



Carbonates in South Africa

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates sees rising volumes as pricing, distribution and reduced sugar variants underpin performance

INDUSTRY PERFORMANCE

Production and pricing strategies ensure continued growth for carbonates in South Africa
Non-cola carbonates sees fastest rise

WHAT'S NEXT?

Pricing to remain key to success
AI to have greater role in category development
Health trends will continue to shape progress

COMPETITIVE LANDSCAPE

Coca-Cola continues to dominate
PepsiCo benefits from acquisition

CHANNELS

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E-commerce as fastest-rising channel

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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

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