Country = TH

Project = SD2022

Code = 0

Declassed = 1

Soft Drinks in Thailand

Euromonitor International

GetDate

# Soft Drinks in Thailand

**PASSPORT AUTHOR (COMMISSIONER TO FILL IN HERE):**

## Executive Summary

**Guidelines (to be deleted):** Clients want to know whether the COVID-19 pandemic is still causing disruption, but please also mention any other major developments.

### Soft drinks in 2021: The big picture

* The 3rd wave of covid-19 pandemic has begun from the contagious UK covid-19 and Delta strain which led over thousand to 10-thousand infecting cases since 14 April 2021, with deaths climbing to double and triple digit a day. Several banking research units and other financial institutions have slowed down the expectation of GDP’s growth regarding to the 3rd wave of pandemic. However, the entire economy is expected to recover by the fourth quarter of 2021 or after Thailand secures more covid-19 vaccines supplies. In the meantime, the private companies are still running their business, thanks to the lesson experienced from the first and second waves. For such analysis, the NAD consumers are still expected to have limited purchasing power and the recovery period is projected to delay until the economy is back.
* The tourism segment is now on the sideway and waiting the governmental packages to stimulate both domestic and international tourist once the country is safe. Most of office workers are managed to majorly work from home while the foodservice venues have been restricted to allow only takeaway services until the situation is settle. The beverages products which partially distributed through foodservice channels have been negatively impacted accordingly like carbonates in glass bottle, juice that sold through hotel restaurants and especially the Carbonated Purified Bottled Water, Tonic Water/Other Bitters, and Ginger Ale due to its perception of alcohols’ mixers.

Write key market developments here.

### 2021 key trends

* Both international and domestic players are more focusing on the functional benefits offer in different healthy claims. The vitamin C and B have become the most fashioned development in juice drink and functional bottled water products.
  + There are almost ten brands presented in functional water market in over these consecutive years such as Vitaday, Ichitan Purra, Aquavits and D.r. Drink were introduced along the year 2020 while Vitmores+, Mansome vitamin water and B’lue C200% were lately launched in 2021. At the same time, Yanhee which is the longest lasting brand in vitamin water has developed the new two flavours, lychee and strawberry, to strengthen its presence in healthy product.
  + This sub-category of vitamin C drink is dominated by the domestic brands with C-vitt brand being the first leaders, then followed by Double C and Vitaday consecutively that lately launched in 2018. The major companies from several beverage market has also tapped the market such as Hi! from T.C. Pharmaceutical Industries Co Ltd, Scotch ABC Drink from Scotch Industrial (Thailand) Co Ltd, QminC from TERA Food and Beverage Co Ltd, Camu C from RS Group and Vita One C+ from MN Beverage Co Ltd, which lately introduced in 2020-2021.
* The increasing in-home consumption has accelerated consumers behaviour to temporarily stop consuming on-the-go beverages such as RTD coffee, RTD Tea, energy drinks and sport drinks. Such drinks have been getting most impacted from the lockdown policy because of less activities outside among consumers.

### Competitive landscape

* The sugar tax implemented in 2017, which consisted of an ad valorem tax and a tariff for soft drinks with sugar content of 6g and above per 100ml, it is set for revision every two years over 2017 – 2023. The third phase of tax collection, that supposed to be in effect on October 1st, 2021, has been now postponed to next year to give a further year for consumers in restructuring their strategy during this pandemic. The players the many beverage categories are getting better ready for another taxation by reformulation the products to be unsweetened or sugar reduced.
  + Carbonates: Boon Rawd Brewery Co Ltd, the major players in bottled water market, taps the carbonates market with a launch of Singha Lemon soda and Yusu Lemon Soda in late 2020 and claimed to contain zero sugar. Fanta is becoming the second brand developing the zero-sugar content in an orange and strawberry flavour in February 2021, after the launch of Est Play in 2020.
  + RTD Tea: Lipton is trying to strengthen its leadership by launching 2 New Flavors of Lipton Herbal Blends with 40% Lower Sugar, Free of caffeine to enhance its presence in healthy drink position, along with the zero-sugar version of original product. Oishi Group Plc launched Oishi Genmaicha with high vitamin B claim in both delight and no-sugar version in April 2021 and the premium Oishi Gold Wakoucha that produced from a premium Japanese tea in June 2021.
  + RTD Coffee: Ajinomoto (Thailand) Co Ltd also launched the Birdy Black Zero in April 2021 to respond both new taxation and premiumization trend in one shot. As well as the new products of Nescafe, their product innovation has been raised to hit the premium demand with the Nescafe Barista Style americano coffee in a PET bottle in February 2021 as well as sustained the existing consumers with the Nescafe Triple Expresso in a traditional metal can in April 2021.

### Retailing developments

* While the in-house online shopping that developed by nationwide supermarkets like Tesco, Big C and Tops becomes more popular with an increasing number of daily users, the first leader in convenience shops like 7-eleven is now developing the grocery platform to ease consumers’ life. With over 20-thousand delivery vacancies recruited in 2020, its service witnessed a successful result of huge users.

<https://www.grocerydive.com/news/7-eleven-adds-delivery-providers-as-small-basket-e-commerce-accelerates/587629/>

* The traditional trade channels have partially driven by the governmental campaign that implemented to stimulate the entire economy especially in rural areas. The new cash handout campaign known as “Rao Chana” (We win in the Thai language), which will distribute 3,500 baht per month, for two months in total, to cover 31 million Thai people affected by the Covid-19 pandemic. Additionally, there was a second phase of the ‘Half-Half’ co-payment scheme for 1.34 million new applicants that offers half payment for every purchase not exceeding 300 baht per day. These have effectively been used by millions of Thai people and eventually driven the total sales through traditional shops.

