



Euromonitor
International

Concentrates in Thailand

November 2025

Table of Contents

Concentrates in Thailand - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Limited growth amidst health trends and structural weakness

INDUSTRY PERFORMANCE

Structural weakness limits growth for concentrates in 2025

Health trend and competition challenge the growth of concentrates

WHAT'S NEXT?

Concentrates faces stagnation without strategic health-focused repositioning

Digitalisation to continue to optimise concentrates distribution in Thailand

Navigating the impact of the sugar tax and regulatory shifts

COMPETITIVE LANDSCAPE

Established players maintain their grip on concentrates

Nestlé's Nestea leads isolated growth in the stagnant concentrates category

CHANNELS

Small local grocers leads distribution, while bulk purchasing is significant

The growing role of retail e-commerce in B2B restocking

Concentrates conversions

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 3 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 5 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 6 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 7 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 8 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 9 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 10 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 11 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 12 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 15 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in Thailand - Industry Overview

EXECUTIVE SUMMARY

Value, wellness, and agile innovation drive growth in soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Soft drinks are redefining value amidst economic headwinds

Wellness and agility drive innovation in soft drinks

Innovation anchored in cultural relevance and emotional resonance

WHAT'S NEXT?

Health, lifestyle, and price expected to shape soft drinks in Thailand

Sugar tax and shifting lifestyles to drive continued reformulation and premiumisation

Soft drinks will increasingly embrace a diverse distribution landscape

COMPETITIVE LANDSCAPE

Coca-Cola maintains its lead in soft drinks with personalisation and hydration

Wellness helps CocoMax become a fast-growing force in soft drinks

CHANNELS

Enduring importance of traditional channels for impulse purchases

The strategic rise of e-commerce and the imperative for omnichannel adaptation

Retail and foodservice channels drive brand-building

MARKET DATA

Table 16 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 24 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 26 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 27 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 28 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 29 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 30 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 31 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 32 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 33 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 34 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 35 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 36 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 37 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 38 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 39 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Thailand

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 2 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/concentrates-in-thailand/report.