**COMPANY OVERVIEW**

**Insight Survey** is a South African B2B market research company with more than 10 years experience, focusing on business-to-business (B2B) market research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal or external environment.

At Insight Survey, we believe in the advantage marketing research gives business leaders to fully understand their industry, facilitate business development strategy, highlight company performance, and nurture **industry growth**.
Our bespoke Competitive Business Intelligence Research can help give the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision.

From strategic overviews of your business's competitive environment through to specific competitor profiles, our customised Competitive Intelligence Research is designed to meet your unique needs.

WHY?

SOLUTIONS

- Competitor pricing research
- Store visits and store checks
- Competitor interviews
- Customer interviews
- Company website analysis
- Governmental held records
Our Food and Beverages Industry Landscape reports have been purchased by global and South African companies:
The South African Carbonated Soft Drinks Industry Landscape Report (140 pages) provides a dynamic synthesis of industry research, examining the local and global Carbonated Soft Drinks Industry from a uniquely holistic perspective, with detailed insights into the entire value chain – from manufacturing to retailing, market size trends, industry trends, industry drivers & challenges, competitor and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Carbonated Soft Drinks Industry Section:
- What are the current market dynamics (market environment, production, key regional markets) of the Global Carbonated Soft Drinks industry?
- What are the Global Carbonated Soft Drinks industry trends, drivers, and challenges?

For the South African Carbonated Soft Drinks Industry Section:
- What are the current market dynamics (market size, market value, market volumes: 2012-2018 Actual, 2019-2023 Forecasts) of the SA Carbonated Soft Drinks industry?
- Who are the key manufacturing players in the SA Carbonated Soft Drinks industry?
- What are the South African industry trends, drivers, and challenges?

For the South African Retail and Pricing Analysis Section:
- Who are the key retail players (retail outlets and convenience stores) in the Carbonated Soft Drinks industry?
- What are the prices of frequently purchased Carbonated Soft Drinks brands across SA retail outlets?
140 page report filled with detailed charts, graphs, tables and insights
The largest regional CSD market globally is the European region, led by countries such as Germany, France, and the U.K. As the largest regional market, Europe was valued at US$132.9 billion in 2017, as illustrated in the adjacent graph.

- The consumption of Carbonated beverages, of which CSD forms a part, has remained static in many regions as a result of increasing health concerns amongst consumers regarding the use of sugar and artificial sweeteners in these beverages.
- In addition, increased governmental pressure and scrutiny on the market has resulted in greater regulation and tax of the Carbonated beverages market worldwide.
- Health concerns amongst consumers, particularly as a result of the obesity and diabetes epidemics, have negatively affected growth in the North American CSD market.
- The Asia-Pacific market is expected to experience the largest growth for the foreseeable future as a result of increases in disposable income and the consequent spending power.
- Although remaining the smallest regional market, it is possible that The Middle East and Africa may be the most important area for growth as volumes decrease in more mature markets in Europe and North America.
- Furthermore, younger populations entering the consumer class for the first time presents an opportunity for growth in this region.

South Africa and Saudi Arabia are the leading markets for The Middle East and Africa due to modern retail infrastructure, as well as bottling operations. Traditional channels remain the primary mode of distribution, while demand for healthier options are set to increase in the region.
Clean Labels

- One of the key trends that is expected to influence the beverage industry, and specifically Carbonated Soft Drinks, in the future is the fact that consumers are demanding total transparency from brands and clean labels are becoming standard for many products.
- The term Clean label refers to a consumer driven movement, which is demanding a return to real food. In other words, food products that consists of only natural, familiar and simple ingredients, and do not contain any artificial ingredients or synthetic chemicals.
- The movement towards clean labels means that many beverage companies will have to reconsider their production chains, as well as the way they communicate with consumers and create awareness for the key issues within their industry.
- There are some CSD products available in the South African industry that are marketed as natural with less ingredients. PURA Soda, for example, has a CSD product range which they claim has only five ingredients and a small amount of pure cane sugar. They also suggest that the natural flavours of their products come from natural sources and that no colourants are added to their products.
- Consumers are becoming more aware of environmental issues and expecting companies to act responsibly. Many are insisting that manufacturers ought to source their ingredients locally and responsibly, and that products should contain less ingredients.

