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2017 Annual Quantification Report NARTD Beverages

Bottled Water in South Africa

Published by Khathu Musingadi

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Research Objectives

Research Objectives

The objectives for the category were to:

1. Quantify the South African bottled water market, by volume and value
2. Break down the volume by:
    - Channel
    - Region
    - Product
    - Packaging
3. Identify producers who were actively supplying to the market
4. Highlight current trends in volume and value for the category
5. Forecast likely volumes for 2017 and 2021

Research Methodology

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Research Methodology

BMi Research applied the following standard methodology to produce the annual quantification report series:

- Major manufacturers, importers, governmental bodies and industries are contacted by using established contact lists
- Data collected from participants is checked with historical and corresponding information from packaging suppliers
- Data is captured into a central database and analysed to ascertain the total market trends
- Desk research is utilised to supplement and substantiate market data
- Reports are published and distributed to subscribers
- Market feedback is sent to all participants on publication to encourage continued participation

Industry Background

Industry Background

The bottled water market is fairly well represented by both smaller regional players as well as larger established suppliers, whilst imported products are seen more predominantly in on-consumption outlets.

This industry is regulated by the South African National Bottled Water Association (SANBWA) which is a voluntary association that sets standards and regulations in terms of the quality of water that is sold to consumers.

Bottled water is available in different varieties, including still, sparkling, flavoured and functional water, where still water maintains the primary share of the market volumes.

Plastic is the dominant packaging type in the bottled water trade, while there is limited use of glass, sachets and bulk water containers.

Following the tremendous growth seen historically for the bottled water category, year-on-year increases have slowed down somewhat. Bottled water is now firmly established within the market and, congruent with this phase of the product lifecycle, category growth has tapered off somewhat.

Definitions

Product & Channel Definitions

Product Definition	
Sparkling Flavoured Bottled Water	Water that contains carbon dioxide or hydrogen sulphide gas, whether naturally occurring or introduced on purpose to create an effervescent drink and also contains natural or artificial flavours.
Sparkling Non-Flavoured	Plain water into which carbon dioxide gas has been dissolved.
Still Flavoured	Purified water, uncarbonated, which contains flavourants.
Still Non-Flavoured	Reverse osmosis and ozonation are used as a purification process on water obtained from public or private distribution systems, to which just the right amount of minerals is added to deliver a premium, pure and clean taste.
Functional/Vitamin Water	An enhanced mineral water that contains in its formulation ingredients such as herbs, vitamins, minerals, amino acids, flavours etc. and often claims to provide health benefits.

Channel	Explanation
Export	Exports to Africa/SADC Exports to the rest of the world
Bottom-End Retail	Bottom-end outlets such as convenience, general dealers and liquor stores. Examples include Shield, Save and independently owned cafe’s
Garage Forecourts	Includes retail outlets linked to garages, such as Quick shops and Woolworths forecourts. Garage examples include Engen, Total, Shell, Caltex, BP and Sasol garage forecourts
On-Consumption	Includes restaurants, hospitality and pubs. These could be at work or recreational. Examples are quick service restaurants, full service restaurants, accommodation establishments and sports clubs
Off-Consumption	Sale of beverage for consumption elsewhere, not at point of purchase Usually associated with alcoholic beverages
Top-End Retail	Consists of hypermarkets and supermarkets. Examples include Pick n Pay, Spar, Checkers and Woolworths
Wholesale	Wholesale Chains (e.g. Makro, Metro and Browns) Wholesale Independents (Regional wholesalers with one outlet) Foodservice wholesalers (Specialist catering supply e.g. Chipkins)

Other Definitions

Economic Definitions	
GDP (Gross Domestic Product)	The total value of all final goods and services produced within the boundaries of a country
PCE (Private Consumption Expenditure)	Consumption spending by households, which is the largest component of total spending in the economy
CPI (Consumer Price Index)	Measures changes in the price level of market basket of consumer goods and services purchased by households

Acronym Definitions	
e	Current year estimated data
f	Forecast data
Ret	Returnable bottles
NR	Non-returnable bottles
p.a.	Per annum
RSP	Retail Selling Price
ISP	Industry selling price (Refers to an average multi-channel price)

Major Players

Major Players

Major Players	Brands	
Aqua Tiqua	Aqua Tiqua	
Aquazania	Aquazania	
aQuellé	aQuellé	
Aubaqua	Aubaqua	
Benè Water Company	Benè	
Blu Natural Spring Water	Blu Natural Spring Water	
Blue Frost	Blue Frost	
Branded Water	Hydrate	Private Labels
BrandsInk	Ice Age	Seltzer
Cape Aqua	Cape Aqua	
Cape Kingdom	Buchulife	
Cedarberg Aqua	Cedarberg Aqua	
Chamonix	Chamonix	
Chantilly Waters	H20 to Go	
Clover	Aquartz	Nestlé Pure Life
Crickley Dairy	Twizza ❖	
Darling Romery	Darling	
Durr Bottling	Aquabelle	

Please note: ❖ Denotes new entrant

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Major Players Cont.

Major Players	Brands	
Element South Africa	Elements	
Eastern Highlands	Eastern Highlands	
Elandsfontein Beverages	Elfonte	
EnerBev	Cape Karoo Mineral Water	
Exquisite Water	Exquisite Water ✂	
Food Lovers	Food Lovers	
Fruitime	Aquatime	
Happy Water	Happy Water	
Henties	Henties	
Herbex Health	Slim Herb Aqua Bliss	Slim Herb Aqua Immune
	Slim Herb Aqua Lift	Slim Herb Aqua Slim
Holkrans Bottling Manufacturing (Pty) Ltd	Holkrans Natural Mineral Water	
Ironbok	Ironbok ❖	
Just Water	Just Water	
Kingsley Beverages	Aquafrica	
La Vie de Luc	La Vie de Luc	
Little Green Beverage Company	Refreshhh ❖	

Please note: ❖ *Denotes new entrant*

Note: ✂ *Player exited*

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Major Players Cont.

Major Players	Brands	
Loerie Spring Water	Loerie Spring Water	
Lowveld Favourites	Lowveld Favourites	
Masafi Water	Masafi Water	
Monte Verde Water	Monte Verde	
Moordrift Dairy	Aquadrift	
Mountain Falls	Mountain Falls	
Natural Beverage Company	Aqua Naturelle	Niche Naturelle
Nature Zone	Nature Zone Fitness Water	Infuzion
Nestfield Investments	Cantina	San Marino
Normandien Farms	Thirsti	
Oasis Water	R03 Oasis	
Oryx Aqua	Oryx Aqua	
Paane Water	Paane	
Pholas Beverages	Pholas Mineral Water ✥	
Picardie Water	Picardie	
Pureau Fresh Water Company	Pureau	
Reitzer Pharmaceuticals	ReitzeR's ✥	
SM Jaeel	Oasis	

Please note: ✥ *Denotes new entrant*

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Major Players Cont.

Major Players	Brands	
Snack-a-Juice	Aqua Cristallo	Berg
Soda King	Soda King	
Sole Water	Sole Water	
Stafford Bros & Draeger	Evian Water	
Synergy Aqua	Synergy Aqua	
The Ceres Beverage Company	Ceres Spring Water	
The Coca Cola Company South Africa	Bonaqua	Glaceau
	Valpré	
Tsitsikamma Crystal	Tsitsikamma Crystal	
Viljoen Beverages	Waterberg Spring Water	
Waterval Minerale	Naturale Minerale	

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Market Trends

Market Trends

Bottled water category continued to grow in both volume and value in 2016. The category recorded volume growth of 4.5% to 502.0 million litres in 2016, yielding an industry value of R6.73 billion for the year. The category sold at an average price of R13.42 per litre in 2016 compared to R12.99 per litre in 2015.

The category volume growth may be attributed to the following factors:

- Severe drought conditions led to shortages of water in some regions of the country. Consumers were forced to purchase more bottled water for drinking and household use.
- Shortages of clean drinking water from municipal tanks. Some regions received water from municipal tanks but most of the water was not clean enough for human consumption and consumers had to substitute that with bottled water.
- Severe drought and shortages of clean drinking water in neighbouring countries increased the volume of bottled water exported.
- An increase in the number of new players entering the market. Most regions experienced an influx of new local players supplying affordable bottled water products.
- An increase in promotional and marketing activities. It is hypothesised that an increase in product awareness increases usage.
- An increase in health awareness regarding sugar drinks. It is believed that the bottled water category is taking volume share over alternative beverages that are perceived to be less healthy.
- Shifts from other non-alcoholic beverage categories that are higher priced compared to bottled water, particularly as consumer spending remains under pressure

The category continued to be dominated by still unflavoured water. This sub-category is supplied by a variety of players in the market and is available in larger pack sizes. Consumers utilise this water for both consumption and household purpose, depending on the need. The functional water sub-category lost volume share, possibly due to pricing and depleted consumer spending on products perceived as luxury items.

