THAILAND BEVERAGE TRENDS 2026

How consumer expectations are reshaping the category



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Beverage growth remains measured, raising the bar for differentiation

Domestic Sales Volume: Average Annual Forecast For 2026–2028

1.9–2.9%

NON-ALCOHOLIC BEVERAGES

2.1–3.1%

BOTTLED & MINERAL WATER

1.8–2.8%

CARBONATED DRINKS & SODA

HEADWINDS

Weak purchasing power, rising production and packaging costs.

TAILWINDS

Heat-related demand, wider retail access and functional innovation.



Source: Krungsri Industry Outlook report 2026-2028

Consumers are becoming more selective about everyday spending

Even as consumers seek healthier, more premium and innovative beverages, affordability remains an important consideration. Brands need to demonstrate why a product is worth choosing - whether through tangible functional benefits, quality, convenience or an accessible price point.

58%

of Thai consumers expect **food shopping** costs to increase

53%

Feel ***less comfortable*** making major purchases

40%

Feel **less comfortable** making other household purchases

61%

Describe Thailand's current economic situation as ***bad***

Sources: Ipsos Cost of Living Monitor 2026; Ipsos Global Advisor (What Worries the World?; Global Consumer Confidence Index)

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Different occasions drive different beverage needs

MORNING

Wake-up & routine

Coffee | Tea | Matcha

WORK / STUDY

Hydrate & focus

Water | Functional drinks

ON-THE-GO

Quick refreshment

RTD tea | Water

SOCIAL / CAFÉ

Discovery & indulgence

Craft tea | Coffee | Matcha

FITNESS

Replenish & perform

Electrolytes | Protein RTDs | Sports drinks

AT HOME / NIGHT

Relax & unwind

Caffeine-free tea | Non-caffeinated drinks

Sources: The Prachakorn article (2026); Grab Thailand article (2026); MarketThink article (2026); Line Man Wongnai website

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Three consumer shifts are reshaping beverage trend

Evolving consumer expectations around health, experience and innovation are creating new opportunities for beverage brands

01 MORE HEALTH-CONSCIOUS

Better-for-you choices with tangible benefits

- Less sweetness
- Enhanced hydration
- Functional wellness & nutrition

02 MORE EXPERIENCE-LED

Quality, ritual and discovery elevate familiar drinks

- Matcha rituals
- Milk tea & specialty coffee
- Fruit-tea discovery

03 MORE INNOVATION-DRIVEN

New combinations and formats expand occasions

- Café-to-RTD
- Hybrid flavors
- Natural ingredient combinations



Source: Ipsos Social Listening Tool- Synthesio (2026)

01

MORE HEALTH-CONSCIOUS

From reducing sugar to seeking purposeful health benefits

- Less sweetness
- Enhanced hydration
- Functional wellness & nutrition



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Health is becoming a more active consumer priority

Thai consumers are becoming **more proactive** about managing their health.

This creates opportunities for beverages that offer understandable, credible benefits beyond basic refreshment — from hydration and nutrition to gut health and everyday wellness.

85%

of Thai consumers would like more control over decisions about their health

82%

Actively research health information themselves

78%

always try to find out information on healthcare by themselves, rather than relying solely on doctors

52%

Expect to live to 100 years old

Sources: Ipsos Global Trends 2026; Ipsos Health Service Monitor

Health ambitions extend beyond physical wellbeing

Thai consumers increasingly recognize the importance of taking care of **both** their **physical and mental wellbeing**, with **healthy eating** remaining a central part of their approach to maintaining good health.

96%

Thais say they need to do more to look after themselves physically

89%

Want to do more to look after their mental wellbeing

90%

Say eating right is the most important thing they can do to maintain good health

76%

Are willing to sacrifice convenience for healthier products

Sources: Ipsos Global Trends 2024-2026; Ipsos Health Service Monitor

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Lower sweetness is moving into the mainstream

Healthier choices are moving from optional tweaks to everyday defaults.

