SAMPLE – FICTIONAL COMPANY

Hilltop Spring Water

South African Bottled Water Market

Market overview, trends and competitor review for a new premium spring water brand in KwaZulu-Natal.

Prepared for Hilltop Spring Water, a fictional company. Market facts are cited to public sources. Anything we could not verify is marked "not found" or labelled as an assumption.

Illustrative sample. Page count is not a package promise.

SUMMARY

Key findings

Bottled water is a steady, growing market in South Africa. Big brands lead, but there is room for a local premium brand that serves businesses well.

FIVE THINGS TO KNOW

- **Size:** published estimates range from **US$0.59bn to US$1.29bn** a year. Sources disagree because they measure different things.
- **Growth:** forecasts sit between about **2.6% and 5.8% a year**.
- **Demand driver:** trust in tap water is low. **46%** of water supply systems had poor or bad microbiological quality in official tests.
- **Prices:** a 500ml still water costs from about **R5 (in a 24-pack) to R14** (single bottle) online.
- **Opportunity:** a KZN-bottled brand priced near **R11.99** could sit between value and premium brands.

Recommendations in brief

1. Lead with "local"

Bottled in KZN, for KZN. Make freshness and short supply chains the story.

2. Win businesses first

Gyms and offices buy every week. They value service more than the lowest price.

3. Price in the middle

Above value brands, below Valpré. Avoid a price war with national players.

CONTENTS

1. Market overview 3
2. Key trends 4
3. Competitor profiles 5
4. Pricing and positioning 6
5. Customer profile, opportunities and risks 7
6. Recommendations and sources 8

SECTION 1

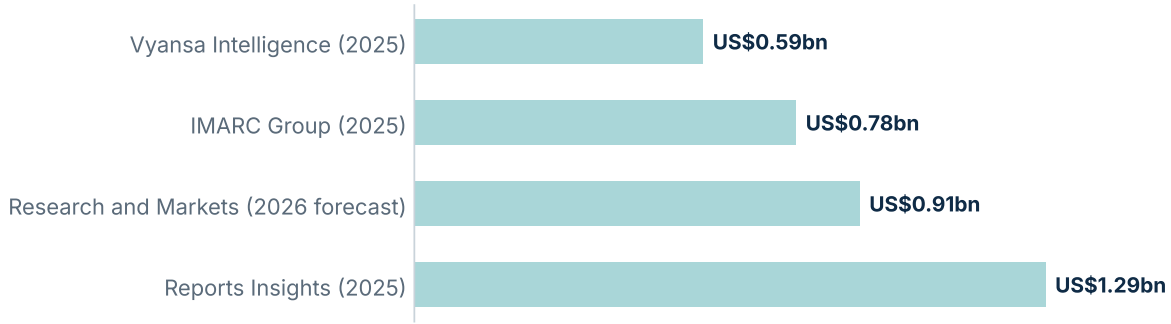
Market overview

There is no single agreed figure for the size of the market. We show what each published source says and what that means for a small brand.

KEY TAKEAWAY

Even the lowest estimate (Vyansa, about US$0.59bn) is many times larger than a small regional brand needs. Market size is not the limit – distribution is.

Published market size estimates



Source	Value	Link
Vyansa Intelligence (2025)	US$0.59bn	https://www.vyansaintelligence.com/industry-report/south-africa-bottled-water-market-analysis
IMARC Group (2025)	US$0.78bn	https://www.imarcgroup.com/south-africa-bottled-water-market
Research and Markets (2026 forecast)	US$0.91bn	https://www.researchandmarkets.com/reports/5952712/south-africa-bottled-water-market-strategic
Reports Insights (2025)	US$1.29bn	https://www.reportsinsights.com/quants/research/bottled-water-market/south-africa

Growth forecasts: Vyansa about 2.6% a year (2026–2032); Technavio 2.7% (2025–2030); Research and Markets 4.1% (2026–2031); Reports Insights 5.27% and IMARC 5.81% (2026–2034).

Volume

SANBWA, the national bottled water association, quotes BMI Research: **596.9 million litres** were sold in South Africa in 2018.

https://www.sanbwa.org.za/bottled-water-myths.html

Not found: a free, recent (2024–2026) volume figure. Euromonitor's November 2025 report contains one, but it is behind a paywall.

