



Uncovering Need States in Asia Pacific: Beverages

April 2025

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Consumer need states in Asia Pacific range from physical to mental wellbeing

What are need states?

Drivers of need state mindsets of consumers in Asia Pacific

Euromonitor's need states framework

Key challenges to beverage need state positioning for consumers in Asia Pacific

Winning consumers through incorporating need states in product positioning

CURRENT STATE OF PLAY OF NEED STATES IN BEVERAGES IN ASIA PACIFIC

Energy need state remains dominant in non-alcoholic drinks in Asia Pacific

Quantifying need states critical for beverage brands to assess commercial opportunity

Proof of concept provides a holistic view of the need states market in soft drinks

Juice: Maintenance and reset remain the dominant need states in China and India

Leading juice players appeal to local consumers' need states with vitamins and flavours

RTD tea: Reset need state continues to dominate yet maintenance need state set to grow

Innovative concepts of RTD tea positioned as reset and recreation need states

Energy drinks: Energy boosting claims dominate, yet new need states are set to emerge

Product innovations in emerging markets remain focused on energy drink need states

Sports drinks: Reset and energy dominate, while maintenance starts to become popular

Sports drinks see constant innovation with new flavours to excite consumers

EMERGING NEED STATES IN BEVERAGES IN ASIA PACIFIC

Appealing to various consumer segments will drive the growth of nascent need states

Focus: The next great need state in a distracted world

Recreation: The next need state beyond physical and mental wellbeing

CONCLUSION

Recommendations for applying need states in your beverage portfolio in Asia Pacific

Evolution of need states across beverages in Asia Pacific

Questions we are asking

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