



RTD Tea in South Africa

November 2025

Table of Contents

RTD Tea in South Africa - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea sees modest rises as health trends favour rooibos and kombucha

INDUSTRY PERFORMANCE

RTD tea struggles with low volume growth in 2025

Kombucha continues to attract attentions

WHAT'S NEXT?

Functional offerings set to drive growth in forecast period

Digital developments will shape category progress

Health and wellness trends will continue to accelerate

COMPETITIVE LANDSCAPE

Lipton brand leads through appealing flavours

Kombucha trend supports growth for specialist company

CHANNELS

RTD tea sees most success in supermarkets

Third-party platforms and players' own sites expand, supporting rise in e-commerce distribution

CATEGORY DATA

Table 1 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 2 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 3 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 5 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 6 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 7 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 8 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 9 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 10 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 11 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 12 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 13 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in South Africa - Industry Overview

EXECUTIVE SUMMARY

Soft drinks sees moderate volume growth as affordability and investment shape performance

KEY DATA FINDINGS

Soft drinks sees moderate volume growth as affordability and investment shape performance

INDUSTRY PERFORMANCE

Advancements in production supports growth, while consumers focus on affordability

Premiumisation and sustainability remain key trends in soft drinks

E-commerce boosts engagement, and brands respond to anticipated sugar tax

WHAT'S NEXT?

Rising sales, sugar tax and new labelling requirements
Health and wellness trends will have continued impact on development
Distribution to become increasingly digital

COMPETITIVE LANDSCAPE

Coca-Cola holds on to number one spot
International players dominate while local brands gain ground

CHANNELS

Supermarkets leads as e-commerce rises fastest
Off-trade accounts for highest proportion of volume sales

MARKET DATA

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 15 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 17 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 21 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 23 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 24 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 25 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 27 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 28 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 29 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 30 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 31 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 32 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 33 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 34 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 35 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 36 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 37 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 39 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 45 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 47 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 49 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in South Africa

SOURCES

Summary 1 - 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/rtd-tea-in-south-africa/report.