Market Trends Cont.

The retail industry continued to dominate the product distribution. The combined bottom and top end retail channels accounted for 56.8% of total volume sold in 2016. These sectors are characterised by promotional and marketing actives and are able to attract a large customer base. They have a wide variety of brands and products that customers may select from. The wholesale channel also showed a relative good growth in volume, driven by larger pack sizes and bulk packages.

The regional distribution of bottled water changed significantly in 2016. The category experienced high volume demand in regions that were affected by drought compared to the three metro regions. Players also focused more on areas close to their production plants in order to cut distribution costs, as bottled water margins are considered low compared to other non-alcoholic beverages.

Rigid plastic remained the favoured packaging material within bottled water industry. This pack format accounted for 97.8% of the total volume sold in 2016. There is a plethora of rigid plastic bottle suppliers in the market and the packaging is easy to transport and handle.

Bottled water category volumes are expected to grow by between 2-3% year-on-year in the short to medium term. The comparatively low growth forecast may be attributed to limited economic growth and consumer disposable income, as well as steep competition from other beverage categories.

Executive Summary

Total Market Volume & Value

Year	Volume (Million Litres)	Volume % Change p.a	Value (R Million)	Value % Change p.a
2012	415.1	4.5%	R 5 141.40	12.2%
2013	426.6	2.8%	R 5 287.60	2.8%
2014	444.1	4.1%	R 5 612.90	6.2%
2015	480.5	8.2%	R 6 240.70	11.2%
2016	502.0	4.5%	R 6 734.80	7.9%

The bottled water category grew in both volume and value from 2015 to 2016. The industry growth may be attributed to severe drought in most regions as well as shortages of clean drinking water. The number of companies supplying bottled water also increased, affecting the volume positively.

Note: Volume Includes Exports
The category value in this report has changed as an improved methodology of calculating on-consumption pricing has been applied

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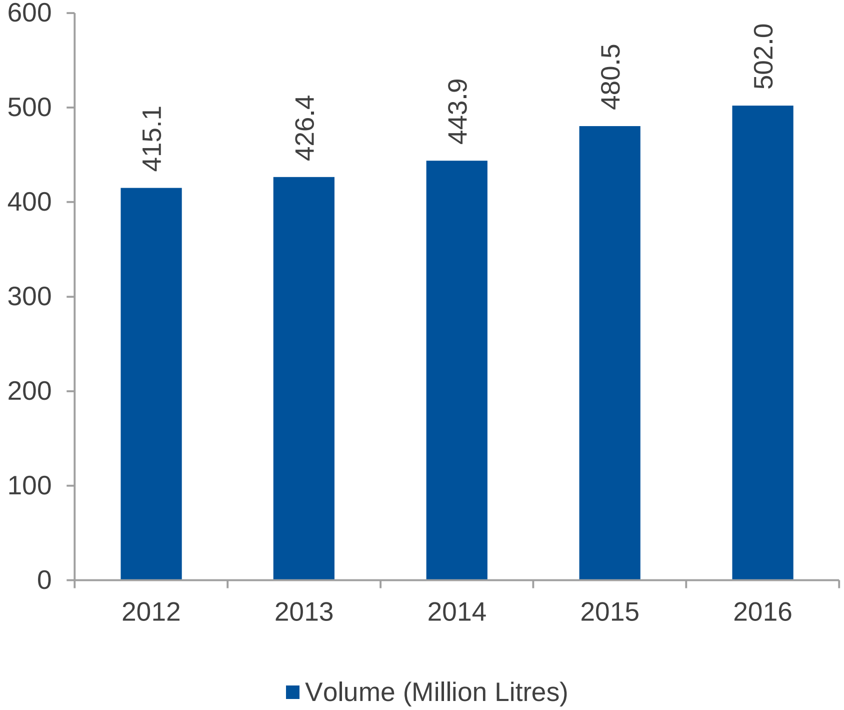
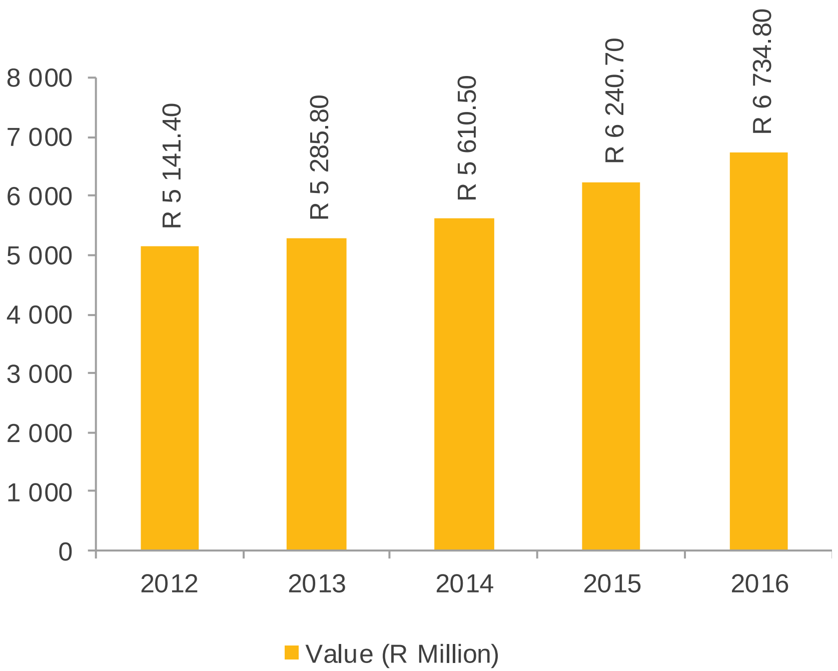
Total Market Volume & Value

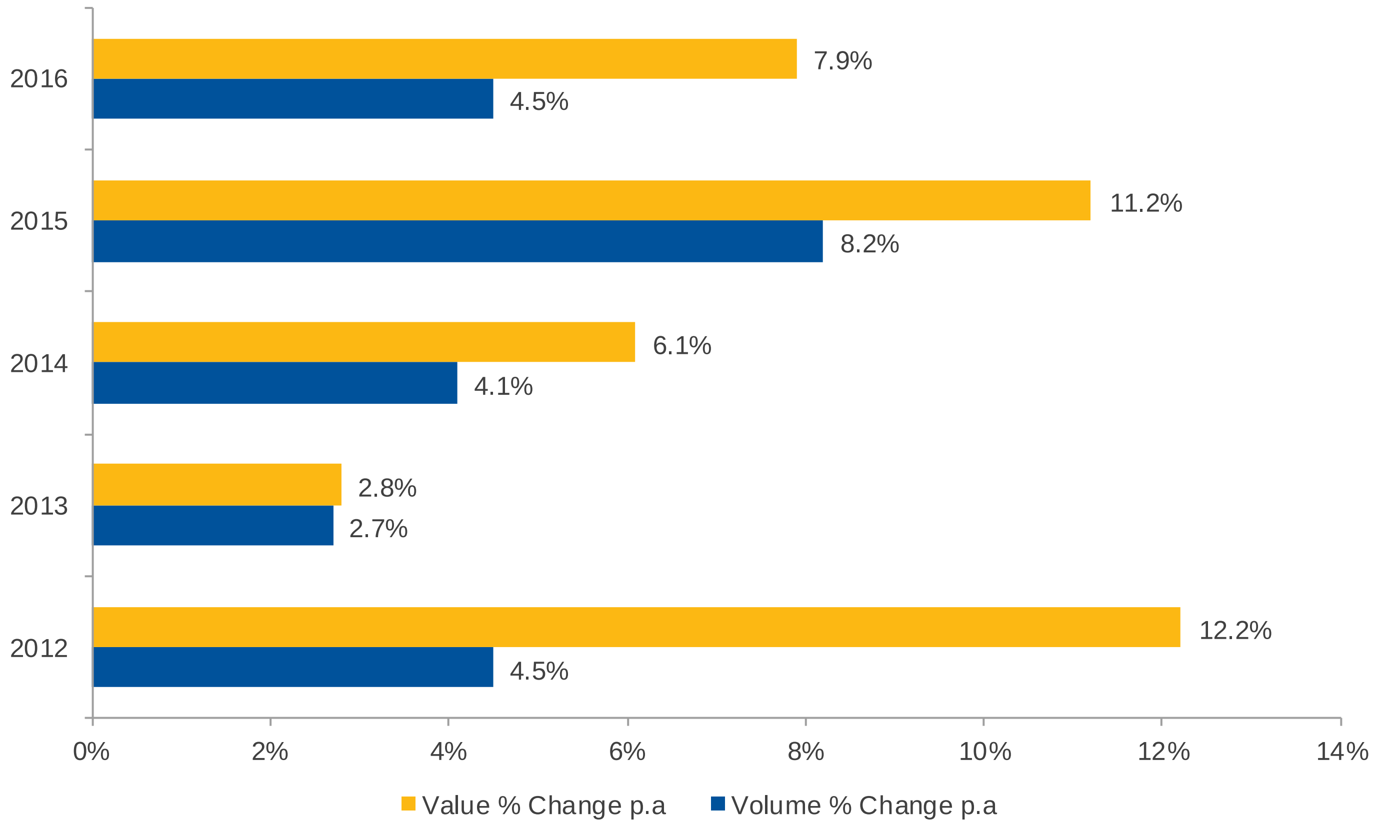




The growth in industry value was attributed mainly to the increase in volume as the average selling price increased saw only limited growth.

