

Concentrates in South Africa

November 2023

Table of Contents

Concentrates in South Africa - Category analysis

KEY DATA FINDINGS

2023 DEVELOPMENTS

Unit price growth of concentrates significantly faster than overall soft drinks
Despite price increases and sugar concerns, concentrates still offers affordability
Postponement of higher sugar tax, while consumers defer to more nutritional soft drinks

PROSPECTS AND OPPORTUNITIES

Vegetable juice concentrates emerge to gradually compete with fruit flavours
Warning label regulation could spark surge in reduced sugar concentrates
Tiger Brands chooses to target community stores

CATEGORY DATA

Concentrates Conversions

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 2 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 3 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 5 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 6 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 7 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 8 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 9 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 10 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 11 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 12 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 15 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Soft Drinks in South Africa - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 16 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 18 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 20 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 22 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 24 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 26 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 27 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 28 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 29 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 30 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 31 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 32 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 33 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 34 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 35 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 36 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 37 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 38 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 39 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in South Africa

DISCLAIMER

SOURCES

Summary 2 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/concentrates-in-south-africa/report.