50%

default “normal sweetness” under the 2026 public-health initiative

14 participating brands and 30,000+ outlets

>50%

increase in orders for beverages with 0-75% sweetness on GrabFood

10M+

annual orders for black coffee and clear matcha (both with 0% sugar) combined on Grab



Sources: Thailand Dept. of Health article (2026); Grab Thailand press release (2026)

Greater control and transparency are reshaping beverage choices

FROM CUSTOMIZATION

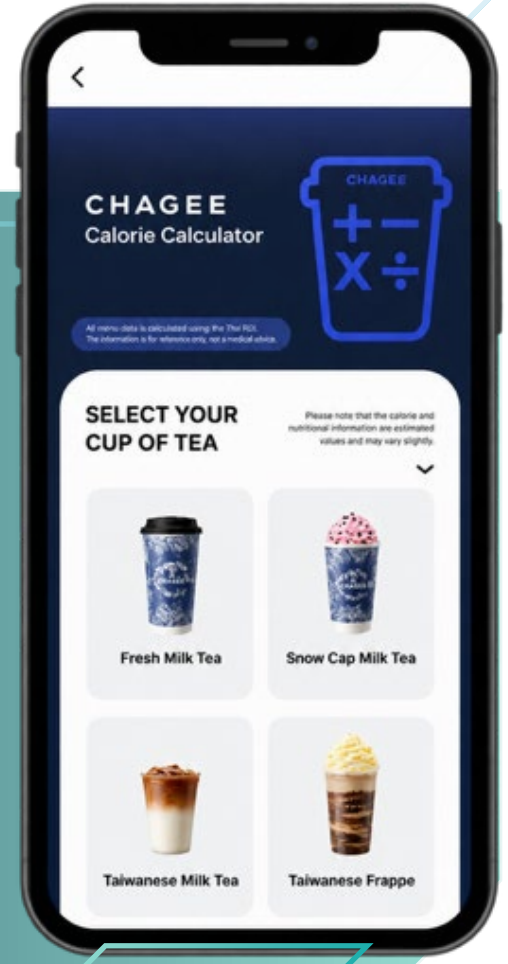
Choose sweetness and serving size

Consumers can adjust sweetness levels and serving sizes to match their preferences while continuing to enjoy familiar beverages.

TO INFORMATION AT ORDERING

CHAGEE calorie calculator

Launched in Thailand in Oct 2026, showing calories, sugar, protein, fat, carbs and caffeine as customers customize size, temperature and sweetness.



Source: Marketech APAC article (2026)

Hydration increasingly comes with a specific proposition

Everyday hydration is evolving through added minerals, vitamins and targeted benefits.

FROM BASIC TO VALUE-ADDED

Mineral, alkaline and vitamin-enriched waters add distinct propositions to an everyday essential category.

ICHITAN ALKALINE WATER

Ichitan identified its alkaline water as a Q2 growth driver and expected 2026 sales above THB 1bn.



SUNTORY HY! WATER LOCK

Yuzu-flavored drink with vitamins and minerals, designed around office workers in air-conditioned settings.



Sources: Krungsri industry outlook report (2026); Ichitan Group website; Suntory PepsiCo press release (2026)

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Functional beverage innovation is becoming more targeted

Energy, hydration and nutrition are becoming more specialized around specific consumer needs.

01 ENERGY

Zero-Sugar Energy Drinks

New variants pair energy cues with lower-sugar choices and lifestyle positioning.



02 HYDRATION

Functional Sports Hydration

Electrolyte replenishment is being paired with zero-sugar, zero-calorie options.



03 NUTRITION

Ready-to-Drink Protein Beverages

RTD protein drinks are growing on delivery platforms, supported by fitness and wellness occasions.

3.5×

YEAR-ON-YEAR SALES

450K+ bottles sold annually on GrabMart



BEYOND DRINKS

Sponsor Pro Gel+

An electrolyte-infused energy gel for endurance exercise - evidence of sports-drink brands moving into adjacent sports nutrition.

Sources: Ipsos Synthesio 2026; ThaiNamthip website; Suntory PepsiCo website; TCP Group press release (2026); Grab Thailand press release (2026)

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The next wellness wave extends to gut health and beauty

Functional innovation is expanding into digestion, beauty and everyday wellness.

80%

of surveyed Thai consumers bought health-focused food and drinks in the past year

GUT HEALTH

+5 probiotic strains newly permitted for food use by the Thai FDA in 2026

Example: QminC probiotic açai smoothie; Ally Pro Fiber



BEAUTY & WELLNESS

Collagen, fibre and vitamin combinations are entering functional drink concepts.