Note: Volume Includes Exports
The category value in this report has changed as an improved methodology of calculating on-consumption pricing has been applied

Volume & Value Trends



The bottled water category has performed well both in volume and value terms in the last five years.

Note: Volume Includes Exports
The category value in this report has changed as an improved methodology of calculating on-consumption pricing has been applied

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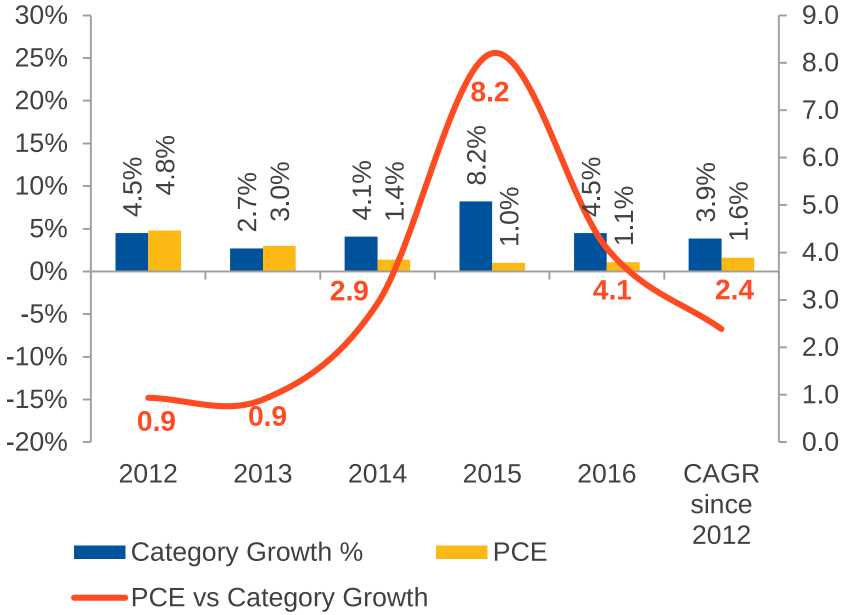
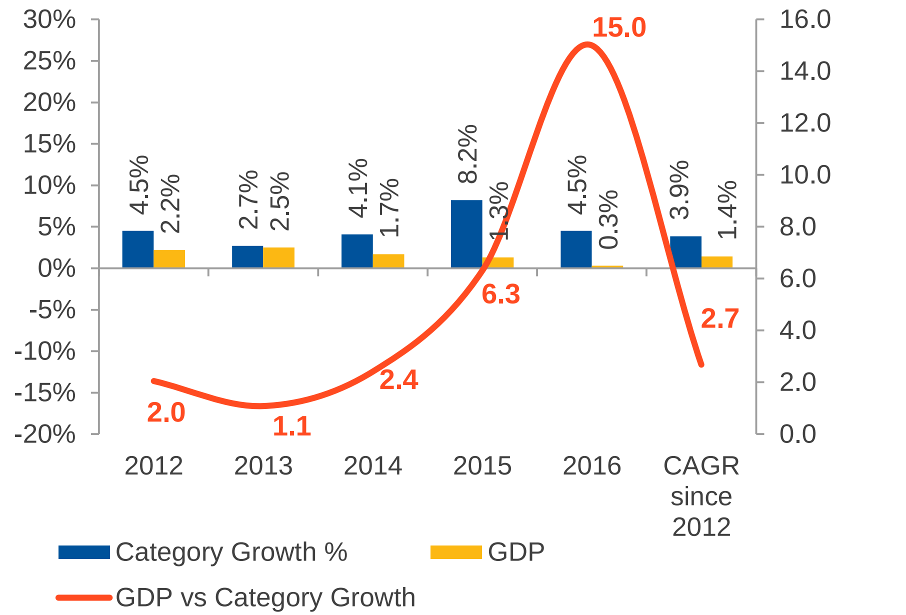
Market Performance vs Economic Indicators

Bottled Water		
Category Value - Rm	GDP Value - Rm	Contribution to GDP
R 6 734.80	R 4 336 991.52	0.2%





The bottled water category grew at a higher rate compared to GDP and PCE indices. This trend is expected to continue in the short term as the economy struggles to grow and consumer spending remains under pressure.

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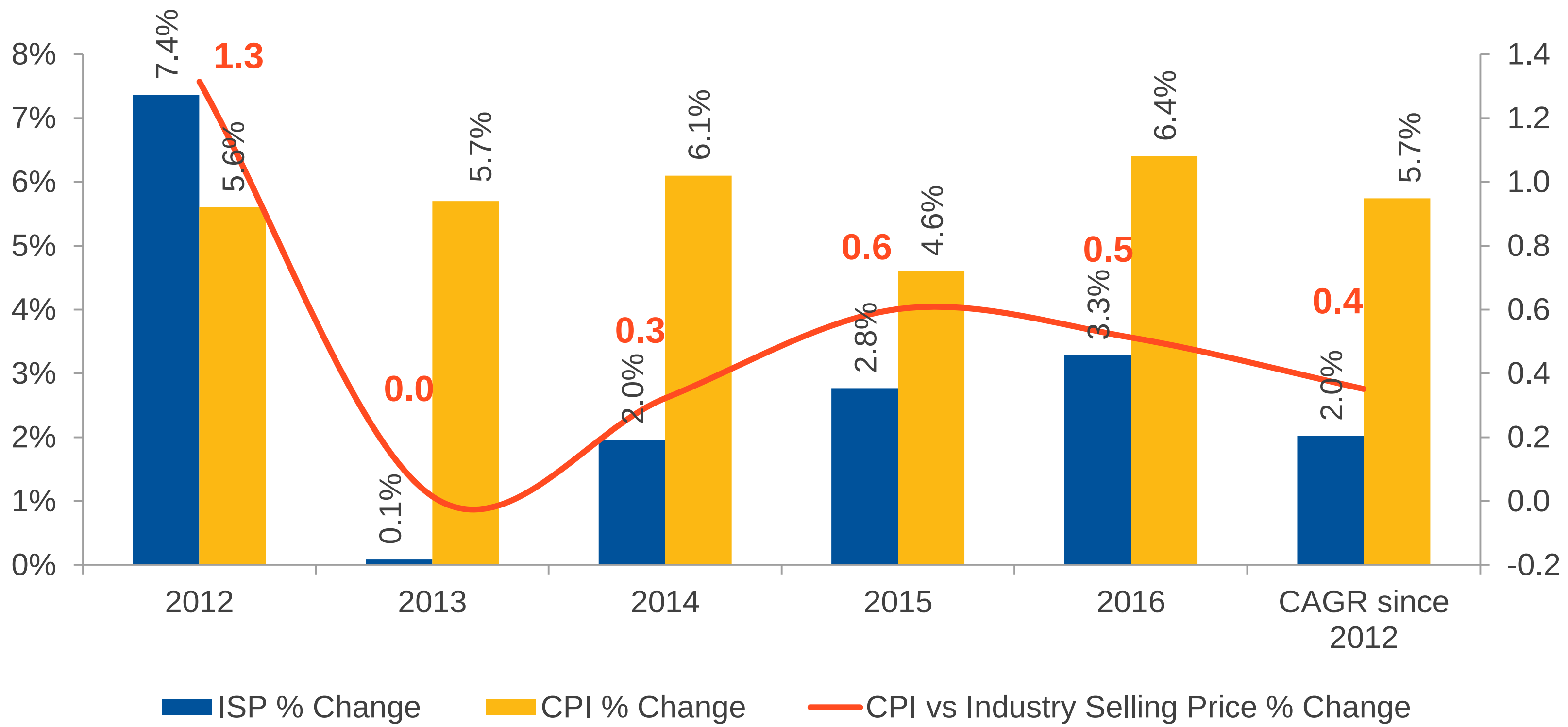
Market Performance vs Economic Indicators

Industry Selling Price (ISP) vs CPI



The average industry selling price grew at a lower rate than the CPI index in 2016. The emergence of value brands and pack sizes were some of the factors contributing to the limited growth in the industry selling price.