<https://thepattayanews.com/2021/01/19/thai-cabinet-officially-approves-rao-chana-cash-handout-program-and-another-round-of-half-half-co-payment-registration/>

### Foodservice vs retail split

* The second and third wave of pandemic has widely impacted on the virus-infected cities to get stricter controlled by governmental emergency decree. With new lockdowns looming large in the most virus-affected cities, restaurants are allowed to provide only takeaway service for a while, together with the change of consumers’ behaviour to not stay outside for a long time to avoid the risk of infection. As such, the NAD product which targeting restaurants and bakery like bottled water, carbonates, and juice continues having a slower demand and expecting a longer-term recovery.
* Retail channels are increasingly recovered from the lockdown release as well as the consumers shift back from traditional trade to modern trade. However, the recovery period has been lengthened because of limited hours of business time in the third wave infection. To elaborate, the nationwide convenience shops like 7-11 has temporarily adjusted their business hours from 24/7 to 4.00am to 11.00pm and other super/hypermarkets such as Big C or Tesco has been adjusted to 11.00 am to 8.00 pm, such restriction is placed in only the most virus-affected cities which including Bangkok.

<https://www.bangkokbiznews.com/news/detail/932882>

### What next for soft drinks?

Write about the forecast period.

##### Chart Soft Drinks Off-Trade Volume Sales Growth Scenarios: 2019-2026

[Q: PA – Paste Photo 1 here]

Source: Euromonitor International Industry Forecast Model

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

##### Chart Soft Drinks On-Trade Volume Sales Growth Scenarios: 2019-2026

[Q: PA – Paste Photo 2 here]

Source: Euromonitor International Industry Forecast Model

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

##### Chart Soft Drinks Impact of Drivers on Off-Trade Volume Sales: 2018-2026

[Q: PA – Paste Photo 3 here]

Source: Euromonitor International Industry Forecast Model

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

##### Chart Soft Drinks Impact of Drivers on On-Trade Volume Sales: 2018-2026

[Q: PA – Paste Photo 4 here]

Source: Euromonitor International Industry Forecast Model

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

## Market Data

Dynamic tables

## Appendix

### Fountain sales in Thailand

IF FOUNTAIN SALES **ARE AVAILABLE** IN YOUR COUNTRY, TELL US ABOUT PERFORMANCE IN 2021? How have the leading players performed and why (mention strategies and any changes in these due to COVID-19 too)? What will happen over the forecast period? Will any new products or brands appear?

### Trends

* Notes here.

IF FOUNTAIN SALES **ARE NOT AVAILABLE** IN YOUR COUNTRY, TELL US WHY THIS IS THE CASE. What pack sizes and pack types are used instead? Are fountain sales likely to develop in future? Discuss the chance of the arrival of fountains or not over the forecast period.

### Trends

* Notes here.

## disclaimer

Forecast closing date:

Report closing date: [Q: CA to fill in dates here]

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

## Sources

Sources used during the research included the following:

Dynamic table

Country = TH

Project = SD2022

Code = 02

DocClassID = 2

Carbonates in Thailand

Euromonitor International

GetDate

# Carbonates in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

* Comment on the main story within the category in 2021
* State 2021 off-trade value growth and off-trade volume growth with data
* Comment on 2021 on-trade volume growth versus off-trade volume growth if applicable with data
* Comment on the competitive environment in 2021 with off-trade value data
* Comment on forecast period CAGR off-trade value and off-trade volume growth with 2026 data

## 2021 Developments

Cover key trends below, making reference to any ongoing impact COVID-19 is having on the category and consumer spending/purchasing patterns in 2021 where relevant. Also consider covering competitive landscape (company strategy and interesting new product development) and changing distribution trends, alongside any other major developments.

### Stagnant performance of zero-sugar carbonates

* The zero-sugar category sees the highest opportunities across carbonates market. Consumers are now seeking for the healthier choice while they are enjoying the drinks when it comes to carbonates. Plus, many companies are more focusing on the no-sugar content in the product development in order to both respond to the new sugar tax policy as well as grasp the healthy demand.

### Alcohol’s mixers face big challenge in on-trade

* Tonic Water/Other Bitters, and Ginger Ale seems to get most impacted from the lockdown and closures policy. The entertainment venues have been controlled for several months caused by the lockdown measures implemented to prevent the 3rd covid-19 wave.

### Carbonates recovery will delay due to 3rd wave of infection

* Carbonates through on-trade channel seems to slowly recover since the national lockdown policy has been ended in some areas. However, the third wave of Covid-19 infection that notified to be strongest with over ten-thousand cases a day has strengthen the restriction to cover the high-risk provinces once again. The restaurants and public venues have been forced to temporarily close to prevent the stronger-variant infection. While the restaurants have been currently allowed to provide only takeaway service, the recovery period of carbonates especially in a glass bottle that mainly sold through foodservice channel is expected to prolong until the lockdown ends.

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Functional benefits increasingly present in carbonates

* With carbonates set to face more challenges as its perception of high-sugar level as well as consumers’ growing health consciousness, manufacturers started to seek for new avenues of growth to sustain carbonates’ performance. The product development will be highlighted more on functional benefits added such as vitamin C and B to reform consumers’ perception. Boon Rawd Brewery Co Ltd, the major players in bottled water market, taps the carbonates market with a launch of Singha Lemon soda and Yusu Lemon Soda in late 2020. Such Singha beverages are claimed to contain zero sugar, zero calories and high vitamin C to grasp health-conscious consumers. Serm Suk PCL, Est brand owner, has reformulated its product with high vitamin B6 and B12 version in a “Grape Berry” and “Salty Lychee” flavour in February 2021. Meanwhile, Big that owned by Aje Thai Co Ltd is now developed two new flavours with high vitamin C content, the tamarind honey and lemonade soda. Such market movement from large company has confirmed the healthy trend in the carbonates industry.

<https://www.minimeinsights.com/2021/05/11/new-big-cola-tarmarind-and-lemonade-flavours-for-summer/>

<https://www.matichonweekly.com/publicize/article_403714>

### International players characterise zero-sugar carbonates

* Along the increasing popularity of sugar-free beverages among carbonates consumers and the ongoing excise tax on sugary drinks, the top players in a cola carbonates category have indicated their position by implemented an attractive advertisement, reformulated the cola product and repackaged its appearance. The international brands, Coca-Cola, which is the first leader in a cola market, has strengthen its top position with the zero-sugar version and zero-calories reformulation. Besides those claims, its packaging of zero-sugar product has been redesigned with a simplicity strategy. Pepsi, the main competitor of Coca-Cola, has launched the Pepsi Max Taste Strawberry with zero sugar and calories to hit the market.

