

**MINTEL**

# **Non-Alcoholic Beverage Trends in Thailand**

How Brands Can Leverage Occasion-Based  
Strategies to Win Over Thai Consumers

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Experts in what consumers want and why

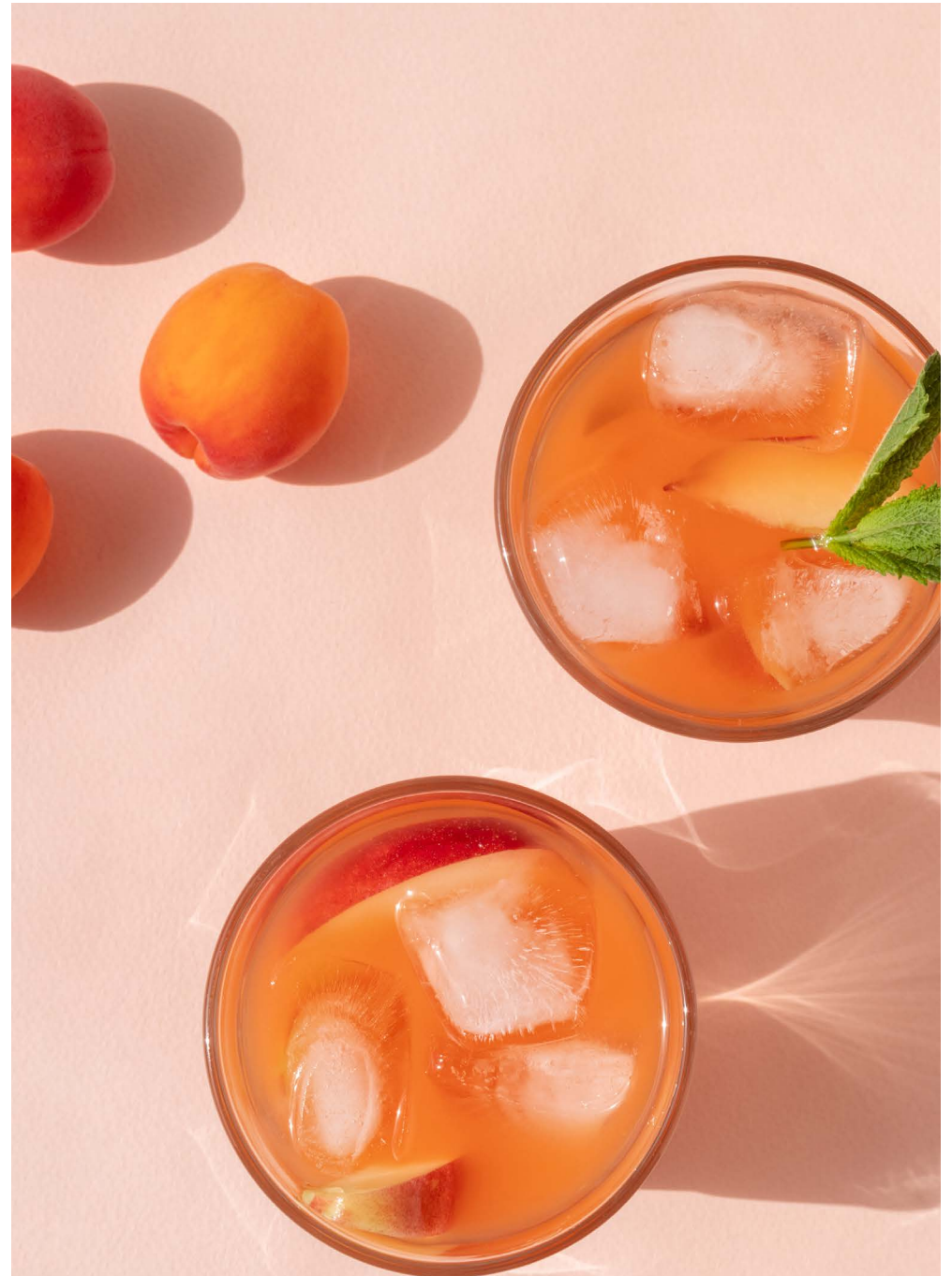


# Market Overview

The non-alcoholic beverage market in Thailand is undergoing a significant transformation, driven by evolving consumer preferences and emerging trends.