Note: The category ISP in this report has changed as an improved methodology of calculating on-consumption pricing has been applied

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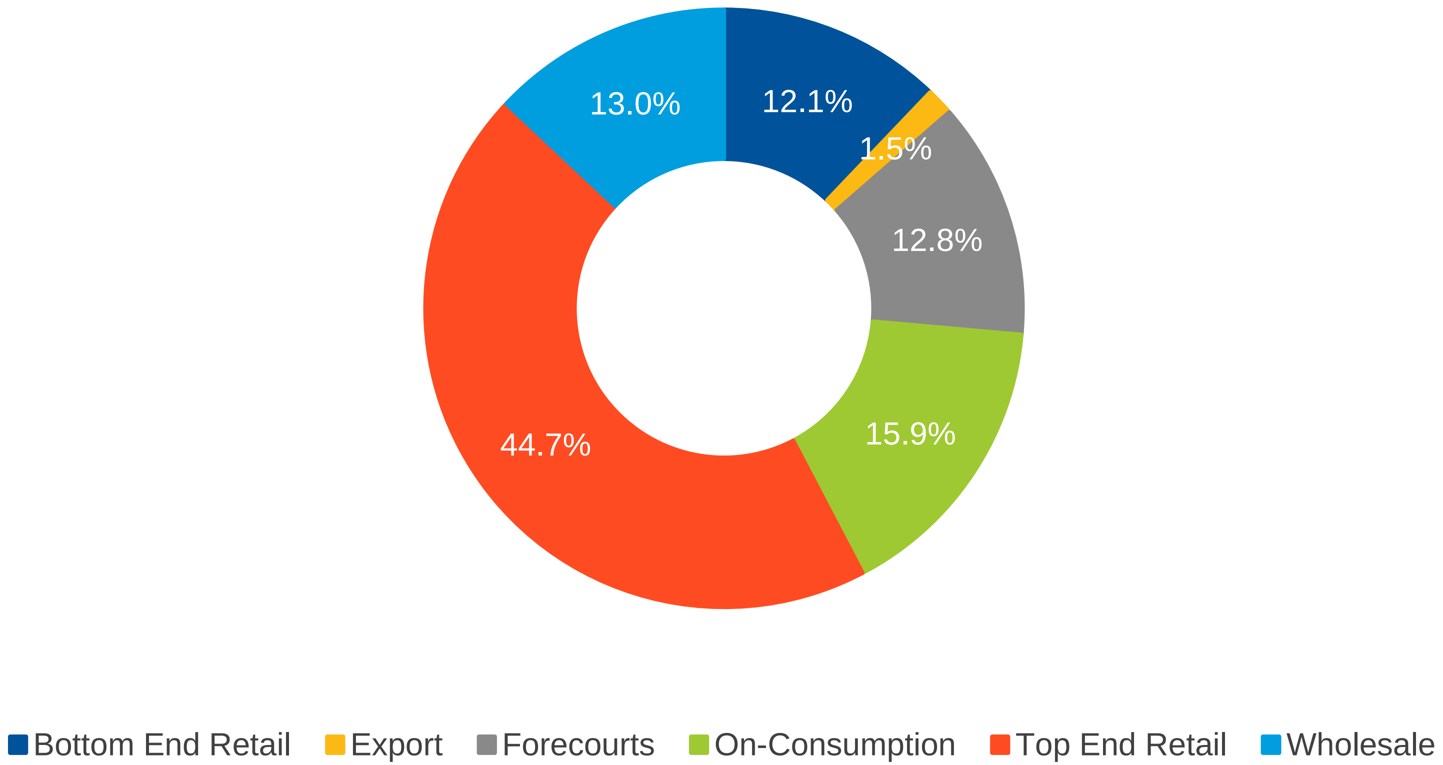
Channel Distribution 2016

502.0 Million Litres



The retail sector accounted for 56.8% of the total volume sold, down from a 57.2% share in 2015. The decline in retail volume share may be attributed to an increase in exports and wholesale volumes, as manufacturers looked for new markets and distribution channels.

Total may not add up due to rounding differences

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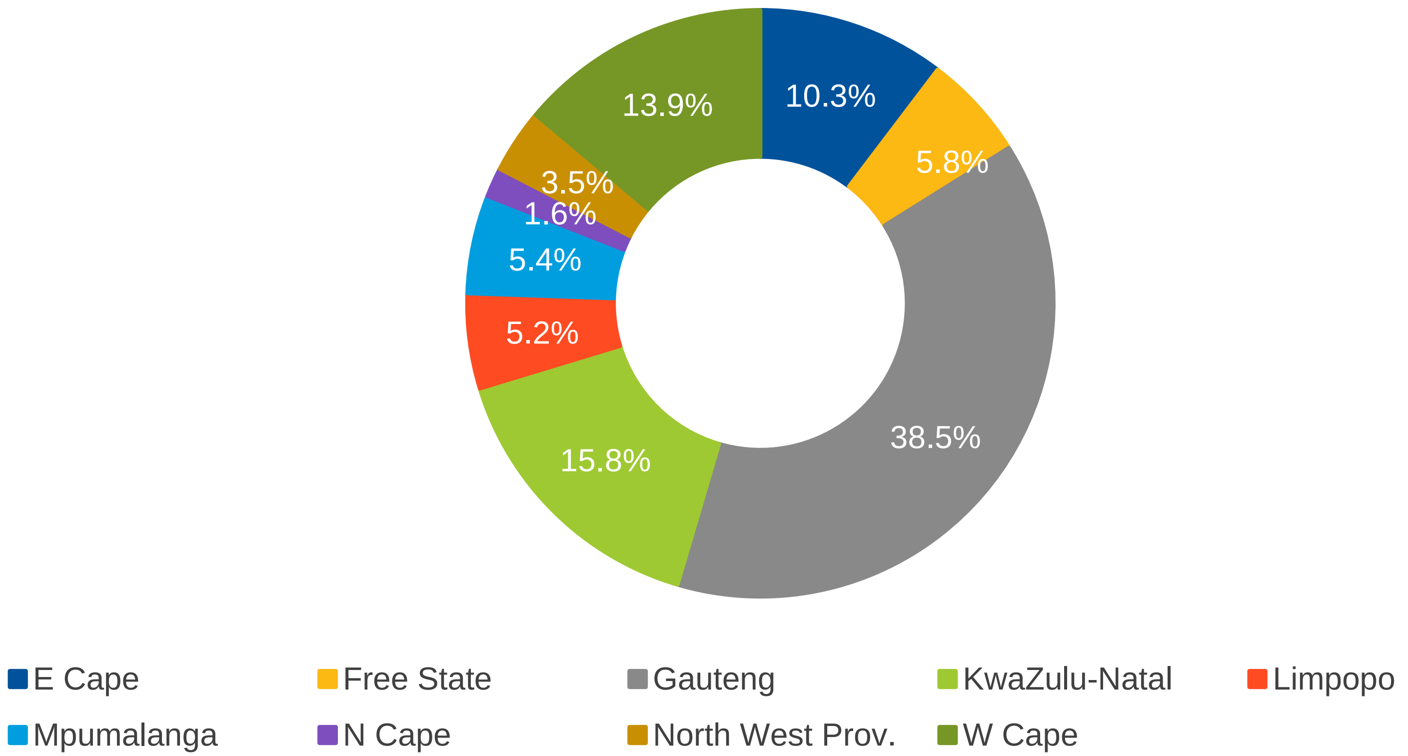
Local Regional Distribution 2016

