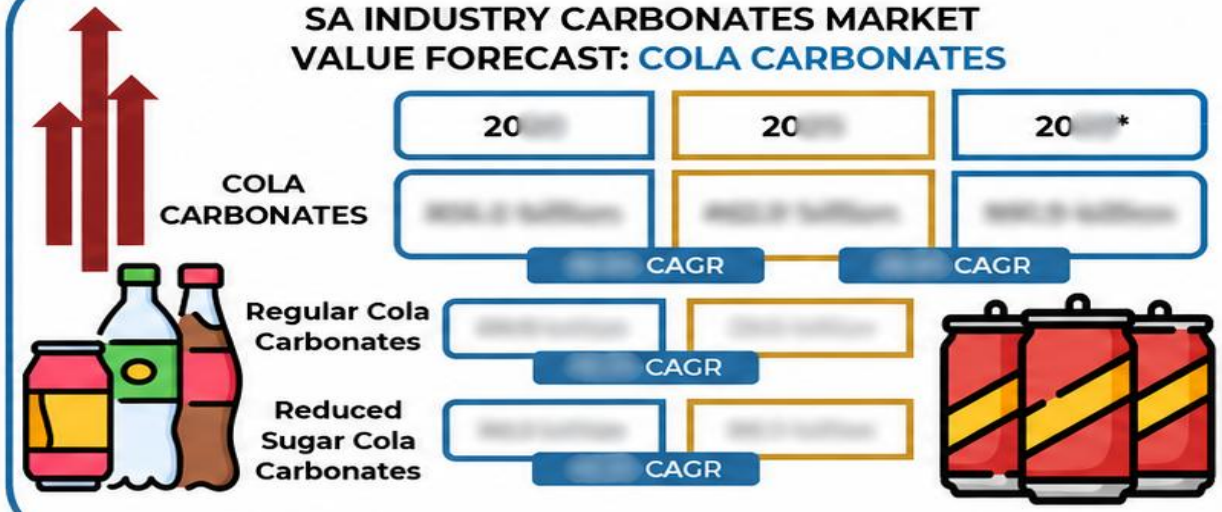
SA CARBONATES MARKET VALUE FORECAST ([redacted]*)