<https://www.ryt9.com/en/prg/249433>

<https://mgronline.com/business/detail/9640000044703>

### Players emphasise key features such as novelty to attract young consumers

* The Non-Cola Carbonates category sees the highest development, apart from aforementioned vitamin ingredient, in term of product’s flavour variety. All players are effectively competing by developing their products in the different ways to grasp the same demand of young generation. Fanta is becoming the second brand developing the zero-sugar content in an orange and strawberry flavour in February 2021, after the launch of Est Play in 2020. The new root beer flavour is now introduced by Mirinda brand that targeting to fit the current lifestyle of young generation and generation Z. Among this competitive market, the small brands like Aje Big and Est are also making the impressive scene of the high vitamin drinks launched by both brands, furthermore, Est PLAY Jelly Shake carbonated drink manufactured by Est – consumers have to shake it before open to enjoy the drink in a jelly texture. Such developments are forecasted to be increasing to ensure the category’s performance.

<https://mgronline.com/business/detail/9640000016648>

<https://brandinside.asia/fanta-no-sugar-in-thailand/>

<https://www.matichonweekly.com/publicize/article_403714>

## Category Data

Dynamic tables

Country = TH

Project = SD2022

Code = 04

DocClassID = 2

Juice in Thailand

Euromonitor International

GetDate

# Juice in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

* Comment on the main story within the category in 2021
* State 2021 off-trade value growth and off-trade volume growth with data
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## 2021 Developments

Cover key trends below, making reference to any ongoing impact COVID-19 is having on the category and consumer spending/purchasing patterns in 2021 where relevant. Also consider covering competitive landscape (company strategy and interesting new product development) and changing distribution trends, alongside any other major developments.

### Home-made juice takes shares from juice products

* With soaring worldwide unemployment rate that are only forecasted to increase along the ongoing pandemic, both unemployed groups, reduced working hours workers and work-from-home officers have been forced to spend longer time at home and create their own home-based jobs for their life during the lockdown. The handcrafted juice and cold-pressed juice are being outstanding among small producers to sell it through online channels with growing demands from consumers those who spend more time on the platform. The packaged juice placed on shelves seem to get negatively impacted from such demand shift.

### Long term quarantine lowers the demand in fresh-chilled juice

* The 2021 recovery stage is projected regarding to the severe impacted of 2020 infection which negatively caused by the governmental measures, sluggish tourism, and depression of entire economy. The 100% juice from both Reconstituted and Not from Concentrate form that mostly developed in a fresh-chilled formula are getting strongly impacted from such occurrence as less people purchasing it for their long-term stockpile. In addition, the lower purchasing power among juice consumers has led a lower demand in such premium juice products. With the relief of many restrictions in 2021, such product is forecasted to recover faster than the shelf-stable version which driven by the existing demands.

### Healthy trend curves the juice innovation

* Juice beverage is literally perceived as a healthy choice that extracted from natural fruits but with its high-sugar level and the use of synthetic fruit flavours, consumers have been realizing that it is unhealthy. The juice companies are set to face with such significant challenge to recommunication their products benefit by labelling the functional benefits offered on the package.

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Average unit price increases from more presence of vitamin C drinks

* The juice drink brands which introduced a 200% vitamin C content (of the recommended daily intake) has continued its novel experience with growing demand through off-trade channels as more brands are presented in the market to ensure the effective competition. This sub-category of vitamin C drink is dominated by the domestic brands with C-vitt brand being the first leaders, then followed by Double C and Vitaday consecutively that lately launched in 2018. The major companies from several beverage market has also tapped the market such as Hi! from T.C. Pharmaceutical Industries Co Ltd, Scotch ABC Drink from Scotch Industrial (Thailand) Co Ltd, QminC from TERA Food and Beverage Co Ltd, Camu C from RS Group and Vita One C+ from MN Beverage Co Ltd, which lately introduced in 2020-2021. With an increasing popularity among young consumers who like to experience the novelty and health-conscious consumers, the juice drink with high vitamin content will be highly demanded along the forecast period. However, with the higher selling price of such vitamin C drink, the total unit price is set to be increasing along the forecast years.

### Coconut water shapes the growth of category

* Coconut and other plants water, that gains more demands from wellbeing consumers, is being more progressive in term of product innovation from its functional value of natural source claim. Besides those existing brands, the new entry of “RU Coco”, manufactured by C.P. food store Co Ltd which is a subsidiary of CP group, has been introduced in October 2020. The brand has continually innovated several developments such as 100% coconut water, high vitamin C and B version, and the latest launch of coconut drip coffee in May 2021. Cocomax, the first leader of this category, has expanded the coconut water line with high vitamin A formulation in October 2021. The manufacturers are set to overcome the significant challenges that more consumers tend to drink the fresh coconut water as it offers full nutrition and its natural benefits.

<https://www.ryt9.com/s/prg/3226332>

<https://www.facebook.com/CocomaxThailand/posts/3195134987250487/>

### Juice drink offers the greater thing than its economy price

* Apart from those vitamin drink products, the regular economy products in juice drinks category slowed in 2021 as multiple brands suffered with consumers’ growing health consciousness. The upto 24% juice drink is deemed as a sweetened drink with higher sugar content which leads health-conscious consumers lowering their consumption. However, FoodStar Inc, who is the first leader in such category, has reformulating its brand of Deedo Max C with 200% vitamin C claim (of the recommended daily intake) to be in line with functional drink trend. The market was more fragmented while other economy players also come joining such functional juice market, for instant, the Kato brand launched peach lemon flavour with high vitamin C value.