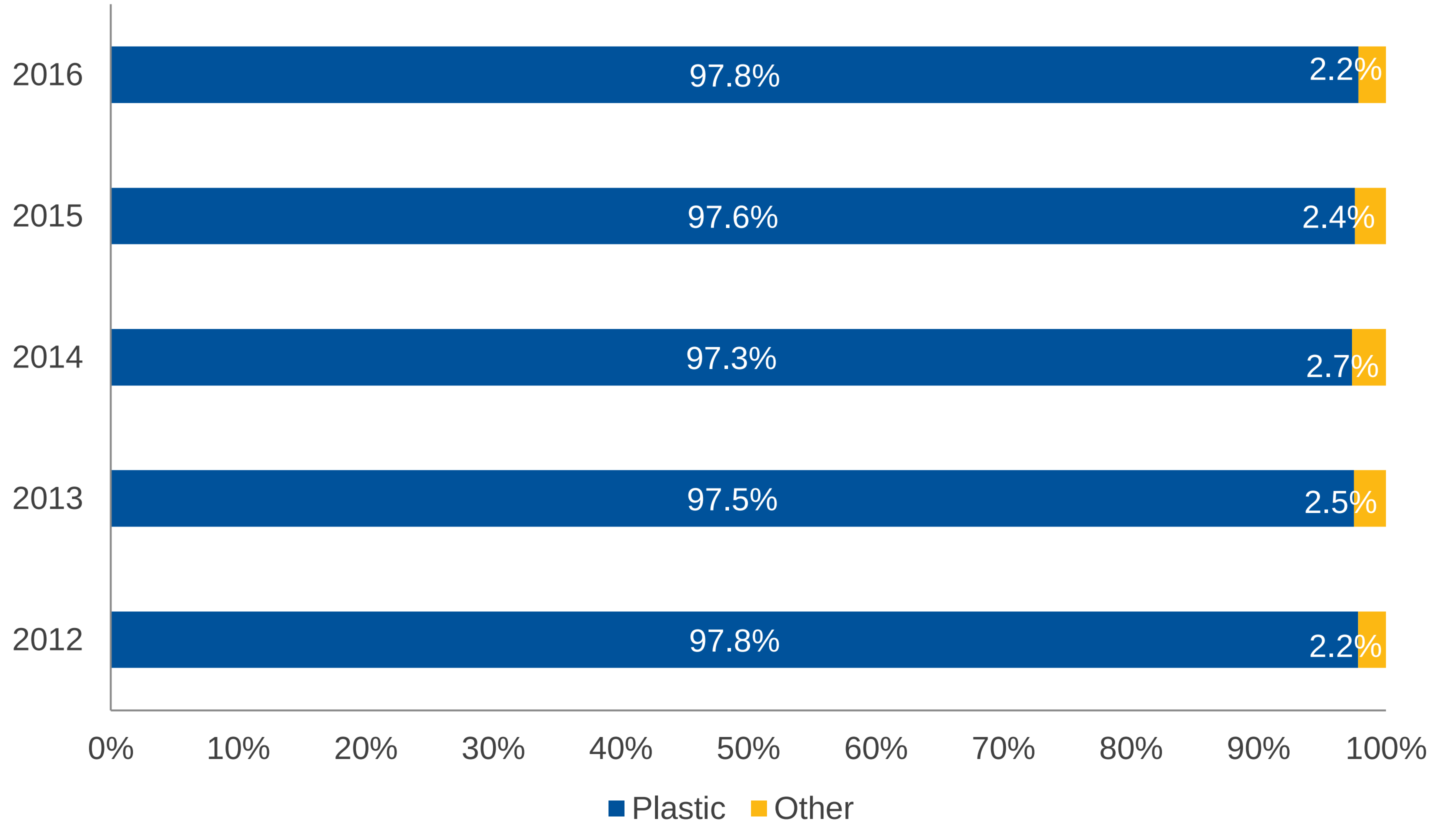
492.3 Million Litres



The Gauteng region accounted for 38.5% of the total volume sold in 2016, followed in share terms by KwaZulu-Natal and the Western Cape. Consumers in these regions have above average disposable income and are more likely to be able to afford bottled water. The non-major metropolitan regions accounted for 31.9% of volume in 2016 compared to 30.5% in 2015. The increase in volume may be attributed to shortages of clean drinking water in these regions.

Excludes exports
Total may not add up due to rounding differences

Historical Pack Type Trends

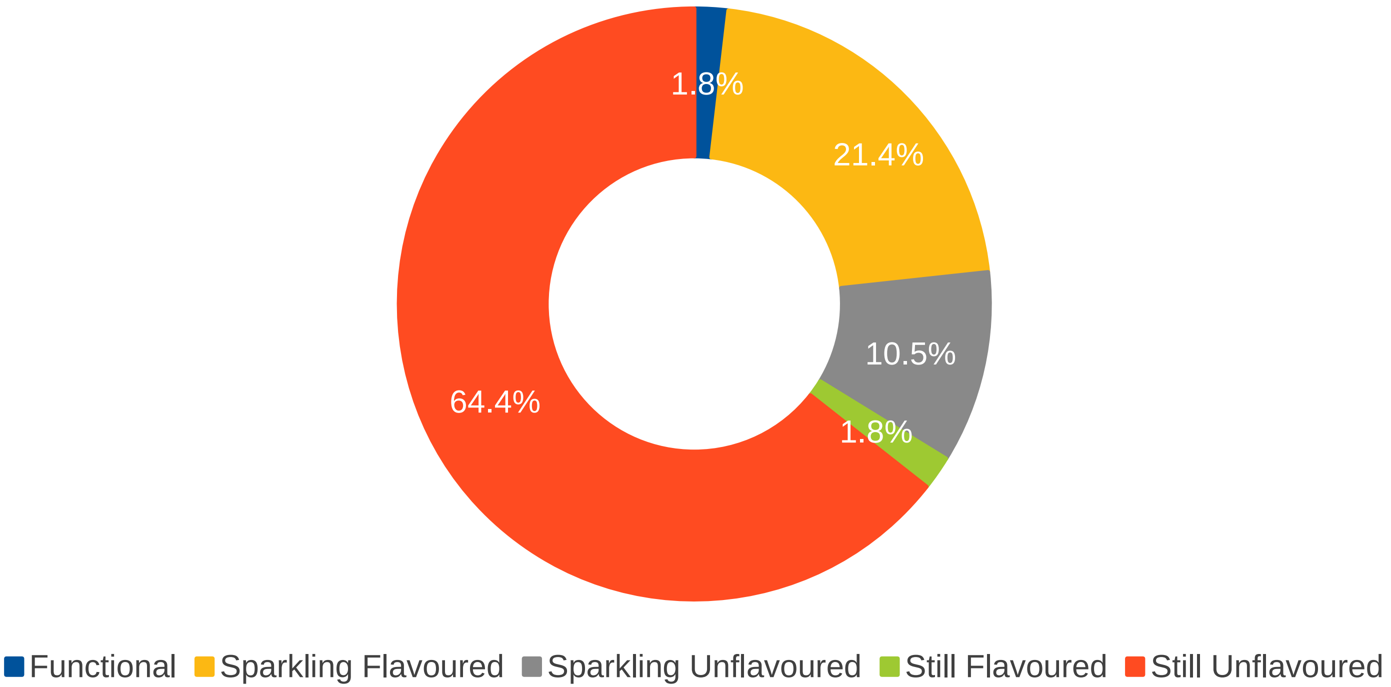


Other packaging materials lost share in 2015 and again in 2016. Plastic packaging is available from a plethora of suppliers at a reasonable price compared to 'other' pack formats.

Please note due to rounding percentages may not add up

Market Breakdown 2016

502.0 Million Litres



The still unflavoured water sub-category accounted for 64.4% of total volume sold in 2016, up from 64.0% sold in 2015. It is hypothesised that the sub-category took share from functional and sparkling water during the period under consideration as consumers needed water for household use given the municipal water shortages.