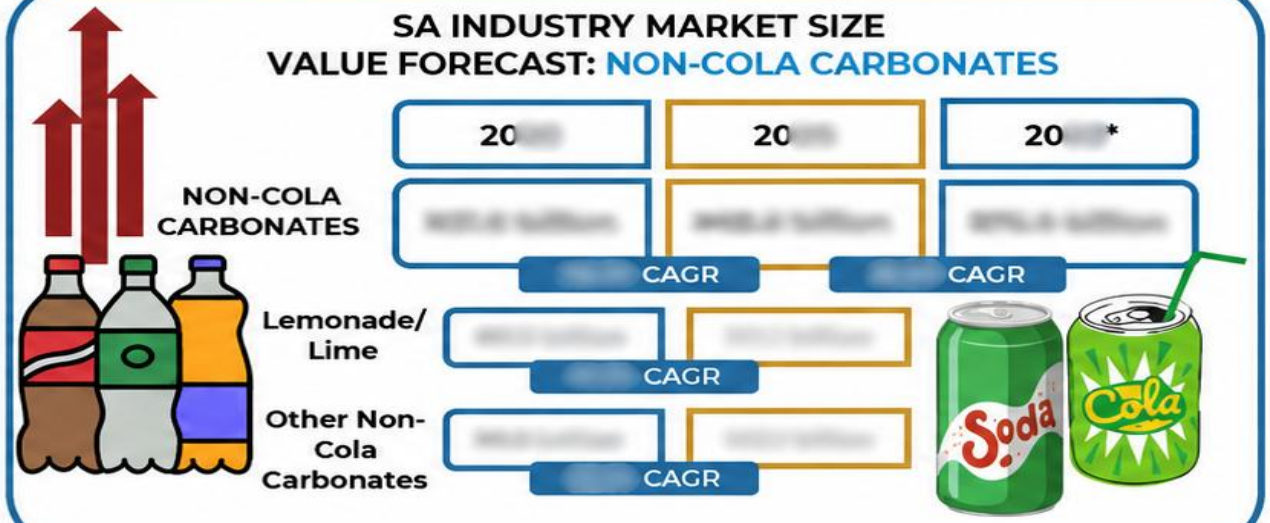
SA CARBONATES MARKET VOLUMES



SA INDUSTRY CARBONATES MARKET VALUE FORECAST: COLA CARBONATES



SA INDUSTRY MARKET SIZE VALUE FORECAST: NON-COLA CARBONATES



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SOCIAL MEDIA FOLLOWING

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

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MARKET SIZING & COMPETITOR ANALYSIS REPORT

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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)



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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 Beverege Company (BevCo): Refreshhh Marketing News

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

Chill Beverages: Marketing: Fitch & Leedes

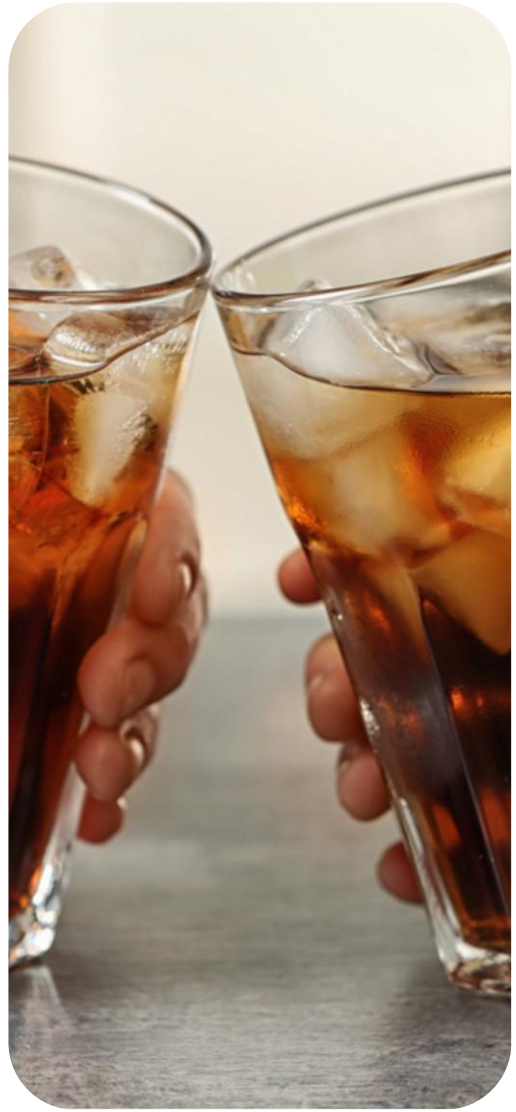
Coca-Cola Company: Company News

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



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MARKET SIZING & COMPETITOR ANALYSIS REPORT

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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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SA COMPETITOR MARKET SHARE ANALYSIS
ON-DEMAND

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The **Competitor Market Share Analysis Insights Report** provides valuable market intelligence on company and brand performance, featuring market share, retail sales and volume data for the period 2021–2025. By tracking performance over time, the report enables decision-makers to benchmark competitors, identify market share shifts, assess sales growth and understand the competitive positioning of individual companies and brands to inform strategic business decisions.

Key questions the report answer

- What is each company's market share, and how has it changed from 2021 to 2025?
- What is the market share of individual brands, and how has their position evolved?
- What are the annual retail sales of each company from 2021 to 2025?
- What are the annual retail volume of individual brands over this period?
- How does your company's and brand's performance compare with key competitors?