<https://www.facebook.com/1681314325507621/posts/2566249673680744/>

<https://www.mitihoon.com/2021/06/01/240740/>

## Category Data

Dynamic tables

Country = TH

Project = SD2022

Code = 01

DocClassID = 2

Bottled Water in Thailand

Euromonitor International

GetDate

# Bottled Water in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

* Comment on the main story within the category in 2021
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## 2021 Developments

Cover key trends below, making reference to any ongoing impact COVID-19 is having on the category and consumer spending/purchasing patterns in 2021 where relevant. Also consider covering competitive landscape (company strategy and interesting new product development) and changing distribution trends, alongside any other major developments.

### Drinking water consumption shifts towards bulk packages

* Though the governmental restrictions to prevent the covid-19 infection, like national lockdown, public areas closures, work-from-home measure, timing curfew, and others, have been ended in some provinces but most people seem to be adapting to life under the lockdown. This causes a shift in bottled water consumption from drinking a single bottle to a bulk package. Furthermore, the drinking water in a bulk version has been set to deliver at home which suits consumers’ lifestyle during covid-19 outbreak.

### Functional water leads the growth in bottled water fuelled by young consumers

* The covid-19 infection is bringing up the health concerns among consumers to not consume sweetened and high-calories beverages which are the main cause of obesity. Such behaviour change in consumers is reflecting across non-alcoholic beverages industry including bottled water as consumers are requiring more functional values added in the clear drinking water. The functional bottled water category has been becoming a flagship product along the wellbeing trend of nowadays consumers. Some consumer groups from other beverages such as juice, carbonates and energy drinks are tending to switch and try this novelty.

### Closures in entertaining venues depress the Carbonated Purified Bottled Water

* During such health crisis, alcoholic drink that majorly perceived as a drink for entertaining and enjoying life among consumers has been less consumed through both on-trade and off-trade channels. The Carbonated Purified Bottled Water as a mixer for alcohols has been dropped dramatically from the national countermeasures including restaurants closures to prevent the virus infection. Furthermore, foodservice segment is partly influenced by tourism segment that also suffered from a ban of the international flight and curfew policy. In the year of 2021, the total market was predicted to be partially recovered but the third wave of infection has been slowed down the entire economy and caused all counter measures to be reinforced again.

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### More brands tap onto the functional market to join the health-conscious demand

* It seems like the covid-19 infection has accelerated manufactures to step out of their comfort zone to the functional benefits offered in bottled water. The functional bottled water becomes a great opportunity player as there are more brands introducing their products with variant nutrition that greater than drinking the pure water. There are almost ten brands presented in the market in over these consecutive years such as Vitaday, Ichitan Purra, Aquavits and D.r. Drink were introduced along the year 2020 while Vitmores+, Mansome vitamin water and B’lue C200% were lately launched in 2021. In the same time, Yanhee which is the longest lasting brand in vitamin water has developed the new two flavours, lychee and strawberry, to satisfy existing consumers who always prefer a new experience. Functional benefits of vitamin C and B has been labelled as a highlight theme to capture more healthy demands.

### Small players in mineral water see highest innovative

* As the Still Natural Mineral Bottled Water category has been long perceived as a premium product from its high-price set, the major consumer base is from mid-high income group, foreigner tourists and health-conscious consumers while another significant portion has been contributed by high-end restaurants. Such premium bottled water has been decreasingly demanded due to several factors such as depressive economy and tourism segment, limited channels availability during the lockdown, lower purchasing power among existing consumers and more alternatives choice in health consciousness theme. The producers in such category have to be adaptive with the sophisticated needs of consumers by expanding their product lines, along with shifting their focus to another opportunity. For example, Purra brand has been launching the new vitamin C and B water while the Mont Fleur and Evian brand pays more attention on its mineral water facial spray product.

### Singha and Crystal remain the clear leader in 2021

* Domestic manufacturers dominated bottled water market, with leading players, Serm Suk Plc and Boon Rawd Brewery Co Ltd that remains the top 2 leader for several years. While their domestic presence helped to strengthen the local consumers awareness, both players also invested aggressively in new packaging design over the review period to align with consumers needs in such lockdown period. The Boon Rawd Brewery Co Ltd’s brand, Singha, has redesigned its 6 L pack size in a Lego idea as well as the free dispenser promotion for three bottles purchased. Crytral brand, owned by Sermsuk Plc, is becoming a first mover of drinking water in a metal can.

<https://mgronline.com/business/detail/9640000072226>

<https://www.eventpass.co/event/%E0%B8%99%E0%B9%89%E0%B8%B3%E0%B8%94%E0%B8%B7%E0%B9%88%E0%B8%A1%E0%B8%AA%E0%B8%B4%E0%B8%87%E0%B8%AB%E0%B9%8C6%E0%B8%A5%E0%B8%B4%E0%B8%95%E0%B8%A3%E0%B8%94%E0%B8%B5%E0%B9%84%E0%B8%8B%E0%B8%99%E0%B9%8C%E0%B9%83%E0%B8%AB%E0%B8%A1%E0%B9%88!%E0%B8%95%E0%B9%88%E0%B8%AD%E0%B9%84%E0%B8%94%E0%B9%89%E0%B9%80%E0%B8%AB%E0%B8%A1%E0%B8%B7%E0%B8%AD%E0%B8%99LEGO/1ErK6B>

## Category Data

Dynamic tables

Country = TH

Project = SD2022

Code = 08

DocClassID = 2

Sports Drinks in Thailand

Euromonitor International

GetDate

# Sports Drinks in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

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## 2021 Developments

Cover key trends below, making reference to any ongoing impact COVID-19 is having on the category and consumer spending/purchasing patterns in 2021 where relevant. Also consider covering competitive landscape (company strategy and interesting new product development) and changing distribution trends, alongside any other major developments.

### The covid-19 measures continue to weaken sport drink consumption

* The ongoing infection seems to be prolonged with the second and third covid-19’s waves that kills over hundred people and more than 10-thousand infected cases a day. Gym and fitness places have been controlled under the closure policy, together with current people whose who are willing to stay away crowded in order to prevent the severe infection. As such, all sport boosters including beverages are less consumed accordingly.