Note: Volume Includes Exports

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Market Size

Total Market Size for Bottled Water

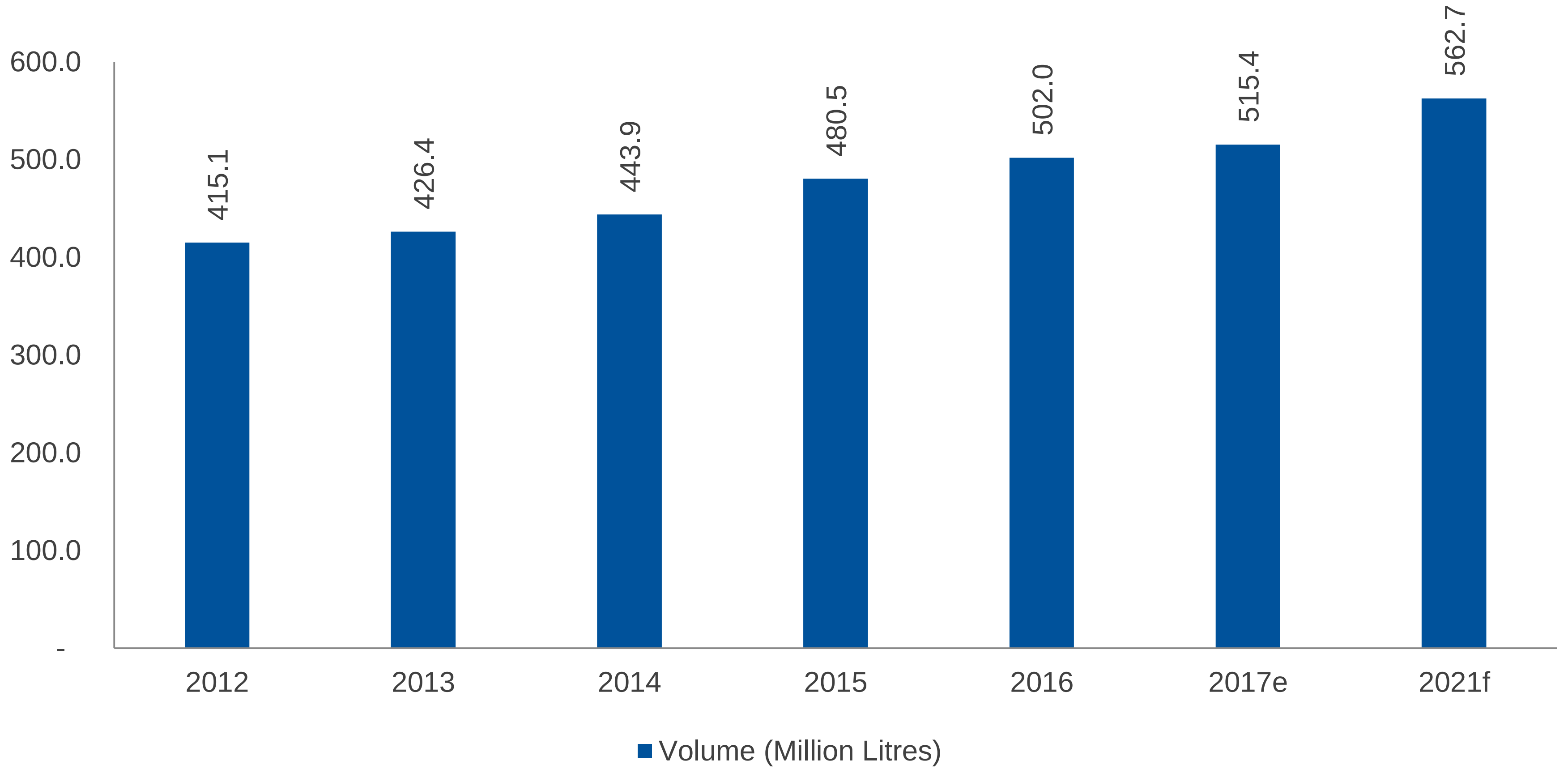
Year	Volume (Million Litres)	Volume % Change p.a
2012	415.1	4.5%
2013	426.4	2.7%
2014	443.9	4.1%
2015	480.5	8.2%
2016	502.0	4.5%
2017e	515.4	2.7%
2021f	562.7	2.2%

The bottled water category is expected to grow by 2.7% in volume in 2017. The low economic growth and limited consumption expenditure are some of the reasons for limited volume growth in future.

Note: Volume Includes Exports

Total Market Size for Bottled Water

Million Litres



Note: Volume Includes Exports

Per Capita Local Consumption

Year	Population (Million)	Volume (Million Litres)	Per Capita Consumption (Litres)	Per Capita Consumption % Change p.a
2012	52.5	414.2	7.9	2.6%
2013	53.3	424.3	8.0	0.9%
2014	54.1	439.9	8.1	2.1%
2015	55.0	475.2	8.6	6.3%
2016	55.9	494.7	8.8	2.4%

The local per capita consumption increased by 2.4% to 8.8 litres per person in 2016. The per capita consumption is expected to decrease slightly as the industry grows at a slightly higher rate than population size that is expected to grow at less than 1.5% year-on-year.

Excludes Exports
Source of Population number: Stats SA

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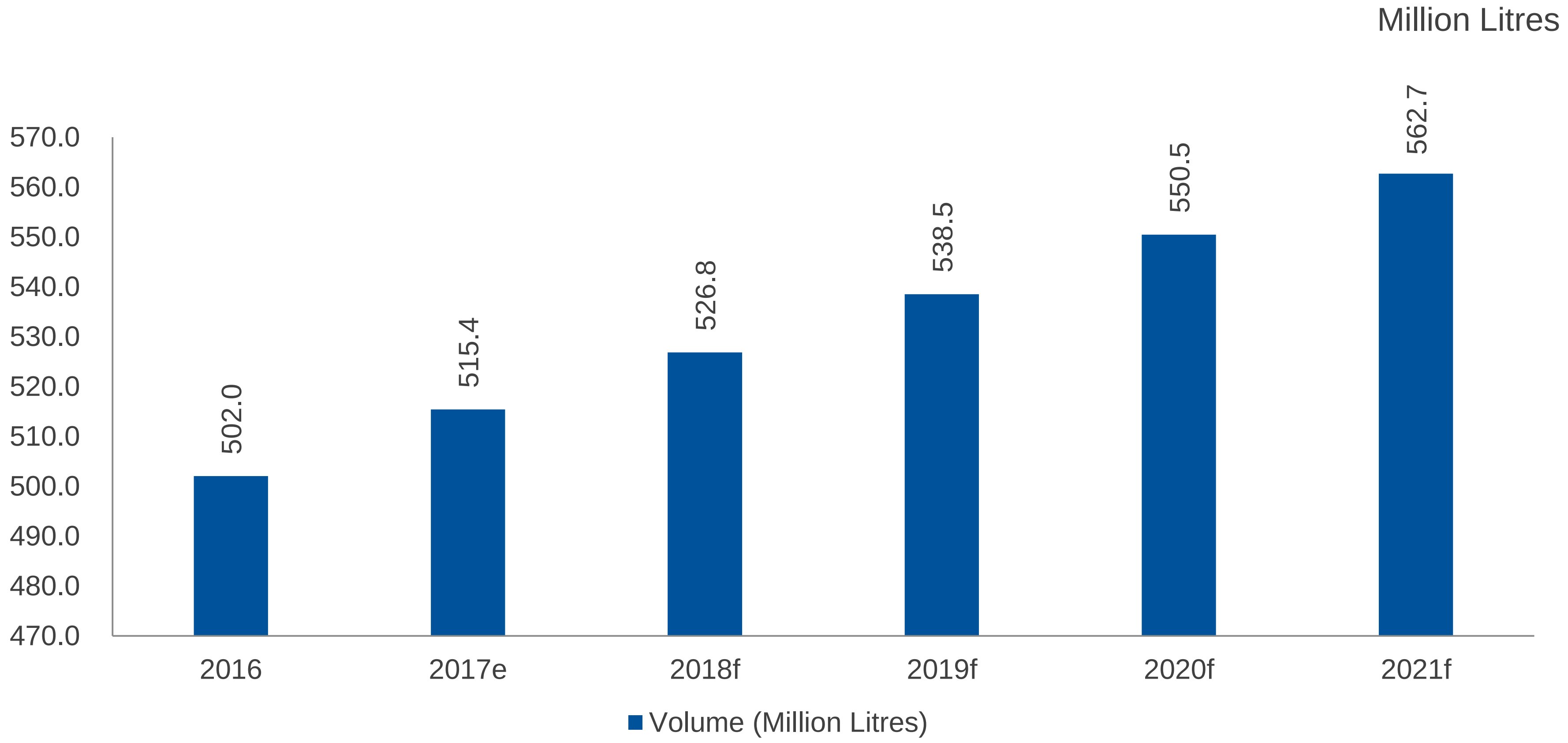
Production Forecast



The bottled water industry is expected to grow at an average rate of 2.2% from 2017f to 2021f as the economy struggles and municipal dam levels recover.

Note: Volume Includes Exports

Historical Industry Selling Price

Year	Industry Selling Price (R/Litre)	ISP % Change
2012	R 12.38	7.4%
2013	R 12.40	0.1%
2014	R 12.64	2.0%
2015	R 12.99	2.8%
2016	R 13.42	3.3%

The average industry selling price increased by 3.3% to R13.42 per litre in 2016 compared to 2015. The limited category inflation may be attributed to increased demand for larger pack sizes and bulk packs that are cheaper in Rand per litre terms. The smaller pack sizes, that command a higher value, were under pressure in 2016.

Note: Price represents a weighted average selling price across all channels
The category ISP in this report has changed as an improved methodology of calculating on-consumption pricing has been applied

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Media Releases

Media Releases

Flavoured water is full of sugar

Proposed tax

Sugary drinks have become so accepted in South African culture that many people are drinking far too many of them. This is according to Dr Jacques Snyman, director of product development at Agility Global Health Systems for Africa, who was responding to the mooted tax on sugar-sweetened beverages. The proposed tax, to be introduced from 1 April 2017, will be levied on sugar-sweetened beverages such as soft drinks, fruit juices, sports/energy drinks, and vitamin waters, sweetened ice tea, lemonade, cordials and squashes.