Sample: Market Share



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SOUTH AFRICAN INDUSTRY INSIGHTS REPORT
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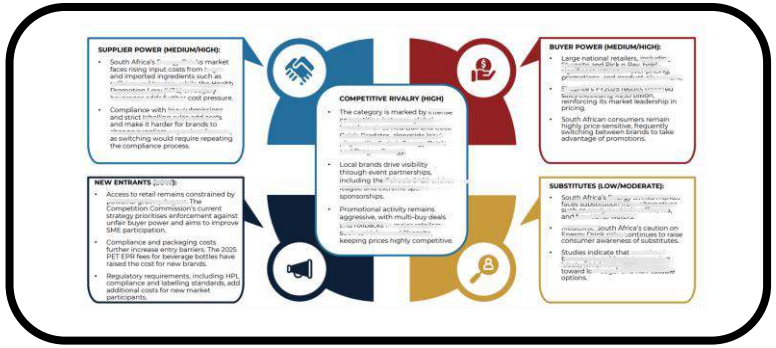
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The **South African Industry Insights Report** provides a comprehensive overview of the local market, examining the competitive landscape and key industry developments. It explores emerging trends, product innovation, technological advancements and the economic, social and regulatory factors shaping the market, highlighting key opportunities and challenges influencing future industry growth.

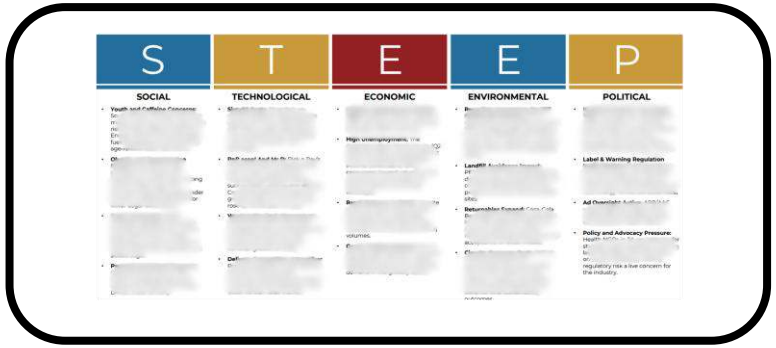
Key questions the report will help you to answer

- What is the Porter's Five Forces and STEEP analysis for the South African markets?
- What are the latest industry trends and product innovations?
- What are the key drivers shaping market growth?
- Which challenges could affect future industry growth
- What innovations and technology are shaping the South African industry?

Sample: Porter's Five Forces



Sample: Steep Analysis



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GLOBAL INDUSTRY INSIGHTS REPORT
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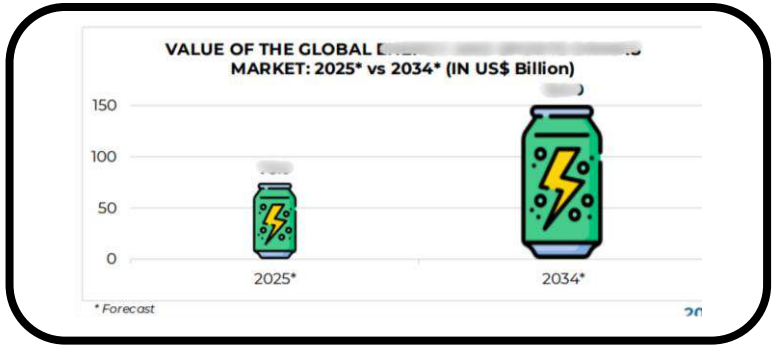
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The **Global Industry Insights Report** provides a comprehensive overview of global market dynamics, market size and growth forecasts, and key regional markets. It explores the competitive landscape, emerging consumer trends, product innovation and technological developments, alongside the key drivers and challenges shaping industry growth worldwide.