### Other alternatives in energy booster harm the market

* With its maturity stage of the sport drinks market that has been existing with Thai people for several decades, consumers seem to prefer a further step of product innovation that provides greater ingredients or functional nutrition for a better outcome. Consumers tend to shift towards other alternative choices such as energy bars and whey protein that provides a greater power output.

### Sluggish economy in blue collars depress the category

* Due to the fact that the core consumers for sport drinks are blue-collar workers such as farmers, drivers and labours who need such beverages to boost their energy. But during the infection, these consumer groups seem to get severely impacted from the pandemic which weakening their power of purchasing such unnecessary products. Most of labours who working at the construction site are even getting stronger impacted in 2021 as the infection has been more infecting around their places which caused a special countermeasure from government to close all sites in a whole month of July 2021.

<https://www.prachachat.net/property/news-700916>

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Sponsor shows the big movement to overcome all challenges

* The only-industry dominant of Sponsor seems to confront the significant obstacle from several negative factors like market maturity, other drink alternatives and the governmental restrictions in 2021. Despite such difficulties, its producer, TC Pharmaceutical Industry Co Ltd has put their effort to develop the product by repackaging it in a PET bottle which changed from the traditional glass bottle. Such PET package innovation is to target more young-adult consumers and capture on-the-go lifestyle among nowadays consumers.

<https://www.bangkokbiznews.com/news/detail/942504>

### Key development remains poor in term to boost power

* As today consumers are more educated about the better ways to work out, thanks to wider internet access, most of them are now perceiving that protein is the best source of energy. Both natural source of protein like soy milk and artificial stuffs like whey drinks become more popular among young-adult consumers. Together with, there are more brands available in variety form such as DNA Black high-protein soymilk, Tofusan high-protein soymilk, Dutch Mill High Protein Whey Plus and Meiji high protein through all retail channels including the nationwide convenience stores where can be found easily. The consumer awareness on sport drink has been lower in term of helping to boost power.

<https://www.fitnessth.com/%E0%B8%9C%E0%B8%A5%E0%B8%B4%E0%B8%95%E0%B8%A0%E0%B8%B1%E0%B8%93%E0%B8%91%E0%B9%8C%E0%B8%99%E0%B8%A1%E0%B9%83%E0%B8%997-11%E0%B8%97%E0%B8%B5%E0%B9%88%E0%B9%83%E0%B8%AB%E0%B9%89%E0%B9%82%E0%B8%9B/>

<https://www.google.com/search?q=tofusan+high+protein&rlz=1C5CHFA_enTH903TH903&sxsrf=ALeKk00pmZmOIy3ar-qnuTw7FsF3v0oyyA:1627496988320&tbm=isch&source=iu&ictx=1&fir=n_0DyUNcR2aZDM%252CBr-rIhEVfzjCsM%252C_&vet=1&usg=AI4_-kRrVqfi_07d6OdRuXdg4J4y1u2wIg&sa=X&sqi=2&ved=2ahUKEwiugPLesobyAhXEGKYKHfXzBRQQ9QF6BAgVEAE&biw=1440&bih=743#imgrc=n_0DyUNcR2aZDM>

<https://promotions.co.th/reviews/sports-outdoors/7-11-meals-after-workout.html>

### Players face difficulty from lacking marketing activities

* The most effective marketing campaign for many sport drink brands is to sponsor the sport event such as running contest, running event, and national football fight. Due to the covid-19 infection in 2020 that continues to 2021, all public events have been cancelled or postponed, avoiding people gathering. This seems to be indirectly impacted to several brands like Sponsor, M-sport, and 100 plus to drive their business and consumers awareness.

## Category Data

Dynamic tables

Country = TH

Project = SD2022

Code = 07

DocClassID = 2

Energy Drinks in Thailand

Euromonitor International

GetDate

# Energy Drinks in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

* Comment on the main story within the category in 2021
* State 2021 off-trade value growth and off-trade volume growth with data
* Comment on 2021 on-trade volume growth versus off-trade volume growth if applicable with data
* Comment on the competitive environment in 2021 with off-trade value data
* Comment on forecast period CAGR off-trade value and off-trade volume growth with 2026 data

## 2021 Developments

Cover key trends below, making reference to any ongoing impact COVID-19 is having on the category and consumer spending/purchasing patterns in 2021 where relevant. Also consider covering competitive landscape (company strategy and interesting new product development) and changing distribution trends, alongside any other major developments.

### Consumers shift toward herbal energy drinks

* Consumers’ health consciousness will become the critical contributor to the energy drink market, while most of the products in this category are deemed to be only caffeine-power booster. More consumers are switching to try the novelty of herbal energy drink, along with more brands introduced in several herbal formulations such as Som Plus Super, launched by TC Pharmaceutical Industry Co Ltd in May 2021, that extracted from black galingale, lingzhi, and vitamin. As such, the demand for traditional formulation of energy drink is projected to decline according to such consumers shift.

<https://www.bangkokbiznews.com/news/detail/938578>

### The delay in market recovery is caused by 3rd infection round

* The entire economy recovery in Thailand see further delay as the country faces the third wave of covid-19 infection, that could also dent the weakened consumers and several industries confident. Blue-collars consumers and labours intensive who deemed to be a major target of energy drink industry has lost their jobs while some were reduced their working hours. In addition, all construction sites have been closed due to the severe infection that occurs in July 2021. The consumption of energy drink has been slowed down consecutively with a longer-pace recovery expected.

### The third taxation lift creates opportunity to develop

* The third phase of the excise tax on sugary drinks that plans into force on 1 October 2021 is currently postponed for a year to help the manufacturers during this difficult time. This 3rd phase of sugar tax has been set for the 10-14 grams of sugar content beverages to be taxed 3 times more which causes a 10-percent selling price increased. Thus, such taxation scheme will push a further innovation as well as an increase in selling price for energy drink in 2022 and along the forecast period.

