

Alcoholic Drinks in South Africa

June 2023

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 1 - Number of On-trade Establishments by Type 2017-2022

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

Table 3 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 4 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 5 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 6 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 10 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 11 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 13 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 15 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Beer in South Africa

KEY DATA FINDINGS

2022 DEVELOPMENTS

Flavoured/mixed lager sees exceptional growth, appealing to a wide range of consumers

Windhoek Lite temporarily discontinued

Castle Lite revamps its secondary packaging, ensuring product differentiation

PROSPECTS AND OPPORTUNITIES

Beer prices projected to increase based on challenging market conditions

SAB's ZAR5.8 billion investment to improve beer supply in the future

Extended load shedding periods expected to impact beer volumes in the forecast period

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2022

Table 18 - Number of Breweries 2017-2022

CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022

Table 20 - Sales of Beer by Category: Total Value 2017-2022

Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 27 - Sales of Beer by Craft vs Standard 2017-2022

Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in South Africa

KEY DATA FINDINGS

2022 DEVELOPMENTS

Savanna continues its momentum, driving overall growth in cider/perry

Demand for premium cider rises along with changes in consumer preference

Heineken to divest Strongbow as a condition of its acquisition of Distell

PROSPECTS AND OPPORTUNITIES

Local craft cider likely to develop following global cider awards

Growth expected for non alcoholic cider, based on health and wellness trend

Younger adults to drive growth over the forecast period

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2017-2022

Table 36 - Sales of Cider/Perry: Total Value 2017-2022
 Table 37 - Sales of Cider/Perry: % Total Volume Growth 2017-2022
 Table 38 - Sales of Cider/Perry: % Total Value Growth 2017-2022
 Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
 Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
 Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 43 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 44 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 45 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
 Table 46 - Forecast Sales of Cider/Perry: Total Volume 2022-2027
 Table 47 - Forecast Sales of Cider/Perry: Total Value 2022-2027
 Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
 Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

[Rtds in South Africa](#)

KEY DATA FINDINGS

2022 DEVELOPMENTS

New launches of spirit-based RTDs as demand increases
 Sober-curiosity strengthens demand for low/no alcohol products
 Demand for wine-based RTDs grows, based on convenience and affordability

PROSPECTS AND OPPORTUNITIES

Wellness trend set to gain momentum, driving stable growth for non alcoholic RTDs
 Demand for malt-based RTDs set to decline, due to limited innovation
 Consumer brand perception as a driver of volume growth

CATEGORY DATA

Table 50 - Sales of RTDs by Category: Total Volume 2017-2022
 Table 51 - Sales of RTDs by Category: Total Value 2017-2022
 Table 52 - Sales of RTDs by Category: % Total Volume Growth 2017-2022
 Table 53 - Sales of RTDs by Category: % Total Value Growth 2017-2022
 Table 54 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
 Table 55 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
 Table 56 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 57 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 58 - GBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 59 - NBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 60 - LBN Brand Shares of RTDs: % Total Volume 2019-2022
 Table 61 - Forecast Sales of RTDs by Category: Total Volume 2022-2027
 Table 62 - Forecast Sales of RTDs by Category: Total Value 2022-2027
 Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
 Table 64 - Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

[Spirits in South Africa](#)

KEY DATA FINDINGS

2022 DEVELOPMENTS

Gin helps white spirits maintain its lead in volume terms, and Amarula enters the race
 Demand for premiumisation increases, brandy gains momentum ahead of cognac
 Whiskies reassess their packaging and ABV level

PROSPECTS AND OPPORTUNITIES

Uptick in natural and craft products expected

Sugar supply stabilises, with rum set to see slow yet steady growth

Sustainability and communication efforts to boost brand recognition

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 4 - Benchmark Brands 2022

CATEGORY DATA

Table 65 - Sales of Spirits by Category: Total Volume 2017-2022

Table 66 - Sales of Spirits by Category: Total Value 2017-2022

Table 67 - Sales of Spirits by Category: % Total Volume Growth 2017-2022

Table 68 - Sales of Spirits by Category: % Total Value Growth 2017-2022

Table 69 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022

Table 70 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022

Table 71 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 72 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022

Table 73 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022

Table 74 - Sales of White Rum by Price Platform: % Total Volume 2017-2022

Table 75 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022

Table 76 - Sales of English Gin by Price Platform: % Total Volume 2017-2022

Table 77 - Sales of Vodka by Price Platform: % Total Volume 2017-2022

Table 78 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022

Table 79 - GBO Company Shares of Spirits: % Total Volume 2018-2022

Table 80 - NBO Company Shares of Spirits: % Total Volume 2018-2022

Table 81 - LBN Brand Shares of Spirits: % Total Volume 2019-2022

Table 82 - Forecast Sales of Spirits by Category: Total Volume 2022-2027

Table 83 - Forecast Sales of Spirits by Category: Total Value 2022-2027

Table 84 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 85 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in South Africa

KEY DATA FINDINGS

2022 DEVELOPMENTS

Wine maintains value growth, driven by price increases and strong volume growth

Demand for canned wine struggles, excluding sparkling wine

KWV product packaging innovation via bag-in-box

PROSPECTS AND OPPORTUNITIES

Wine expected to see a focus on premiumisation during the forecast period

Strong slowdown in growth for non alcoholic wine, impacted by small customer base and competition

Central body for wine to lobby interests of both producers and trade

CATEGORY DATA

Table 86 - Sales of Wine by Category: Total Volume 2017-2022

Table 87 - Sales of Wine by Category: Total Value 2017-2022

Table 88 - Sales of Wine by Category: % Total Volume Growth 2017-2022

Table 89 - Sales of Wine by Category: % Total Value Growth 2017-2022

Table 90 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022

Table 91 - Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 92 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 93 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022

Table 94 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022

Table 95 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022

Table 96 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022

Table 97 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022

Table 98 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 99 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 100 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022

Table 101 - GBO Company Shares of Champagne: % Total Volume 2018-2022

Table 102 - NBO Company Shares of Champagne: % Total Volume 2018-2022

Table 103 - LBN Brand Shares of Champagne: % Total Volume 2019-2022

Table 104 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 105 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 106 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022

Table 107 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 108 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 109 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022

Table 110 - Forecast Sales of Wine by Category: Total Volume 2022-2027

Table 111 - Forecast Sales of Wine by Category: Total Value 2022-2027

Table 112 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027

Table 113 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

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/alcoholic-drinks-in-south-africa/report.