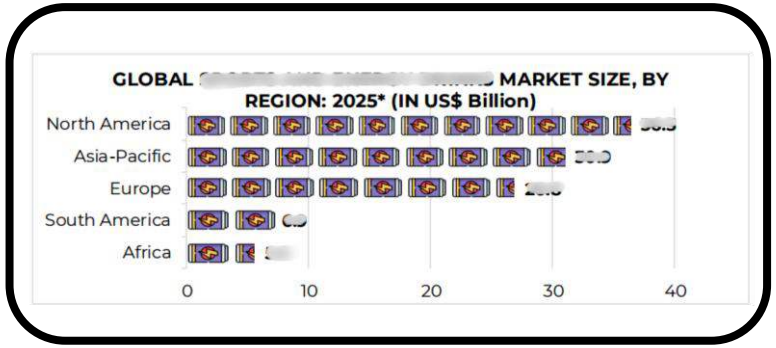
Key questions the report will help you to answer

- What are the current market dynamics of the industry?
- Which are the key markets within the industry?
- Which regions represent the largest markets, and what are the key developments shaping regional market growth?
- Which drivers and challenges could affect future industry growth?
- What innovations and technology are shaping the global industry?

Sample: Global Industry Overview



Sample: Key Markets - Regional



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PRICING ANALYSIS INSIGHTS REPORT
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The **Pricing Analysis Insights Report** provides a comparative overview of product prices across leading South African retail outlets. It examines pricing differences across retailers, brands and product sizes, offering valuable insights into market pricing, price positioning and the competitive retail landscape.

Key questions the report answer

- What are the prices of popular brands across South African retail outlets?
- How do product prices compare?

Sample: Pricing Analysis

BRAND AND SIZE			Checkers	makro	Pick n Pay	SPAR
[redacted]		[redacted]	R79.99	R73.95	R81.49	N/A
		24 x 500ml	N/A	R285.95	R310.49	N/A
[redacted]		500ml	R19.99	N/A	R19.99	N/A
		6 x 500ml	R119.99	N/A	R116.49	N/A
[redacted]		500ml	R19.99	N/A	R19.99	N/A
		6 x 500ml	R119.99	N/A	R116.49	N/A
[redacted]		500ml	R15.99	R14.95	R15.99	R15.49
		6 x 500ml	R89.99	R77.95	R94.99	R91.99
[redacted]		500ml	R15.99	N/A	R15.99	R15.49

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FLAVOUR ANALYSIS INSIGHTS REPORT
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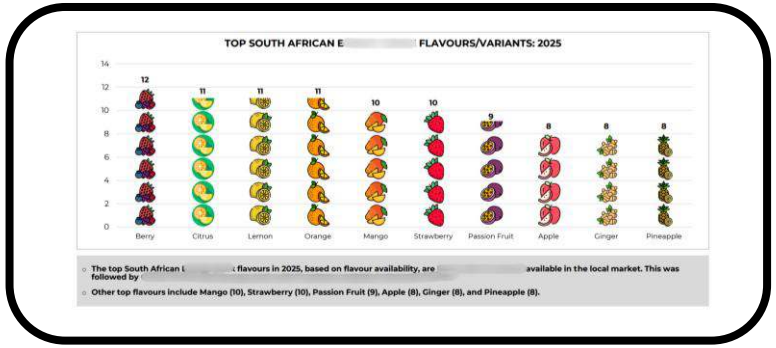
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The **Flavour Analysis Insights Report** provides an overview of flavour availability and product variety across the South African market. It compares the flavour offerings of leading brands, identifies the most prominent flavours and examines global and local flavour trends, highlighting emerging preferences, product innovation and opportunities for differentiation.