<https://www.prachachat.net/finance/news-677004>

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Osotspa targets millennials with launch of M-150 ZA

* Osotspa Co Ltd witnessed a significant increase in off-trade value size with the nearly 50-percent share, strengthening its leadership in energy drink. The player’s M-150 brand continued to garner consumers’ interests given its wide distribution network and comprehensive portfolio of flavours as well as the continuity of product innovation. To strengthen its first leader position, the company is recently launching the carbonated M-150 ZA in a metal can package with functional values offering such as vitamin C, B and zinc. The product is widely placed on shelves through nationwide convenience stores of 7-eleven to target younger consumers and step beyond blue collars group.

<https://siamrath.co.th/n/230412>

### More companies aim to strengthen their products’ presence abroad

* The mature energy-drink industry in Thailand has led the companies seek a further opportunity and focus more on overseas market especially the CLMV market as it offers a room to expand its consumer base and product’s novelty. TAC consumer Plc has launched the Jump Start with ginseng extract, multi-vitamin and L-theanine to tap the Cambodian market as well as the Super Fight brand that manufactured by Sherwood Corporation (Thailand) Plc to hit the CLMV market in 2021. Meanwhile, the Carabao Tawandang Co Ltd has increased the revenue shares in oversea market to more than half of total revenue.

<https://brandinside.asia/commando-energy-drink/>

<https://www.tacconsumer.com/cn/news_details.php?i=138>

<https://www.prachachat.net/marketing/news-635722>

<https://www.prachachat.net/marketing/news-561266>

### Energy drink players step out to try new market

* As the change of consumers’ behaviour of being more health-conscious has suffered the energy drink players due to the high-sugar level and caffeinated drink perception, the demand for such beverages has been declining continually. Many companies seem to switch their core business to other drink products that provides a room to remain their revenue like functional bottled water and high-vitamin juice drink. Osotspa Co Ltd is consecutively growing their C-vitt performance by more effective marketing campaigns and wider product line. Carabao Group Plc has set up the new subsidiary, A Woody Drink Co Ltd, and broken out Woody C+ Lock brand vitamin shot in the portfolio. Along with TC Pharmaceutical Industry Co Ltd, Hi! was lately launched to enjoy the functional juice drink market shares. Furthermore, the Mansome in functional bottled water is now innovated with a greater appearance and better functional benefits. The aforementioned points has witnessed a significant difficulty among companies to overcome in the energy drink industry.

## Category Data

Dynamic tables

Country = TH

Project = SD2022

Code = 03

Declassed = 2

Concentrates in Thailand

Euromonitor International

GetDate

# Concentrates in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

* Comment on the main story within the category in 2021
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## 2021 Developments

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### Increasing healthy demand depresses the market

* Due to the fact that, people who have obesity are increasing the risk of severe illness from Covid-19. Most consumers are likely to concern more about their health and have more valuable foods and drinks. In addition, the concentrates product is deemed to contain high level in sugar content which causes obesity, diabetes, and other conditions linked to heart disease, and this links to unhealthy cholesterol and triglyceride levels. Consumers tend to avoid such unhealthy drinks during the pandemic and prolong to the forecast period.

### Sugar tax impacts on unit price and product innovation

* The new excise tax that applied for all sugary beverages including concentrates has been proceeded to the 3rd phase of collection which supposed to be effect in October 2021. But with the pandemic has taken a toll on many industries, such taxation is now postponed to next year for giving more time to companies in order to reorganize their business strategy. As such, a change in selling price and new product development is expected to see by the upcoming collection of sugary taxation in 2022 or the near future.

<https://www.thebangkokinsight.com/news/business/economics/632508/>

### Covid-19 hits liquid concentrates harder than powder version

* During the suffering 2020 pandemic, all restaurants and café were forced to closed for months while some cities continue a periodical closure to 2021. Some concentrate consumers were shifting from foodservice channels to retail with higher demand on powder version due to its longer shelf-life, easy mobility and easy storage. Such behavior’s change seems to resituate as consumers are still aware of getting infected from the stronger Delta variant during the 3rd infection round.

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Powder version leads category

* The powder concentrate remains being dominated by the international players like Nestle (Thai) Ltd and Unilever Thai Holdings Ltd with the top-of-mind brand awareness among consumers. Both major players keep developing their produce to grasp the existing demand in different strategies. Nestea which is the first leader brand innovated the product in a single serve pouch bag with high-vitamin C labelled to attract the health-conscious consumers, while the Lipton, its main competitor, developed the product’s package into the plastic jar to ease consumers life when they keep it and reformulating the unsweethened version to respond the new taxation as well as current healthy trend. However, the both players seem to pay more attention on their RTD tea product as there are more NPDs launched during consecutive years.

<https://www.shopat24.com/p/%E0%B8%A5%E0%B8%B4%E0%B8%9B%E0%B8%95%E0%B8%B1%E0%B8%99-%E0%B8%8A%E0%B8%B2%E0%B8%9C%E0%B8%87-85-%E0%B8%81%E0%B8%A3%E0%B8%B1%E0%B8%A1/478389/?gclid=CjwKCAjwo4mIBhBsEiwAKgzXOGy1dmsbnKaIKeCWxJ5oPmV1_nFG-8WCyeIN4s9UMSjBopJFvw89axoClTUQAvD_BwE>

### Doi Kham builds consumers loyalty with new programs in foodservices

* As the demand for liquid concentrates trends to decline in both on-trade and off-trade channels, caused by the sluggish economy and covid-19 countermeasures, the players in such category are confronting with the big challenges to overcome the market. The product development strategy is not only the solutions to help companies drive their business, but the marketing activities and promotional campaigns are becoming the major point to run their growth. Doi Kham sees a big move to build the market in foodservice channels by cooperating with several famous restaurants to create the special menus with Doi Kham products, for example, the Kham Passion Fruit Squash and Sweet Sunset that using Doi Kham passionfruit concentrates from Farm Factory restaurant.