Where it is sold

Euromonitor's report outline says **supermarkets are the preferred channel** and **retail e-commerce is rising fastest**.

https://www.marketresearch.com/Euromonitor-International-v746/Bottled-Water-South-Africa-43111678/

Not found: a free figure for the KwaZulu-Natal share of national sales.

SECTION 2

Key trends

Six trends shape the market. Most of them help a new, local and well-run brand.

1. Worry about tap water

In the 2023 Blue Drop report, 277 of 958 water supply systems (29%) were in a critical state. 46% had poor or bad microbiological quality.

https://www.gov.za/news/media-statements/water-and-sanitation-releases-2023-full-blue-drop-report-05-dec-2023

2. Healthier drinking habits

Euromonitor notes health and wellness trends affect soft drinks, and that brands are responding to an anticipated change to the sugar tax. Water benefits when people cut sugary drinks.

https://www.marketresearch.com/Euromonitor-International-v746/Bottled-Water-South-Africa-43111678/

3. Private label is growing

Euromonitor reports that "private label players gain greater ground". Retailer own brands, such as Woolworths, compete directly on shelf.

4. Promotions drive still water

Euromonitor reports still water growth "fuelled by promotions and accessibility". Shoppers respond to multipack deals.

5. Online shopping

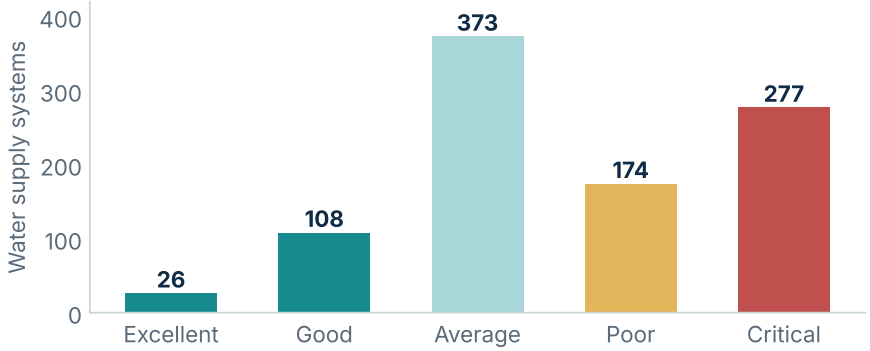
Retail e-commerce is the fastest-rising channel (Euromonitor). Quick-delivery apps list single bottles and packs.

6. Packaging rules

Brand owners placing more than 10 tonnes of packaging a year must take part in Extended Producer Responsibility (EPR), for example through Petco.

https://petco.co.za/producers/

Water quality across South Africa (2023 Blue Drop)



Number of the 958 water supply systems in each performance band. Source: DWS Blue Drop 2023 national report.

SECTION 3

Competitor profiles

We reviewed seven real brands sold in South Africa. Prices are for 500ml still water, read from public web pages on 3 November 2026.

Brand	Per 500ml	Basis and seller	Source URL
Valpré Coca-Cola brand	R13.99	single 500ml Shoprite online	https://www.shoprite.co.za/All-Departments/Drinks/Bottled-Water/Valpr%C3%A9-Still-Spring-Water-500ml/p/10130000EA
Woolworths (own brand) Retailer private label	R12.99	single 500ml Woolworths online	https://www.woolworths.co.za/prod/_/A-20088859
Bonaqua Coca-Cola brand	R11.99	single 500ml Checkers / Shoprite via PriceCheck	https://www.pricecheck.co.za/offers/237463853/Bonaqua+Still+Water+Bottle+500ML
Tsitsikamma Crystal SA spring water, Tsitsikamma (E. Cape)	R6.99	single 500ml Pick n Pay via Mr D	https://www.mrd.com/delivery/groceries/products/110764_EA/tsitsikamma-crystal-still-spring-water-500ml
Thirsti SA spring water brand	R8.99	single 500ml Pick n Pay via PriceCheck (Game: R6.99)	https://www.pricecheck.co.za/offers/187633249/Thirsti+Still+Water+500ML
La Vie de Luc Franschhoek, W. Cape	R8.33	24 × 500ml for R200.00 Brand's own online shop	https://laviedeluc.co.za/products/la-vie-de-luc-24-x-500ml-still
Aquabella Paarl, W. Cape	R5.42	24 × 500ml for R129.99 liquor.co.za	https://liquor.co.za/products/aqua-bella-24×500ml-still-pet

Multipack prices are divided by the number of bottles. Prices change often and vary by store and region.