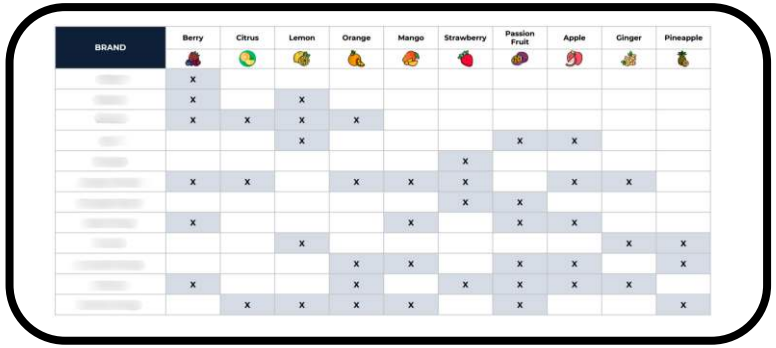
Key questions the report will help you to answer

- What are the current flavour trends and prominent flavours in the global and local market?
- Which flavours are most widely available in the South African market, and which have the greatest variety of product variants?
- Which flavours are unique to specific brands, and where are there similarities or gaps in flavour offerings?

Sample: Flavour Analysis



Sample: Flavour Matrix



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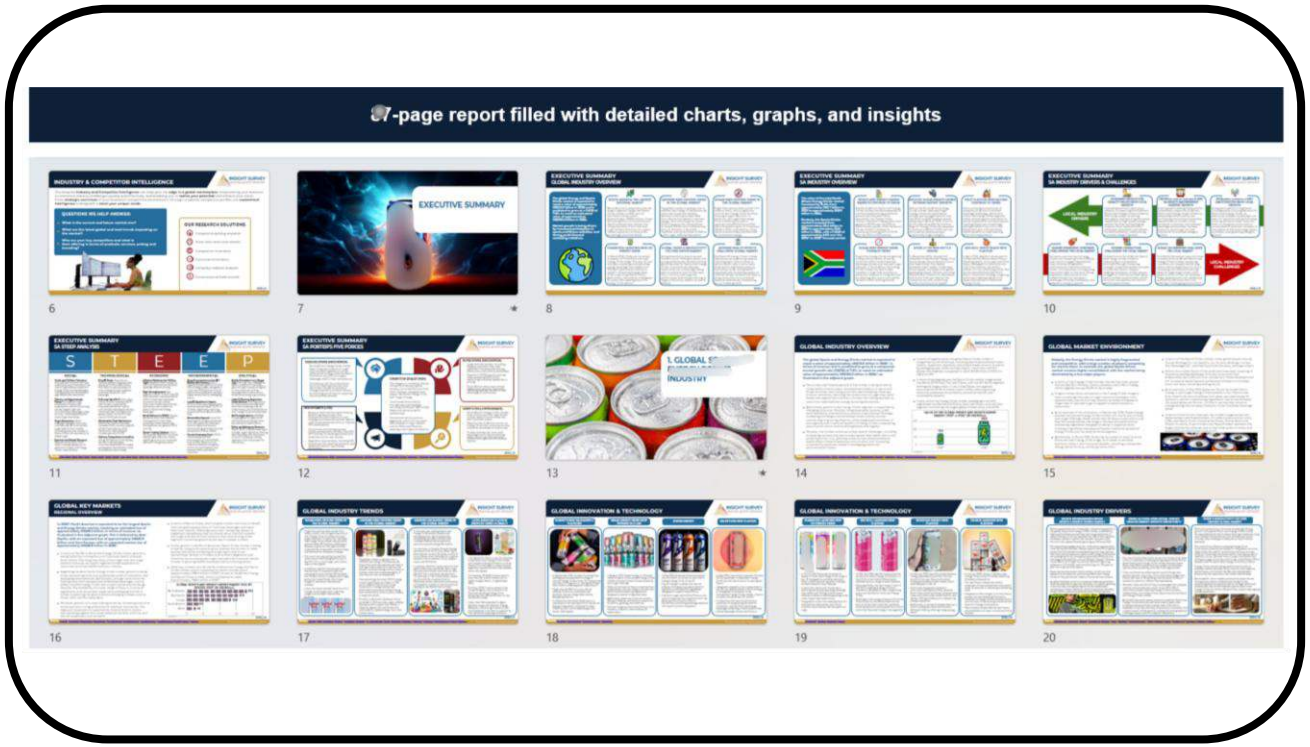
FULL LANDSCAPE INSIGHTS REPORT
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The **South African Full Industry Landscape Insights Report** provides a dynamic synthesis of industry research, examining the local and global industry from a uniquely holistic perspective, with detailed insights into the entire value chain: market size, industry trends, innovation and technology, industry drivers and challenges, manufacturer/distributor overview, flavour, and pricing analysis.