“We are often told that adults should drink around two litres of water per day to stay adequately hydrated and help cleanse the body of impurities,” said Dr Snyman. He pointed out that many people erroneously assume that flavoured waters have much the same health benefits as drinking still, sparkling or ordinary tap water.

“Flavoured water, however, is no substitute for pure water as it usually contains flavouring chemicals and plenty of sugar. In short, ‘flavoured water’ is usually no more than a clever marketing trick to promote fizzy drinks, which have had bad press in recent years as they have been linked to obesity,” said Dr Snyman.

In recent years, flavoured waters and mass produced iced teas have grown considerably in popularity in the South African market. While these may initially appear to be healthier alternatives to sugar-laden fizzy drinks, the nutritional information of such products often tell another story. Dr Snyman added that sugar-free fizzy drinks also have their drawbacks, with some studies suggesting that they might, perversely, stimulate cravings for calorie-rich foods.

Informed decisions

Dr Snyman says there are healthier alternatives to these drinks that are just as delicious and satisfying as their calorie-laden counterparts. Plain cold water can be enhanced with slices of citrus fruit, cucumber or herbs, such as mint or lemon verbena. Lemon juice in water, whether hot or cold, is refreshing and mildly energising. When you are in need of a more substantial energiser, try unsweetened green tea. Instead of fruit juice, try making your own smoothies by blending whole fruit with ice and unsweetened yogurt.

http://www.health24.com/Diet-and-nutrition/Beverages/flavoured-water-is-full-of-sugar-20160302

Media Releases

aQuellé

http://www.tourdurban.co.za/sponsors/

Media Releases

Nature Zone launched new INFUZION range

July 2016

Just launched our exciting new INFUZION range this week! Our pristine still mineral water infused with just a hint of flavour. No CO2, sugar, sweeteners, carbs, calories, colourants, nothing! The product is available in the following hints of flavour:

- *Ginger&Lime*
- *ZestyLemon*
- *KiwiLitchi*
- *YellowCling*

Look out for it on the shelves.

https://www.facebook.com/naturezonewater/

Media Releases

Thirsti: Buy a 750ml Thirsti^{TM} and Stand a Change to Win a Mini One

To Enter This Competition You Must:

- Purchase a 750ml bottle of Thirsti water
- Enter this promotional competition in your personal capacity and not as a business

The competition commences on 10 November 2016 and ends on 28 February 2017

http://thirsti.co.za/terms/

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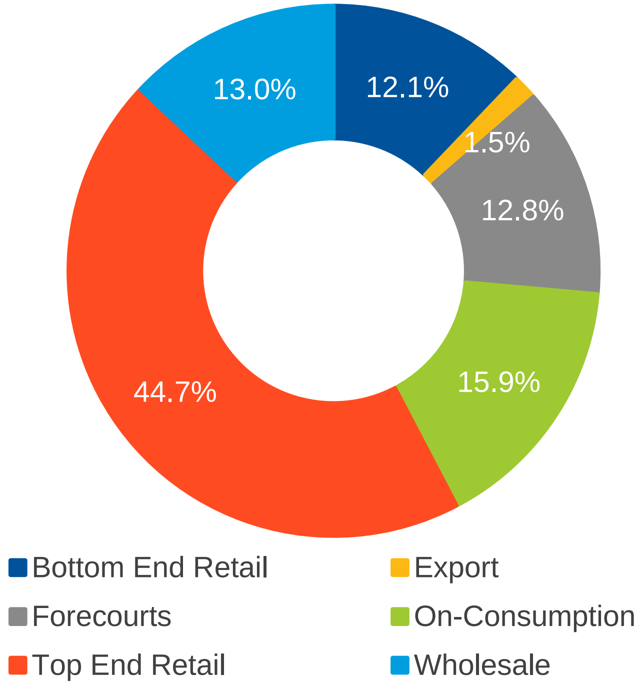
Distribution

Total Market Channel Distribution

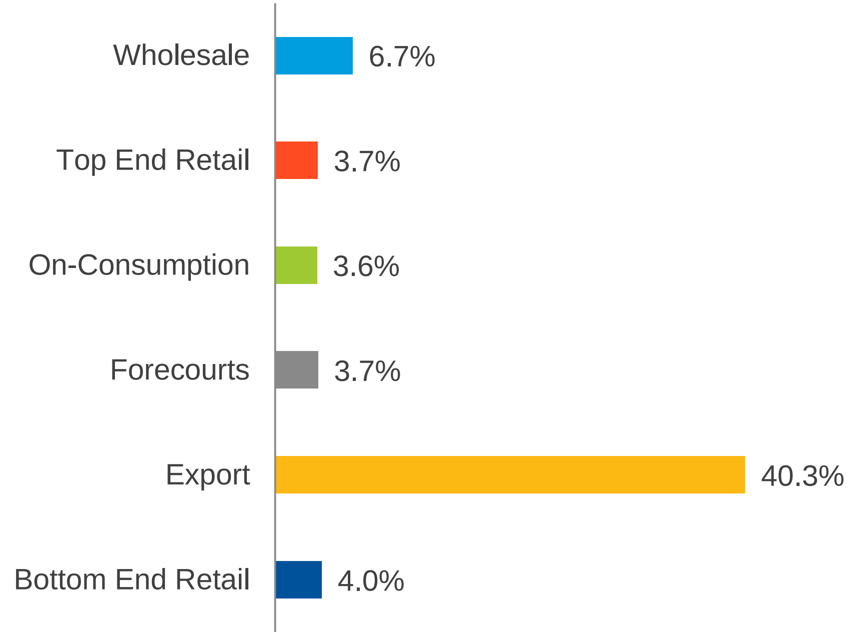
2016 Total Channel Distribution

502.0 Million Litres



Total Channel Distribution

% Growth 2015 - 2016

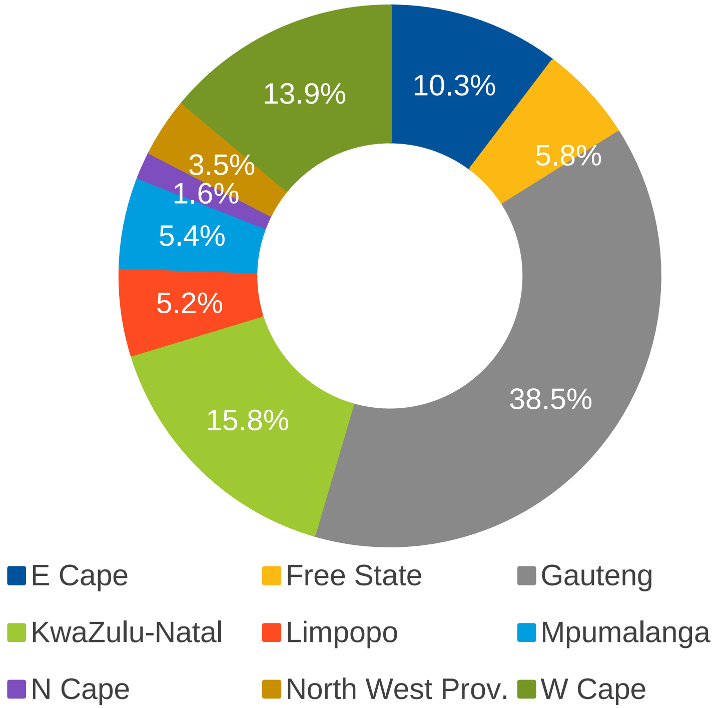


The wholesale channel showed the second largest gain in volume from 2015 to 2016. This channel is characterised by larger pack sizes and bulk packs that are more affordable. Some of the retailers increased their repertoire of brands and stocked larger pack sizes in order to compete with wholesalers. Export volumes increased significantly as neighbouring countries also suffered severe drought and shortages of clean water.

