

# Snacks in Thailand

July 2025

**Table of Contents** 

# Snacks in Thailand

#### **EXECUTIVE SUMMARY**

Snacks in 2025: The big picture

Key trends in 2025

Competitive Landscape

Channel developments

What next for snacks?

#### MARKET DATA

- Table 1 Sales of Snacks by Category: Volume 2020-2025
- Table 2 Sales of Snacks by Category: Value 2020-2025
- Table 3 Sales of Snacks by Category: % Volume Growth 2020-2025
- Table 4 Sales of Snacks by Category: % Value Growth 2020-2025
- Table 5 NBO Company Shares of Snacks: % Value 2021-2025
- Table 6 LBN Brand Shares of Snacks: % Value 2022-2025
- Table 7 Penetration of Private Label by Category: % Value 2020-2025
- Table 8 Distribution of Snacks by Format: % Value 2020-2025
- Table 9 Forecast Sales of Snacks by Category: Volume 2025-2030
- Table 10 Forecast Sales of Snacks by Category: Value 2025-2030
- Table 11 Forecast Sales of Snacks by Category: % Volume Growth 2025-2030
- Table 12 Forecast Sales of Snacks by Category: % Value Growth 2025-2030

#### DISCLAIMER

#### **SOURCES**

Summary 1 - Research Sources

# Chocolate Confectionery in Thailand

## KEY DATA FINDINGS

# 2025 DEVELOPMENTS

Rising costs and product innovation informs demand for chocolate confectionery

Nestlé's increases its lead while Thai Lotte sees dynamic growth

Convenience stores lead sales while supermarkets focus on premium offerings

#### PROSPECTS AND OPPORTUNITIES

Rising cocoa prices set to inform innovation and affordability strategies

Brands likely to continue leveraging fan marketing to boost sales

Health and wellness trend boosting demand for healthier and dark chocolate options

# **CATEGORY DATA**

- Table 13 Sales of Chocolate Confectionery by Category: Volume 2020-2025
- Table 14 Sales of Chocolate Confectionery by Category: Value 2020-2025
- Table 15 Sales of Chocolate Confectionery by Category: % Volume Growth 2020-2025
- Table 16 Sales of Chocolate Confectionery by Category: % Value Growth 2020-2025
- Table 17 Sales of Chocolate Tablets by Type: % Value 2020-2025
- Table 18 NBO Company Shares of Chocolate Confectionery: % Value 2021-2025
- Table 19 LBN Brand Shares of Chocolate Confectionery: % Value 2022-2025
- Table 20 Distribution of Chocolate Confectionery by Format: % Value 2020-2025
- Table 21 Forecast Sales of Chocolate Confectionery by Category: Volume 2025-2030
- Table 22 Forecast Sales of Chocolate Confectionery by Category: Value 2025-2030
- Table 23 Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2025-2030

#### Gum in Thailand

#### **KEY DATA FINDINGS**

#### 2025 DEVELOPMENTS

Gum sales slump due to competition from other categories and product limitations

Mondelez leads thanks to Dentyne's success

Hypermarkets leads distribution while supermarkets show dynamic growth

## PROSPECTS AND OPPORTUNITIES

Gum poised for stagnation due to limited competition and innovation Fewer players and brand discontinuations as demand falls Focus on health and beauty shifts innovation towards functional benefits

#### **CATEGORY DATA**

Table 25 - Sales of Gum by Category: Volume 2020-2025

Table 26 - Sales of Gum by Category: Value 2020-2025

Table 27 - Sales of Gum by Category: % Volume Growth 2020-2025

Table 28 - Sales of Gum by Category: % Value Growth 2020-2025

Table 29 - Sales of Gum by Flavour: Rankings 2020-2025

Table 30 - NBO Company Shares of Gum: % Value 2021-2025

Table 31 - LBN Brand Shares of Gum: % Value 2022-2025

Table 32 - Distribution of Gum by Format: % Value 2020-2025

Table 33 - Forecast Sales of Gum by Category: Volume 2025-2030

Table 34 - Forecast Sales of Gum by Category: Value 2025-2030

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2025-2030

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2025-2030

# Sugar Confectionery in Thailand

# KEY DATA FINDINGS

# 2025 DEVELOPMENTS

Gummies and jellies driving growth with innovative flavours and formats

Mondelez retains the lead while Sunsu grows rapidly through fan Marketing

Small local grocers lead sales but supermarkets seeing rapid growth

#### PROSPECTS AND OPPORTUNITIES

Consumer health awareness should fuel demand for sugar-free innovations Brands to utilise celebrity endorsements to engage fans and boost sales Health and beauty trends set to drive innovation in sugar confectionery

#### **CATEGORY DATA**

Table 37 - Sales of Sugar Confectionery by Category: Volume 2020-2025

Table 38 - Sales of Sugar Confectionery by Category: Value 2020-2025

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2020-2025

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2020-2025

Table 41 - Sales of Chewy Candies by Type: % Value 2020-2025

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2021-2025

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2022-2025

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2020-2025

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2025-2030

- Table 46 Forecast Sales of Sugar Confectionery by Category: Value 2025-2030
- Table 47 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2025-2030
- Table 48 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2025-2030