Nutritional value equals flavour in the choice of non-alcoholic drinks. Thais prioritise 'high nutritional value' and 'functional benefits' over 'low sugar' or 'no additives'. As consumers are shifting to healthier options, opportunities are being created for functional nutrition in non-alcoholic beverages. Urbanites are a key target for beverages with new positioning. Brands can drive engagement by aligning products with emerging trends.

This report delves into the key trends shaping the market, offering actionable insights for brands to enhance their competitiveness and tap into new opportunities.





# Key Trends

## The Pursuit of Healthy Living and Healthy Ageing

Social media engagement regarding 'healthy drinks' is becoming prominent this year, especially the topic of 'natural' formulations. Plant-based and reduced-sodium claims are surging in beverage launches in Thailand in the pursuit of naturalness. Thais are embracing ageing with holistic wellness goals on the rise.

## Rise in Adventurous Consumption Behaviour

In the pursuit of new experiences, consumers turn to unique food and drink flavours. Mintel's 2024 Global Food and Drinks include Inspired by Nature, Bold Experiences, Taste of the World and Extraordinary Classic. Moreover, global beverage brands are going outside-the-box to develop novel futuristic flavours using AI.

## Blazing Heat Spurs Cooling and Hydrating Needs

The United Nations announced the beginning of the 'global boiling era'. Thailand has been facing soaring heat with a surge in social media conversations regarding 'cooling drinks' and 'hydration.' Global beverage brands are taking natural hydration sources such as coconut to new drink territories. Fortifications target hydration.



# **In Focus: The Rise in Adventurous Consumption Behaviour**

# Consumer Desire for Novel Experiences

In the pursuit of new experiences and to quench their thirst for excitement, consumers turn to unique food and drink flavours. Thai consumers over-index compared to the majority of global consumers in their search for new flavours when consuming food and drinks.

This portrays the relatively adventurous mindset of Thai consumers and the importance that novel flavours hold if food and drink products are to thrive in the market. The need for novel indulgence will impact the non-alcoholic beverage industry, which will consequently drive brands to offer continuous flavour innovation.

**NEW FLAVOUR**

**36%**

of Thai consumers\* look for  
new foods/flavours to try  
most of the time

# AI-Driven Flavour Innovation

Artificial intelligence is playing an increasingly important role in flavour innovation, as brands seek to create unique and futuristic taste experiences. A notable example is Coca-Cola's limited-edition Y3000 flavour, which was co-created with AI to offer consumers a glimpse into what the future might taste like. The product also includes a QR code that allows consumers to engage with the brand through a custom AI camera filter, enhancing the overall experience. This highlights the potential for brands to harness AI capabilities alongside human creativity to develop novel flavours that resonate with consumers.



**3000 Zero Calorie Cola Soft Drink by  
Coca Cola Creations (Denmark)**

# **What Consumers Want and Why**

# Rise to the Occasions

Urban consumers in Thailand are more adventurous and open to experimenting with new non-alcoholic beverages for various occasions. This presents a significant opportunity for brands to create innovative drink options that cater to the exploratory nature of urban dwellers. By emphasizing novelty and versatility in their marketing strategies, brands can appeal to this consumer base and drive engagement. Additionally, understanding the occasions most commonly associated with each beverage type will be crucial for brands looking to **break beyond established occasions and develop new associations in the minds of Thai consumers.**