- Executive Summary
- Global Industry Snapshot
- South African Industry Snapshot
- South African Industry Drivers & Challenges
- South African Steep Analysis
- South African Porter's Five Forces
- Global Industry
- South African Industry
- SA Industry: Market Size
- South African Industry Manufacturer & Distributor Overview
- South African Industry Flavour Analysis
- South African Pricing Analysis

Sample: Screenshot of Selected Report Slides



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COMPANY OVERVIEW

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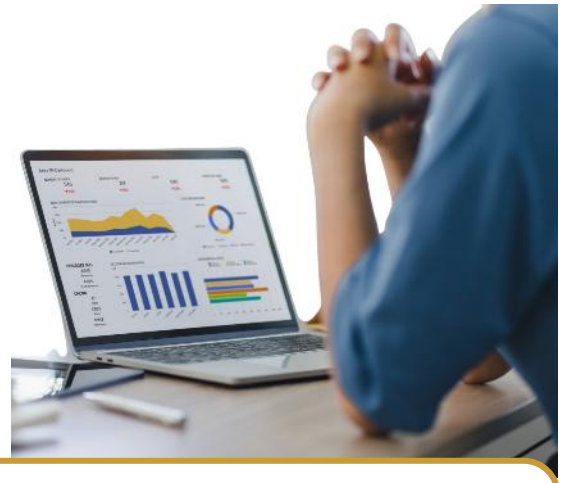
We are a South African, boutique market research agency with 20 years of experience, specialising in **Business-to-Business (B2B) and Industry Research**. We provide bespoke solutions to deliver business growth by ensuring you make **smarter, data-driven decisions with reduced investment risk**.

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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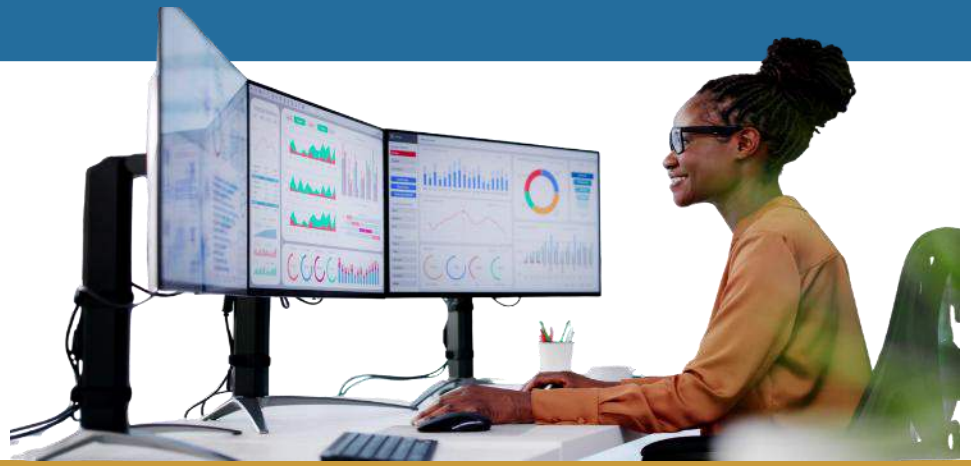
INDUSTRY & COMPETITOR INTELLIGENCE

INSIGHT SURVEY
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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

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OUR FOOD AND BEVERAGE CLIENTS

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AVI

BURGER KING

THE Coca-Cola COMPANY

famous | brands
you're in good company

HUNGRY LION

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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Nando's

Nestlé

PIONEER FOODS
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Premier



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