#### Ice Cream in Thailand

#### **KEY DATA FINDINGS**

#### 2025 DEVELOPMENTS

Thailand's ice cream market declines due to economic factors and competition from unpackaged ice cream Unilever leads while Chomthana benefits from innovation and fan marketing

Small local grocers leads distribution while e-commerce is the most dynamic channel

## PROSPECTS AND OPPORTUNITIES

Ice cream set to benefit from premiumisation with new flavours and formats Seasonal and collaborative product introductions set to drive innovation Players responding to the call for healthier ice cream options

#### CATEGORY DATA

- Table 49 Sales of Ice Cream by Category: Volume 2020-2025
- Table 50 Sales of Ice Cream by Category: Value 2020-2025
- Table 51 Sales of Ice Cream by Category: % Volume Growth 2020-2025
- Table 52 Sales of Ice Cream by Category: % Value Growth 2020-2025
- Table 53 Sales of Ice Cream by Leading Flavours: Rankings 2020-2025
- Table 54 Sales of Impulse Ice Cream by Format: % Value 2020-2025
- Table 55 NBO Company Shares of Ice Cream: % Value 2021-2025
- Table 56 LBN Brand Shares of Ice Cream: % Value 2022-2025
- Table 57 NBO Company Shares of Impulse Ice Cream: % Value 2021-2025
- Table 58 LBN Brand Shares of Impulse Ice Cream: % Value 2022-2025
- Table 59 NBO Company Shares of Take-home Ice Cream: % Value 2021-2025
- Table 60 LBN Brand Shares of Take-home Ice Cream: % Value 2022-2025
- Table 61 Distribution of Ice Cream by Format: % Value 2020-2025
- Table 62 Forecast Sales of Ice Cream by Category: Volume 2025-2030
- Table 63 Forecast Sales of Ice Cream by Category: Value 2025-2030
- Table 64 Forecast Sales of Ice Cream by Category: % Volume Growth 2025-2030
- Table 65 Forecast Sales of Ice Cream by Category: % Value Growth 2025-2030

# Savoury Snacks in Thailand

# KEY DATA FINDINGS

# 2025 DEVELOPMENTS

Sales rise with meat snacks benefiting from trend towards high protein diets

Pepsi-Cola's Lay's brand leads with its extensive and affordable product line

Hypermarkets the largest and most dynamic distribution channel in savoury snacks

# PROSPECTS AND OPPORTUNITIES

Health trends set to spur new product development in savoury snacks Economic slowdown could impact demand and lead to shrinkflation Proposed sodium tax would reshape Thailand's savoury snacks market

# CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2020-2025

Table 67 - Sales of Savoury Snacks by Category: Value 2020-2025

- Table 68 Sales of Savoury Snacks by Category: % Volume Growth 2020-2025
- Table 69 Sales of Savoury Snacks by Category: % Value Growth 2020-2025
- Table 70 NBO Company Shares of Savoury Snacks: % Value 2021-2025
- Table 71 LBN Brand Shares of Savoury Snacks: % Value 2022-2025
- Table 72 Distribution of Savoury Snacks by Format: % Value 2020-2025
- Table 73 Forecast Sales of Savoury Snacks by Category: Volume 2025-2030
- Table 74 Forecast Sales of Savoury Snacks by Category: Value 2025-2030
- Table 75 Forecast Sales of Savoury Snacks by Category: % Volume Growth 2025-2030
- Table 76 Forecast Sales of Savoury Snacks by Category: % Value Growth 2025-2030

#### Sweet Biscuits, Snack Bars and Fruit Snacks in Thailand

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Protein/energy bars driving growth amidst developing health trends URC's variety and KCG's health and wellness focus shaping market demand Hypermarkets lead sales while e-commerce seeing strong development

# PROSPECTS AND OPPORTUNITIES

Demand for high-quality ingredients set to fuel premiumisation trend
Brand collaborations and character licensing set to drive innovation
Health and wellbeing set to be a focus of new product development and marketing

#### **CATEGORY DATA**

- Table 77 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2020-2025
- Table 78 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2020-2025
- Table 79 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2020-2025
- Table 80 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2020-2025
- Table 81 NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2025
- Table 82 LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2022-2025
- Table 83 NBO Company Shares of Sweet Biscuits: % Value 2021-2025
- Table 84 LBN Brand Shares of Sweet Biscuits: % Value 2022-2025
- Table 85 NBO Company Shares of Snack Bars: % Value 2021-2025
- Table 86 LBN Brand Shares of Snack Bars: % Value 2022-2025
- Table 87 NBO Company Shares of Fruit Snacks: % Value 2021-2025
- Table 88 LBN Brand Shares of Fruit Snacks: % Value 2022-2025
- Table 89 Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2020-2025
- Table 90 Distribution of Sweet Biscuits by Format: % Value 2020-2025
- Table 91 Distribution of Snack Bars by Format: % Value 2020-2025
- Table 92 Distribution of Fruit Snacks by Format: % Value 2020-2025
- Table 93 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2025-2030
- Table 94 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2025-2030
- Table 95 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2025-2030
- Table 96 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2025-2030

## 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 focusing 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/snacks-in-thailand/report.