



Carbonates in Thailand

November 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Innovation and lifestyles drive growth for carbonates in Thailand

INDUSTRY PERFORMANCE

Reduced sugar variants propel growth, but artificial sweetener concerns linger
Impulse enjoyment and culinary pairing drive the enduring appeal of carbonates

WHAT'S NEXT?

Health consciousness is set to redefine Thailand's carbonates landscape
Marketing wars to intensify as brands vie for lifestyle integration
Quirky flavours and strategic partnerships set to drive brand relevance in carbonates

COMPETITIVE LANDSCAPE

Coca-Cola's personalisation drive connects with Generation Z in carbonates
Singha maintains its dynamic ascent: due to health, heritage, and innovation

CHANNELS

Convenience retailer and QSR partnerships shape the distribution of carbonates
Bulk purchasing and strategic promotions are reshaping carbonates distribution

CATEGORY DATA

- Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
- Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
- Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
- Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
- Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
- Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025
- Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
- Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
- Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025
- Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025
- Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
- Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
- Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
- Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
- Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
- Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
- Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
- Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
- Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030
- Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

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

Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Thailand

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SOURCES

Summary 1 - Research Sources

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