Exotic Flavours

- The use of exotic flavours in CSD products is one the current trends that will continue to be relevant in the future. Soft drinks will be enriched with exotic flavours like passion fruit and other unexpected ingredients, such as seaweed or chillies.
- Furthermore, the packaging designs of these products will more than likely feature lush tropic greens and the bright colours of tropical flora and fauna.
- There are some industry players in South Africa that have introduced CSD products with exotic flavours. PURA Soda, for example, offers both lemon and elderflower and cucumber and lime flavoured sodas. Another example is Woolworths that sells a sparkling ruby grapefruit flavoured drink and a pear and elderflower sparkling drink under its private label.
In 2018, 65.5% of all Carbonated products were distributed through Modern Grocery Retailers, while 16.0% were distributed through Foodservices (On-trade), as illustrated in the graph below. Furthermore, 14.5% of Carbonates were distributed through Traditional Grocery Retailers, 2.3% through Mixed Retailers, 1.3% through Non-Grocery Specialists, and 0.4% through Non-Store Retailing.

The table below illustrates the distribution of Carbonates according to outlet type for 2012 and 2018. In 2018, 40.8% of Carbonates was distributed via Supermarkets (a slight decrease from 41.3% in 2012), while 12.8% was distributed via Convenience Stores (a slight increase from 12.7% in 2012).

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<td>Convenience Stores</td>
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Source: Euromonitor

Image Source: PAVBCA; The Noun Project; OnlineWebFonts; KissPNG
Established in 2007, Kingsley Beverages produces, markets, and distributes a variety of beverage brands and products throughout South Africa.

- The focus of the business is to provide consumers with an affordable option of upscale soft drink brands, as well as alternative beverages.
- Kingsley Beverages’ mission is to continually provide their customers with premium quality and great tasting beverages that are made using natural ingredients, where possible.
- The group has regional headquarters in Dubai, Johannesburg, and London. In South Africa, the group has four manufacturing sites which are located in Johannesburg, Mogale City, Springs, and Roodepoort.
- In addition, their products are distributed through a wide network comprising of Africa, the Middle East, and Europe.
- In 2016, Kingsley Beverages announced that the company would be investing £36 million in a bottling facility in the United Kingdom. Production at the facility was set to commence in 2017.
- Their brands portfolio is divided into Kingsley soft drinks, sports & energy drinks, Kingsley mixers, fruit drinks, ice tea, and water. A variety of carbonated beverages are available within the Kingsley fruit drinks, soft drinks, and mixers categories.
- Additionally, in 2016, Kingsley Beverages also became the official sponsor for the football tournament, La Liga.

KINGSLEY BEVERAGES CARBONATED SOFT DRINKS BRANDS/PRODUCTS:

- Frugo Apple Juice Sparkling
- Kingsley
- Kingsley Cream Soda
- Kingsley Dry Lemon
- Kingsley Ginger Ale
- Kingsley Ginger Beer
- Kingsley Iron Brew
- Kingsley Cola (Cola Caffeine Free, Cola Zero)
- Kingsley Kool (Original, Zero)
- Kingsley Lemonade
- Kingsley Tonic Water

Source: Kingsley1; Kingsley2; FDB; TM; Kingsley-UK; Sport; Kingsley3; Kingsley4; Frugo

Image Source: BSDA; Kingsley1; Kingsley2
Bashew's:

- Established in 1899, Bashew's is a Cape Town original Carbonated Soft Drink, which is available in several flavours.
- Bashew's flavours include pineapple, cream soda, iron brew, raspberry, cocopine, orange, ginger beer, and Harry's cola. The beverages are available in either a 330ml can or glass bottle.

Country Club:

- Country Club is a range of sparkling beverages created to be a fashionable alcohol-free alternative for social occasions including daily refreshment, sundowners, and cocktail hours.
- The range is available in three distinctive flavours namely, rock shandy, lime & soda, and passion fruit & lemonade. These beverages are available in 200ml cans.

Fitch & Leedes:

- Fitch & Leedes is a range of sparkling beverages that can be enjoyed on its own or incorporated as a mixer in cocktails and other alcoholic beverages.
- Their flavours include bitter lemon, Indian tonic, lemonade, ginger ale, craft cola, pink tonic and a recently released blue tonic. The Indian tonic and pink tonic are also available as a lite variant that is sugar free. These are all available in either a 200ml can or glass bottle.
This pricing analysis was conducted at retail stores and supermarkets during w/c 1 October 2018.

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<th>Brand and Size</th>
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<th>Game</th>
<th>Makro</th>
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## ORDER FORM

### ORDERING INSTRUCTIONS

1. Complete the order form and email back to info@insightsurvey.co.za
2. An invoice will be generated and e-mailed
3. The report will be emailed upon receipt of payment or when proof of payment has been provided
4. All prices exclude 15% VAT.

### COMPANY DETAILS

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