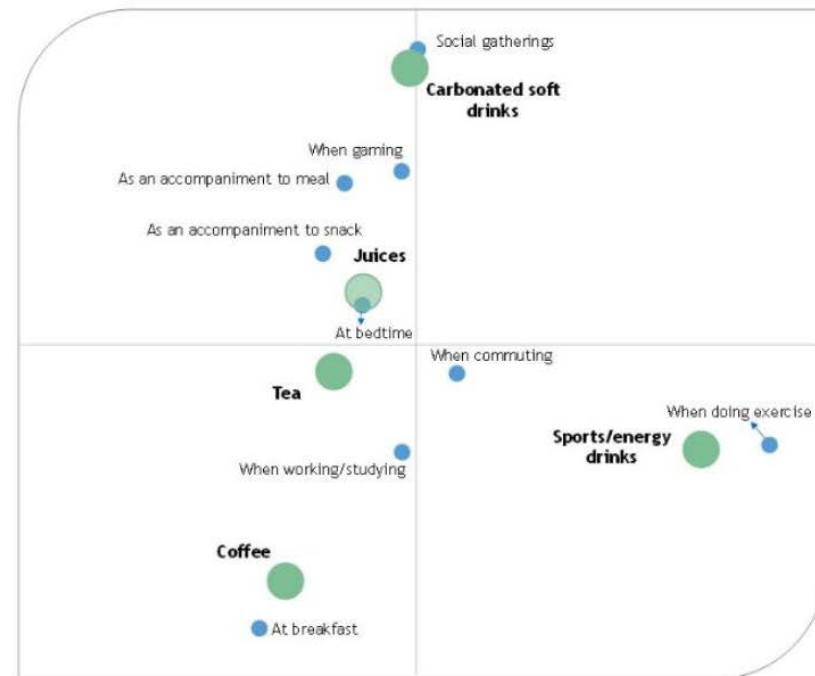




# Various beverage categories hold distinct positioning in the minds of Thai consumers

Beverage brands across categories can strengthen associations and create new consumption opportunities by positioning their products for emerging occasions, driving higher engagement.

Correspondence analysis – association between non-alcoholic beverages and occasions



Source: Mintel Thailand Reports

# Category Deep Dive

# Juices

Juices, particularly 100% fruit juice, are gaining traction in the Thai market, with strong associations to snack and meal occasions. However, there is significant potential for growth in other day-to-day occasions, such as bedtime.

Thailand: added benefits which would appeal to consumers when choosing a food and drink product, % of respondents, 2019-2023

● Pre-COVID-19 (July 2019) ● COVID-19 (December 2020) ● Post-COVID-19 (July 2023)



# Growing demand for sleep support among Thai consumers

The growing demand for sleep support among Thai consumers presents a key opportunity for juice brands to position their products for bedtime consumption. For example, Greenhouse's Lullaby+ Organic Booster, formulated with calming ingredients like passionflower and chamomile, is specifically designed for bedtime. By highlighting relaxation and sleep-supporting ingredients, juice brands can tap into this unclaimed market and strengthen their relevance in consumers' daily lives.



**Lullaby+ Organic Booster by  
Greenhouse (Canada)**

# Tea

Tea is a widely consumed beverage in Thailand, with 40% of Thais consuming it 2–6 times a week. However, the category lacks strong associations with specific occasions, which poses a risk to its future relevance. To secure its position, tea brands need to strategically create and promote specific consumption occasions.

One opportunity lies in positioning tea as an afternoon snack companion, leveraging the habit of afternoon tea-drinking and pairing it with salty snacks. Additionally, there is potential to position tea for bedtime consumption, particularly given the growing demand for sleep-supporting products. Educating consumers and fostering trust in tea formulations for sleep will be key to securing this positioning.



**'Like biting into a Jaffa Cake'**  
**Diplomat Biscuit Tea (UK) – Jaffa**



**'Malty taste of biscuits without a dunk'**  
**Diplomat Biscuit Tea – Biscuits**



# Carbonated Soft Drinks (CSD)

Carbonated soft drinks dominate social gathering occasions in Thailand, showcasing a strong social identity. However, beyond social gatherings, they lack strong associations with other occasions, such as gaming. With 36% of Thais playing games for 2-4 hours per day, there is significant potential for CSD brands to strengthen their presence in the gaming occasion. Targeting Gen Z men, who are most likely to associate CSDs with gaming, and incorporating brain-boosting ingredients like L-theanine can enhance mental focus and alertness, making CSDs a perfect companion for gamers.