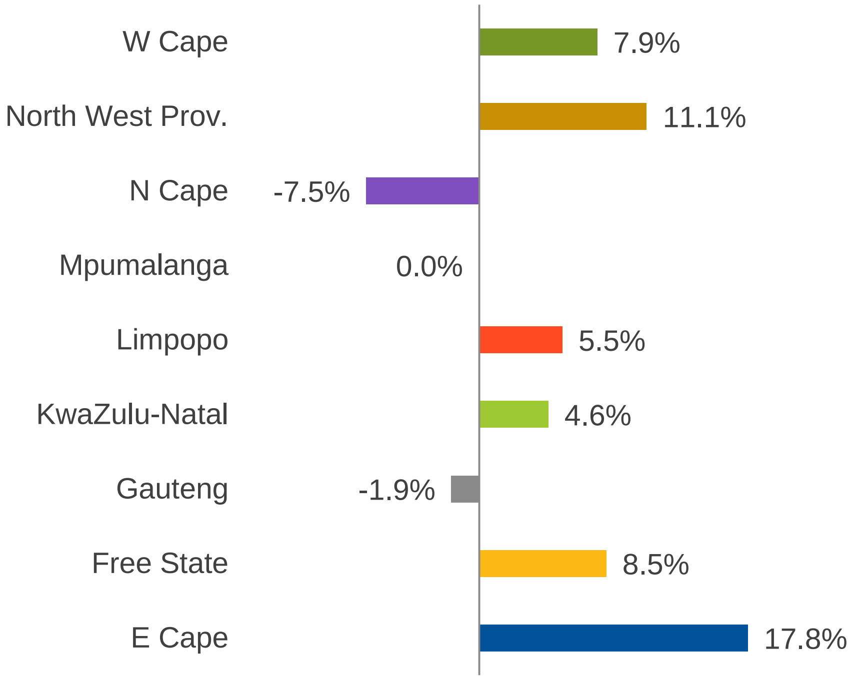
Note: Volume Includes Exports

Total Market Local Regional Distribution 2015

2016 Total Regional Distribution
492.3 Million Litres



Total Regional Distribution
% Growth 2015 - 2016



Most of the non-major metropolitan regions that were affected by drought and experienced water shortages and gained volume share in 2016. Gauteng lost 1.9% of its volume share to these regions. It is believed that these provinces used larger pack sizes for drinking and other household purposes as the water supply from local municipalities was intermittent or not safe for human consumption.

Excludes exports

Packaging Demand

Primary Packaging Demand 2016

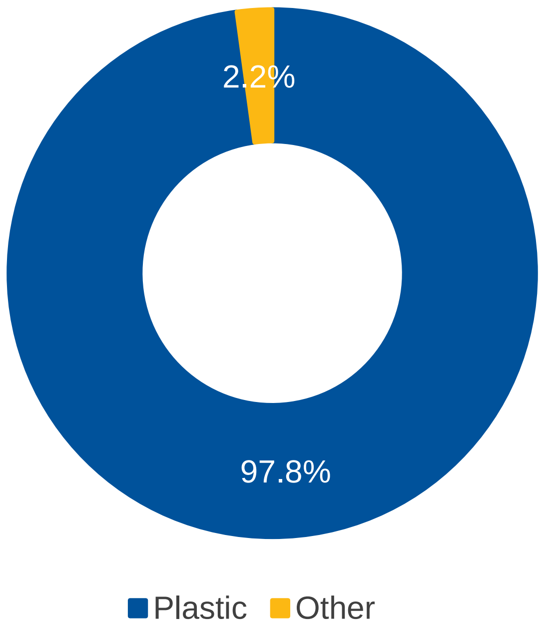
Pack Type Group	Pack Size Group	2016 Volume (Million Litres)	2016 Units (Million)	% of Total Volume
Glass	Up to 250ml	1.3	5.2	0.3%
	300ml-475ml	0.2	0.7	0.0%
	500ml	5.8	11.5	1.1%
	750ml	2.2	3.0	0.4%
	1 litre	1.3	1.3	0.3%
Glass Total		10.8	21.7	2.2%
Rigid Plastic	Up to 250ml	0.1	0.2	0.0%
	300ml-475ml	13.5	39.7	2.7%
	500ml-550ml	225.7	451.4	45.0%
	750ml	37.6	50.1	7.5%
	1 litre	25.7	25.7	5.1%
	1.25 litre-1.75 litre	150.8	100.4	30.0%
	2 litre-2.7 litre	1.3	0.7	0.3%
	3 litre-5 litre	35.7	7.2	7.1%
	Above 5 litre	0.9	0.1	0.2%
Rigid Plastic Total		491.2	675.5	97.8%
Grand Total		502.0	697.2	100.0%

The 500ml-550ml pack size group packed in rigid plastic accounted for 45.0% of total volume sold in 2016, down from 46.0% in 2015. The pack denomination is believed to have lost share to the larger 3 litre-5 litre group during the drought season. The trend is expected to revert back in the short term.

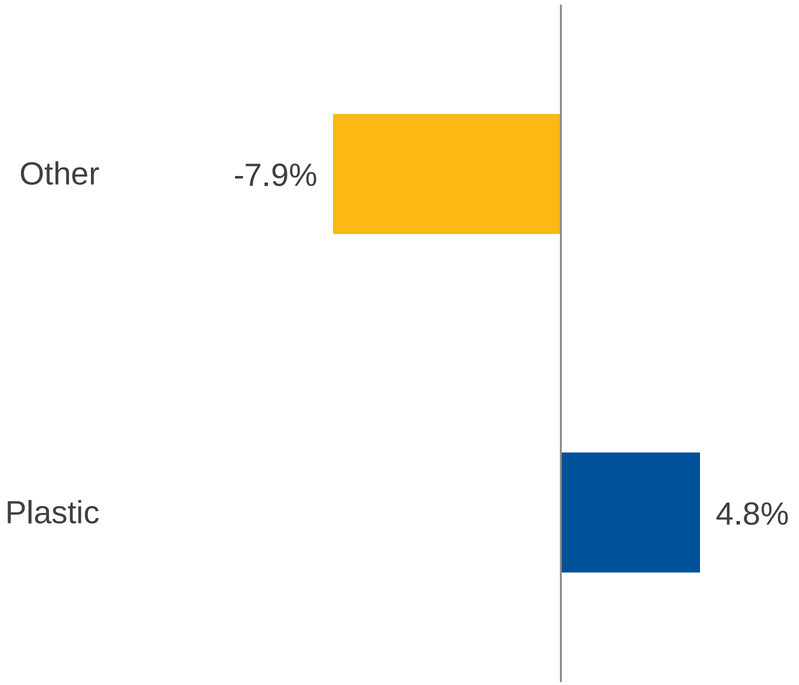
Note: Volume Includes Exports

Primary Packaging Demand

2016 Packaging Demand
502.0 Million Litres



Packaging Demand
% Movement 2015 - 2016



Plastic packaging accounted for 97.8% of total volume sold in 2016, up slightly from 97.6% in 2015. The 'other' packaging materials are used predominantly for premium products. The transportation costs of 'other' packaging are also higher compared to those of plastic and there are a limited number of 'other' packaging material suppliers.

Note: Other includes Glass and Sachet
Note: Volume Includes Exports

Secondary Packaging Demand

Packaging Type	2016 Volume (Tons)	2016 Value (R Million)
Shrink Wrap	407.2	R23 069.22
Corrugated	4 313.8	R66 566.96

Shrink wrap volume usage recorded a growth rate congruent with that of the rigid plastic packaging volume for 2016.

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Packaging Forecast

Primary Packaging Forecast

Pack Type Group	Pack Size Group	2016 Volume (Million Litres)	2016-2017e % Change	2017e Volume (Million Litres)	2017e-2021f % Change	2021f Volume (Million Litres)
Glass	Up to 250ml	1.3	0.9%	1.3	1.2%	1.4
	300ml-475ml	0.2	-2.1%	0.2	4.6%	0.3
	500ml	5.8	-0.7%	5.7	1.5%	6.1
	750ml	2.2	4.6%	2.3	4.1%	2.8
	1 litre	1.3	-6.0%	1.2	-3.0%	1.1
Glass Total		10.8	-0.1%	10.8	1.6%	11.5
Rigid Plastic	Up to 250ml	0.1	6.7%	0.1	5.1%	0.1
	300ml-475ml	13.5	-0.1%	13.5	2.7%	15.0
	500ml-550ml	225.7	1.1%	228.1	2.3%	249.7
	750ml	37.6	13.0%	42.4	2.8%	47.3
	1 litre	25.7	8.6%	27.9	5.4%	34.5
	1.25 litre-1.75 litre	150.8	1.6%	153.3	1.1%	160.1
	2 litre-2.7 litre	1.3	6.8%	1.4	5.8%	1.8
	3 litre-5 litre	35.7	3.9%	37.0	3.1%	41.9
	Above 5 litre	0.9	-5.3%	0.8	1.7%	0.9
Rigid Plastic Total		491.2	2.7%	504.6	2.2%	551.1
Grand Total		502.0	2.7%	515.4	2.2%	562.7

The rigid plastic up to 1 litre packs are expected to be the main driver of overall bottled water category in the medium term as consumers become more health conscious and marketing activities increase. The smaller pack sizes are expected to pick up the volume lost to larger pack sizes during the drought season.

Note: Volume Includes Exports

Secondary Packaging Forecast

Packaging Type	2016 Volume (Tons)	% Change	2017e Volume (Tons)	% Change	2021f Volume (Tons)
Shrink Wrap	407.2	2.7%	418.3	2.2%	456.9
Corrugated	4 313.8	-0.1%	4 310.6	1.6%	4 599.8

Note: Volume Includes Exports

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- Promotional Effectiveness

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Thank you

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