



Euromonitor
International

Concentrates in South Africa

November 2025

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Concentrates in South Africa - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates sees rising demand driven by affordability, with liquid formats outperforming

INDUSTRY PERFORMANCE

Liquid concentrates leads growth through convenience and versatility

Powder concentrates suffers from low innovation

WHAT'S NEXT?

Low-cost nature of concentrates should see sales rise during forecast period

Mobile commerce and social media trends to have growing impact

Potential legislative developments may hinder progress

COMPETITIVE LANDSCAPE

Bromor maintains overall leadership of concentrates in 2025

Private label sees further expansion

CHANNELS

Supermarkets channel benefits from promotions and accessibility

E-commerce caters to convenience demand through delivery and subscription

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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
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