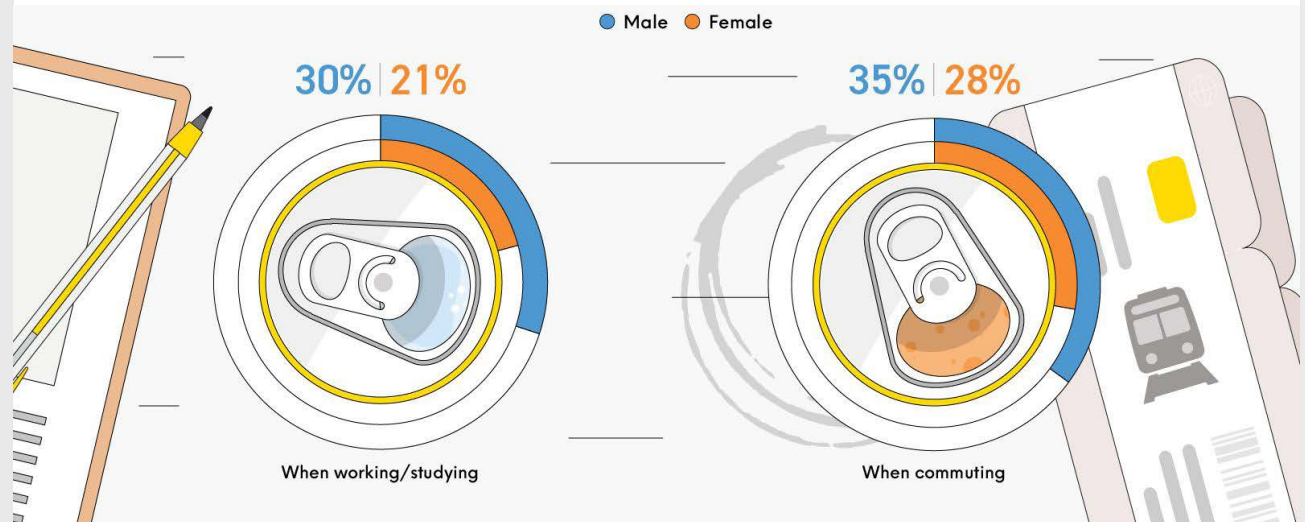
Coca-Cola and Riot Games for 'Ultimate' Flavour

# Sports and Energy Drinks

Sports and energy drinks are traditionally associated with physical activity, but they have yet to establish a strong presence in non-physical activities like work or study.

This presents an opportunity for brands to expand their appeal by targeting women with products that offer mental stimulation and holistic benefits. By highlighting benefits beyond physical performance, such as mental focus and energy for daily tasks, sports and energy drinks can appeal to a broader audience. Kimade Energy Drink, endorsed by Kim Kardashian, exemplifies this approach, offering a versatile product that empowers women to stay focused and energized throughout the day.

Thailand: association of sports/energy drinks with selected occasions, by gender, 2024



Source: Mintel Thailand Reports

# Key takeaways for brands

## New Occasion Positioning Will Drive Engagement

Urbanites in Thailand are open to trying new beverages at different occasions, presenting a broad opportunity for brands to drive engagement. By creating new occasion associations, such as bedtime positioning for juices and tea, brands can tap into unmet consumer needs and strengthen their relevance in the market.

## A Flavour Mix of Familiarity and Novelty Boosts Competitiveness

While favourite flavours remain top of mind for Thai consumers, there is also a strong appetite for novelty. Brands that strike a balance between familiar and innovative flavours will be well-positioned to remain competitive in the market.





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