



Euromonitor
International

Hot Drinks in Thailand

November 2025

Table of Contents

EXECUTIVE SUMMARY

Price sensitivity, wellness trends, and innovation shape market dynamics

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

- Rising costs influence consumers’ purchasing decisions
- Players must balance affordability with innovation
- Foodservice experience is evolving in Thailand
- Sustainability initiatives focus on packaging and local ingredients

WHAT’S NEXT?

- Despite positive outlook for hot drinks, challenges will remain
- Further rise of health and wellness trend to drive product development
- Innovation and diversification essential to adapt to changing demands

COMPETITIVE LANDSCAPE

- Nestlé (Thai) Ltd retains dominance through wide product portfolio
- Rising interest in Japanese products drives strong growth of OSK Sencha Green Tea

CHANNELS

- Wide geographical reach supports distribution via small local grocers
- The role of e-commerce continues to evolve in the distribution of hot drinks
- Foodservice vs retail split

MARKET DATA

- Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
- Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
- Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
- Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025
- Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
- Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
- Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
- Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
- Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
- Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
- Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
- Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
- Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
- Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
- Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
- Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
- Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
- Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
- Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
- Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
- Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
- Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
- Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
- Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
- Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Coffee in Thailand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Instant coffee's enduring reign and the rise of premium pods in Thailand

INDUSTRY PERFORMANCE

Further growth in 2025 as convenient instant coffee drives overall demand

Urban and young professionals drive dynamic growth of fresh ground coffee pods

WHAT'S NEXT?

Promotional strategies to diverge between mass and premium coffee segments

Digital and technological advancements will drive efficiency and traceability

Health and wellness to redefine coffee consumption and product innovation

COMPETITIVE LANDSCAPE

Nestlé (Thai) Ltd's dominance supported by Nescafé portfolio

Rising demand for capsules drives dynamic growth of Nestlé Nespresso

CHANNELS

Consumers value convenience and different formats when purchasing coffee

Dynamic growth for e-commerce supported by subscription models

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

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

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

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

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

COUNTRY REPORTS DISCLAIMER

[Tea in Thailand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price rises drive consumer shifts while instant tea fuels dynamic growth

INDUSTRY PERFORMANCE

Navigating price hikes and evolving consumer habits in 2025

Flavour innovation and premiumisation drive dynamic growth in instant tea

WHAT'S NEXT?

Competition and wellness trends to shape a more niche-driven tea market
Product and processing innovation will drive convenience and premiumisation
Legislative environment and health awareness to strengthen functional and sustainable tea development

COMPETITIVE LANDSCAPE

Siam FB Products Co Ltd retains lead of competitive landscape
Competition intensifies in green tea
Increasing fragmentation proves a challenge for smaller or mid-tier players

CHANNELS

Hypermarkets leads, while supermarkets' growth is driven by premium offerings
E-commerce continues to make gains from low base

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Other Hot Drinks in Thailand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability, wellness, and digital transformation drive category evolution

INDUSTRY PERFORMANCE

Economic pressures reshape the role of chocolate and malt-based hot drinks
Cereal-based options help drive demand for other plant-based hot drinks

WHAT'S NEXT?

Price pressures and adult repositioning to reshape other hot drinks in Thailand
Digital and technological advancements will help strengthen value communication and functional proof
Health and wellness can reframe everyday consumption and renew occasions

COMPETITIVE LANDSCAPE

Ovaltine and Milo remain dominant through brand familiarity and price promotions
Local challengers redefine market momentum

CHANNELS

Small local grocers anchor accessibility to other hot drinks
Modern channels reshape reach with convenience stores recording strong growth
E-commerce's further share gain driven by convenience and competitive pricing

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/hot-drinks-in-thailand/report.