<https://www.bangkokbiznews.com/news/detail/928418>

### Hale’s Blue Boy remains leadership but less active

* Though Hale’s Blue Boy has secured its leadership position in liquid concentrate market, thanks to plentiful awareness among remaining consumers who raise Hale’s Bule Boy as a top of mind brand. However, with the uncertain demand of persuadable consumers, the activeness is required in order to keep its leadership. Moreover, the 2nd phase of sugar tax has caused an increase in selling price of Hale’s Blue Boy that may impact consumers’ decision to choose other economy brands.

<https://pantip.com/topic/39161463>

## Category Data

### Concentrates Conversions

* Tell us which major brands are impacting the overall conversion ratios for liquid and powder concentrates.

Fill in the table below. If you have a breakout for powder concentrates, please also add it here. For example, Powder sports concentrates OR Powder instant tea concentrates.

##### Summary Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

|  |  |
| --- | --- |
|  | Conversion factors |
| Powder concentrates | 1kg = |
| Liquid concentrates | 1 litre = |

Source: Euromonitor International

Dynamic tables

Country = TH

Project = SD2022

Code = 06

DocClassID = 2

RTD Tea in Thailand

Euromonitor International

GetDate

# RTD Tea in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

* Comment on the main story within the category in 2021
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## 2021 Developments

Cover key trends below, making reference to any ongoing impact COVID-19 is having on the category and consumer spending/purchasing patterns in 2021 where relevant. Also consider covering competitive landscape (company strategy and interesting new product development) and changing distribution trends, alongside any other major developments.

### Maturity sets a slow decrease in demand

* The RTD Tea demand has been set to drop in the recent years which caused by several factors like the high-level of sugar content, the consumers’ perception of unnecessary drink during this sluggish economy, together with the covid-19 factors that impacts people’s life to slower their purchasing the ready-to-drink product. On the other hand, RTD tea market seems to be recovered from the significant drop due to the pandemic as the lockdown ended in some areas and consumers have more chances to spend time outside. However, its recovery is forecasted to need a longer period than the previous projection in both foodservice and retail channels.

### New launched likely to focus on health

* The third phase of sugar tax increase is going to postpone its effect from October 2021 to October 2022 that encourages both consumers and manufacturers to be aware the severe health effect from high-sugar consumption. Though the government has offered a further year to cope with another taxation, but RTD Tea companies seem to get ready by reformulating and launching the products under better-for-you and naturally-healthy category.

### Functional values offers opportunity in market growth

* The regular RTD tea has been long perceived as a sweetened drink that can harm people’s health in longterm basis while some consumers think that it is unnecessary product to consume in this depressive economy. To remove such perception, RTD Tea players need to present their products in health and wellness theme. More products are launched to represent its beneficial values such as the vitamin B from Oishi Genmaicha, L-theanine from Ichitan Green Lab and zinc from Nestea.

<https://www.thairath.co.th/business/market/2065677>

Oishi Gold Maigen Cha – vitamin B

<https://thestandard.co/ichitan-green-lab/>

Green Lab Ichitan

<https://mgronline.com/business/detail/9640000019871>

Chaguza Grape flavour- Oishi

<https://www.facebook.com/OishiDrinkStation/?ref=page_internal>

[OishiGoldWakoucha](https://www.facebook.com/hashtag/oishigoldwakoucha?__eep__=6&__cft__%5b0%5d=AZXJiztrrkiC0os_nLS5uHX0N3iWCxtAEFqlJf0hLjy3Mzr-In04iIjKfh_cmPCOgqqLtyPQCKD8xEQJ8bEijOrrfiqnVelejxspVHJwtKzENO7dlnOSnNppwrUcOdD1F6oSglGwGSMnWSKohbCmRogH&__tn__=*NK-R)

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Competition in RTD tea set to intensify from the presence on new entry

* Lipton, the only lemon iced tea brand in still RTD tea category, seems to face a huge challenge from the first launch of its main competitor like Nestea Lime Iced Tea in a PET bottle in April 2021. This has widely impacted to consumers’ decision as both brands are in the strong position of power iced-tea concentrates product. Meanwhile, Lipton is trying to strengthen its leadership by launching 2 New Flavors of Lipton Herbal Blends with 40% Lower Sugar, Free of caffeine to enhance its presence in healthy drink position, along with the zero-sugar version of original product.

<https://salehere.co.th/nestea/promotions/beverage-lemon-tea-april-2021>

Nestea lime tea

<https://www.facebook.com/LiptonThailand/>

ลิปตัน ไอซ์ที เลมอน ซีโร่ ชูการ์

<https://food.trueid.net/detail/bdvVqg2MW3od>

Lipton Herbal Blends

### Ichitan benefits from legalised cannabis and hemp fever

* The cannabis legalization in Thailand has become a viral topic among the public over the past few years, as some people pointed out the reason of cannabis extract has medical benefits while some indicated that it may create a number of crime and violence from its production and distribution process. It is eventually ended up with the official legalization of cannabis for medical use. Many companies from several industries see this opportunity to use the cannabis extract with their products when it comes to RTD tea industry. Ichitan Group Plc is being the first mover who utilizing the cannabis and hemp viral to market their new product without using the cannabis extract, names Green Lab. The Green Lab greantea with a terpene infused water was introduced in April 2021 to build a consumer awareness and foresee the demand. Moreover, the company also established the ‘Ichitan Green Lab The Cannabis Club’ café where serves over 30 menus of cannabis foods and drinks.

<https://www.lexology.com/library/detail.aspx?g=c9dae25b-7e16-44c3-8c8e-6b30e9145fb6>

<https://thestandard.co/ichitan-green-lab/>

### Oishi strengthen its lead with new brands launched

* Oishi accounted for stronger presence in still RTD Tea and carbonates RTD Tea with Oishi Green Tea taking up the first position for several years. Consumers’ familiarity with the Oishi brand was the key contributor to this, as consumers had strong trusts in the product quality and original taste offered. Moreover, the brand consistently launches new product variants which helps to refresh their image among consumers. During the first half of 2021, the company were introducing several RTD tea product to strengthen its position like Chaguza Grape flavour in March, the Oishi Genmaicha with high vitamin B claim in both delight and no-sugar version in April and the premium Oishi Gold Wakoucha that produced from a premium Japanese tea in June.