What each competitor does well

Brand	Strength	Gap Hilltop can use
Valpré	Strong national brand; highest single-bottle price found	Mass-market image; little local KZN story
Bonaqua	Wide reach; sold as purified "prepared" water	Not spring water – Hilltop can stress "natural spring"
Woolworths	Trusted retailer brand; bottled in the Drakensberg for KZN and Gauteng	Only available in Woolworths stores
Thirsti, Tsitsikamma Crystal	Good value; widely stocked	Less premium image
La Vie de Luc, Aquabella	Premium Western Cape spring waters; strong design	Long distance to KZN customers

Not found / not verified: market share by brand (paywalled); bottling location for Valpré, Bonaqua and Thirsti in KZN.

SECTION 4

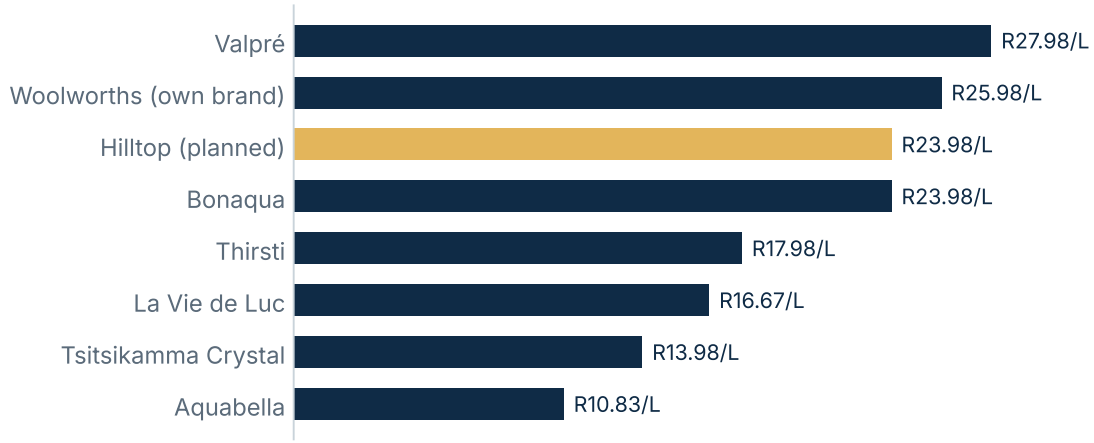
Pricing and positioning

Comparing price per litre makes brands easy to compare, whatever the pack size.

KEY TAKEAWAY

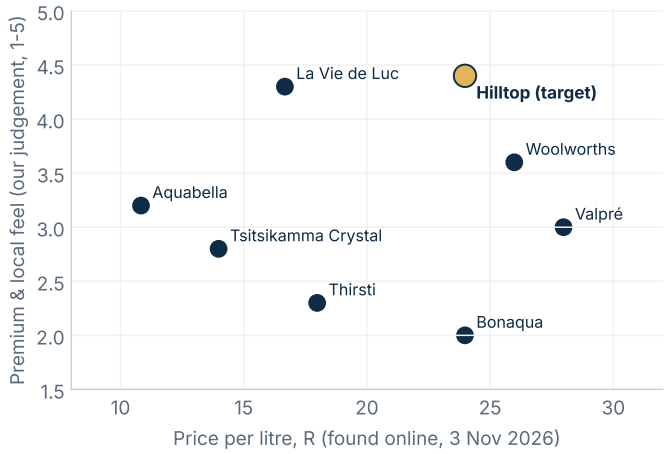
A shelf price of R11.99 (R23.98 per litre) ASSUMPTION places Hilltop level with Bonaqua and below Valpré and Woolworths.

Price per litre, 500ml still water



Gold bar = Hilltop's planned price (an assumption, not a market price). Other bars use the prices in Section 3.

Positioning map



The horizontal axis uses real prices found online. The vertical axis is **our own judgement** of how premium and local each brand feels. It is not survey data.