<https://mgronline.com/business/detail/9640000019871>

Chaguza Grape flavour- Oishi – mar 2021

<https://www.thairath.co.th/business/market/2065677>

Oishi Gold Maigen Cha – vitamin B – Apr 2021

<https://food.trueid.net/detail/Ww3yz2Xllnzg>

Oishi Gold Wakoucha – Jun 2021

## Category Data

Dynamic tables

Country = TH

Project = SD2022

Code = 05

DocClassID = 2

RTD Coffee in Thailand

Euromonitor International

GetDate

# RTD Coffee in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

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## 2021 Developments

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### In-home coffee consumption takes share from RTD coffee

* Since the third wave of coronavirus in Thailand characterised by fierce new variants is covered all provinces in Thailand, most of people particularly in rural areas have been struggling to keep their head above water. The labour’s camps where were one of the major epicentre of the infection was under the closure measure while foodservices are dealed to close the dine-in service once again. People are more aware to stay away their home due to both factors of infection fearness and sluggish personal economy that led more in-home coffee consumption. The RTD coffee which has huge consumers base in rural range consumers seem to gain decreasing popularity until the economy recovered.

### Sugar tax leads a focus on black coffee

* The new excise tax on sugary beverages that comes in forces in October 2021 for the third round is now lifting to the next year in order to spare a further year for companies. The unsweetened coffee as well as reduced sugar version has been increasingly presented in the market to target beyond the traditional consumer base of rural and blue-collars. Black coffee or Americano will be the major theme for such coffee development in 2021.

### Fresh coffee players tap onto RTD version

* The premiumization trend that projected to be discontinued in several drink industries caused by the pandemic, but exception will be in premium coffee. As most young consumers who are troubled from café closures during the lockdown has seeked the alternative coffee choices and premium RTD coffee becomes a precise answer. The presence of more brands in RTD coffee from fresh coffee blend is obviously attractive coffee lovers such as True Coffee, that originally run the coffee business, has introduced their latte and americano coffee in an RTD cup, the Tokyo Brew Latte also developed the cold brew coffee in an RTD version as well as the UCC brand from fresh coffee bean category that was innovating the UCC Tokyo Cuppa Black in the PET bottle. Aforementioned examples are widely sold through the nationwide convenience store of 7-eleven and other top supermarket brands.

<https://food.trueid.net/detail/gqwajVdmVlxP>

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Birdy targets healthy demand with new black coffee

* Ajinomoto (Thailand) Co Ltd witnessed the over 50-percent market share, strengthening its leadership in RTD coffee. The player’s Birdy brand continued to garner consumers’ interests given its wide distribution network and comprehensive portfolio of flavours that answered varying needs of consumers. With the fierce competition in premium RTD coffee, the company also launched the Birdy Black Zero in April 2021 to respond both new taxation and premiumization trend in one shot. As well as, the new ambassadors were aggressively launched to refresh their brand image by introducing two young celebrities of Kem Hussawee and Mookda Narinrak. Such movement is expected to help Birdy expanding their consumers base further to young generation.

https://marketeeronline.co/archives/214739

<https://www.thairath.co.th/business/economics/2062172>

### Nescafe scale up in premium RTD coffee with PET package

* Despite the slowdown pace of regular RTD coffee market, Nescafe sees the most innovative in term of both new product development and repackaging strategy. Firstly, their product innovation has been raised to hit the premium demand with the Nescafe Barista Style americano coffee in a PET bottle in February 2021 as well as sustained the existing consumers with the Nescafe Triple Expresso in a traditional metal can in April 2021. Moreover, the lockdown and work-from-home policy has encouraged the company to enlarge their package in a 950-ml PET bottle to match with the lifestyle of current consumers. Lastly, its repackaging strategy has come up with the recycling scheme by changing to metal to aluminium to present the eco-friendly perspective.

<https://mgronline.com/business/detail/9630000120958>

<https://www.nestle.co.uk/en-gb/media/pressreleases/allpressreleases/nescafe-brings-new-innovative-barista-style-coffees>

<https://www.facebook.com/bkreview/posts/3557401031043606/>

### Exotic taste from local players targets young consumers

* The exotic flavour is likely to be a novelty among young consumers to experience and RTD coffee becomes another product that consumers are expected to see how the exotic flavour can apply to. Many players in the category have coped with such curiosity by the launch of coffee mixed with several drinks such as the coffee mixed with coconut water from RU Coco, and the cold brew coffee with yuzu from several home-made players.

<https://shopee.co.th/Cold-Brew-Coffee-Yuzu-%E0%B9%84%E0%B8%A1%E0%B9%88%E0%B8%A1%E0%B8%B5%E0%B8%99%E0%B9%89%E0%B8%B3%E0%B8%95%E0%B8%B2%E0%B8%A5-%E0%B8%81%E0%B8%B2%E0%B9%81%E0%B8%9F%E0%B8%AA%E0%B8%81%E0%B8%B1%E0%B8%94%E0%B9%80%E0%B8%A2%E0%B9%87%E0%B8%99%E0%B8%9C%E0%B8%AA%E0%B8%A1%E0%B8%AA%E0%B9%89%E0%B8%A1%E0%B8%A2%E0%B8%B9%E0%B8%8B%E0%B8%B8-i.16831457.7683879115>

<https://food.trueid.net/detail/gqwajVdmVlxP>

## Category Data

Dynamic tables

Country = TH

Project = SD2022

Code = 08

DocClassID = 2

Asian Speciality Drinks in Thailand

Euromonitor International

GetDate

# Asian Speciality Drinks in Thailand

## [Q: to be completed by in-house analysts and the CAT only. ICAS can leave the key data findings blank]

## key data findings

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### Trend one

Notes here.

### Trend two

Notes here.

### Trend three

Notes here.

## Prospects and Opportunities

Discuss the main trends expected to be seen during the forecast period.

### Trend one

Notes here.

### Trend two

Notes here.

### Trend three

Notes here.

## Category Data

Dynamic tables