The top-middle space – **premium and local, at a fair price** – has few players in KZN.

SECTION 5

Customer profile, opportunities and risks

Three buyer types matter most. These profiles are **working hypotheses** to test in interviews, not survey results.

The store owner

Runs an independent supermarket or deli. Wants good margin, fast-moving stock and reliable delivery. Decides in one visit.

The gym manager

Wants cold stock at the front desk and a brand that fits a healthy image. Likes a free branded fridge.

The office manager

Orders water for 20–200 staff. Hates contract lock-ins and late deliveries. Pays monthly.

HYPOTHESES Test with 15–20 short interviews before launch.

Opportunities

- **Low trust in tap water** keeps demand steady.
- **Local story:** few premium brands are bottled in KZN for KZN customers (to confirm in field visits).
- **Office cooler bottles** bring weekly, repeat orders.
- **Gyms** want healthy, branded products to sell.
- **E-commerce and delivery apps** are growing fastest.

Risks

- **Price pressure** from big brands and private label promotions.
- **Retailer power:** chain listings can be costly and slow.
- **Packaging rules and costs** (EPR fees, PET prices).
- **Quality incident** would damage a young brand badly.
- **Power and road disruptions** can stop production or delivery.

Risk summary

Risk	Likelihood	Impact	Response
Price war	Medium	High	Compete on service and local identity
Quality failure	Low	Very high	Daily testing and batch release
Slow retail listings	High	Medium	Start with independents, gyms and offices

Likelihood and impact ratings are our judgement.

SECTION 6

Recommendations

#	Action	Why
1	**Position as "local premium"**	The gap between value brands and imported-feel premium brands is clear on price and image.
2	**Launch with gyms and offices**	Repeat weekly orders, direct relationships, no retailer listing fees.
3	**Price 500ml at about R11.99**	Level with Bonaqua and below Valpré at the prices found. Test it with ten stores first.
4	**Make quality visible**	Show test results and certification. Trust is the reason people buy bottled water.
5	**Plan packaging compliance early**	EPR applies once packaging passes 10 tonnes a year. Budget for it from day one.
6	**Buy the full data before investing**	Brand shares and volumes are paywalled. A Euromonitor report would close these gaps.

Sources

- Vyansa Intelligence (2025): https://www.vyansaintelligence.com/industry-report/south-africa-bottled-water-market-analysis
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- Research and Markets (2026 forecast): https://www.researchandmarkets.com/reports/5952712/south-africa-bottled-water-market-strategic
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- Euromonitor, Bottled Water in South Africa (Nov 2025), report outline: https://www.marketresearch.com/Euromonitor-International-v746/Bottled-Water-South-Africa-43111678/
- DWS 2023 Blue Drop statement: https://www.gov.za/news/media-statements/water-and-sanitation-releases-2023-full-blue-drop-report-05-dec-2023
- DWS Blue Drop 2023 national report: https://ws.dws.gov.za/iris/releases/BDN_2023_Report.pdf
- SANBWA, Bottled Water Myths: https://www.sanbwa.org.za/bottled-water-myths.html
- Petco, Producers: https://petco.co.za/producers/
- Valpré: https://www.shoprite.co.za/All-Departments/Drinks/Bottled-Water/Valpr%C3%A9-Still-Spring-Water-500ml/p/10130000EA
- Woolworths (own brand): https://www.woolworths.co.za/prod/_/A-20088859
- Bonaqua: https://www.pricecheck.co.za/offers/237463853/Bonaqua+Still+Water+Bottle+500ML
- Tsitsikamma Crystal: https://www.mrd.com/delivery/groceries/products/110764_EA/tsitsikamma-crystal-still-spring-water-500ml
- Thirsti: https://www.pricecheck.co.za/offers/187633249/Thirsti+Still+Water+500ML
- La Vie de Luc: https://laviedeluc.co.za/products/la-vie-de-luc-24-x-500ml-still
- Aquabella: https://liquor.co.za/products/aqua-bella-24×500ml-still-pet

Method: desk research of public web pages on 3 November 2026. Hilltop Spring Water is fictional; its plans and prices are assumptions. **Illustrative sample. Page count is not a package promise.**