Example: MI-IN Peach Collagen Soda; COCO ROYAL Coconut Water Peach; SAPPE Beauti Collagen Tea



Sources: PwC Thailand consumer survey report (2026); Thai FDA website (2026); Mini Me Insights article (2025 & 2026)

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02

MORE EXPERIENCE-LED

Quality, ritual and playful discovery elevate familiar drinks

- Matcha rituals
- Milk tea & specialty coffee
- Fruit-tea discovery



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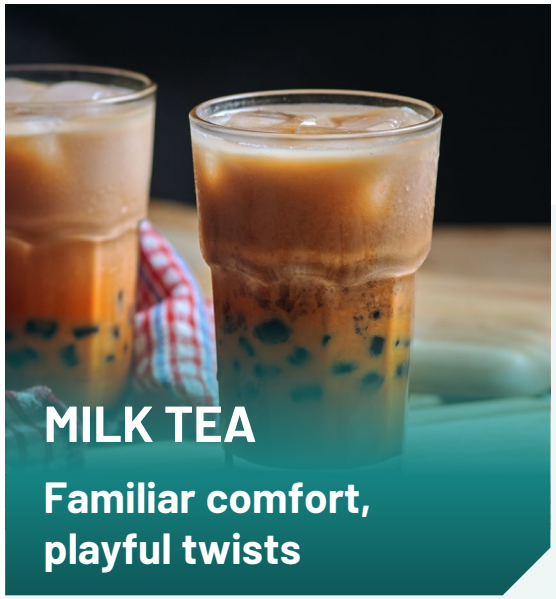
Familiar drinks, new reasons to trade up



MATCHA

Authenticity and ritual

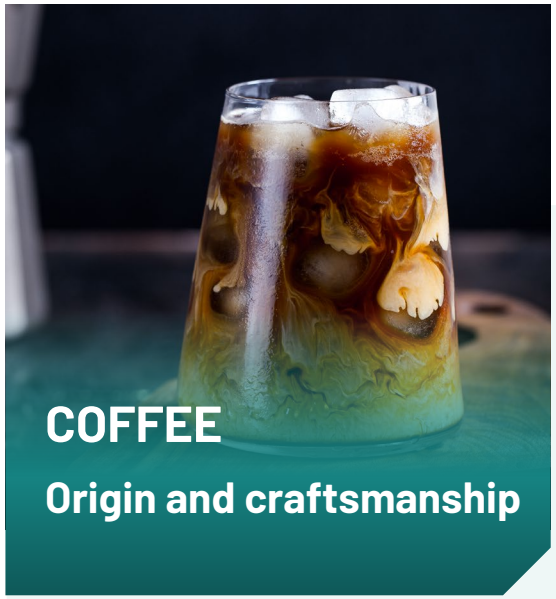
Matcha is among 2026 "calm luxury" flavors; zero-sugar clear matcha also appears among Grab's high-order health-oriented drinks.



MILK TEA

Familiar comfort, playful twists

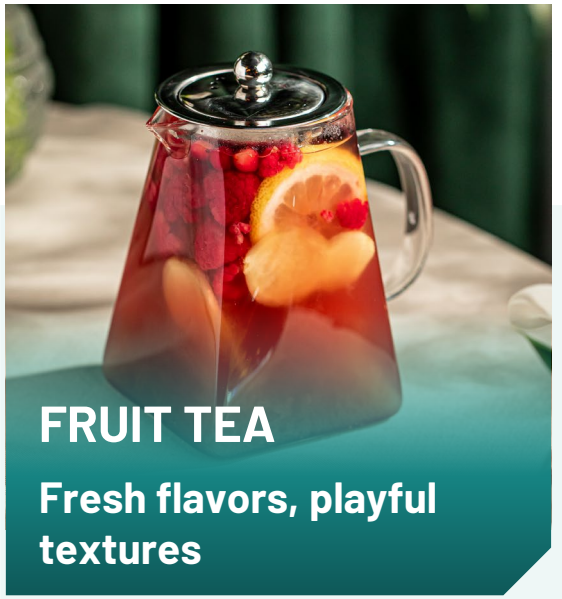
Taro milk-tea orders more than doubled on GrabFood.



COFFEE

Origin and craftsmanship

Specialty coffee accounts for 16% of Thailand's coffee consumption by volume but generates 48% of the market's value.



FRUIT TEA

Fresh flavors, playful textures

Fruit tea is being reinvented through peach, mandarin and berry combinations, alongside toppings such as fruit jelly and tapioca.

Sources: Grab Thailand press release (2026); Specialty Coffee Association of Thailand article (2026)

Matcha is becoming a premium ritual

80+

Matcha Brands

Showcased at Taste of Tea 2026, reflecting growing market interest and an expanding range of matcha offerings.

Ritual and authenticity add meaning

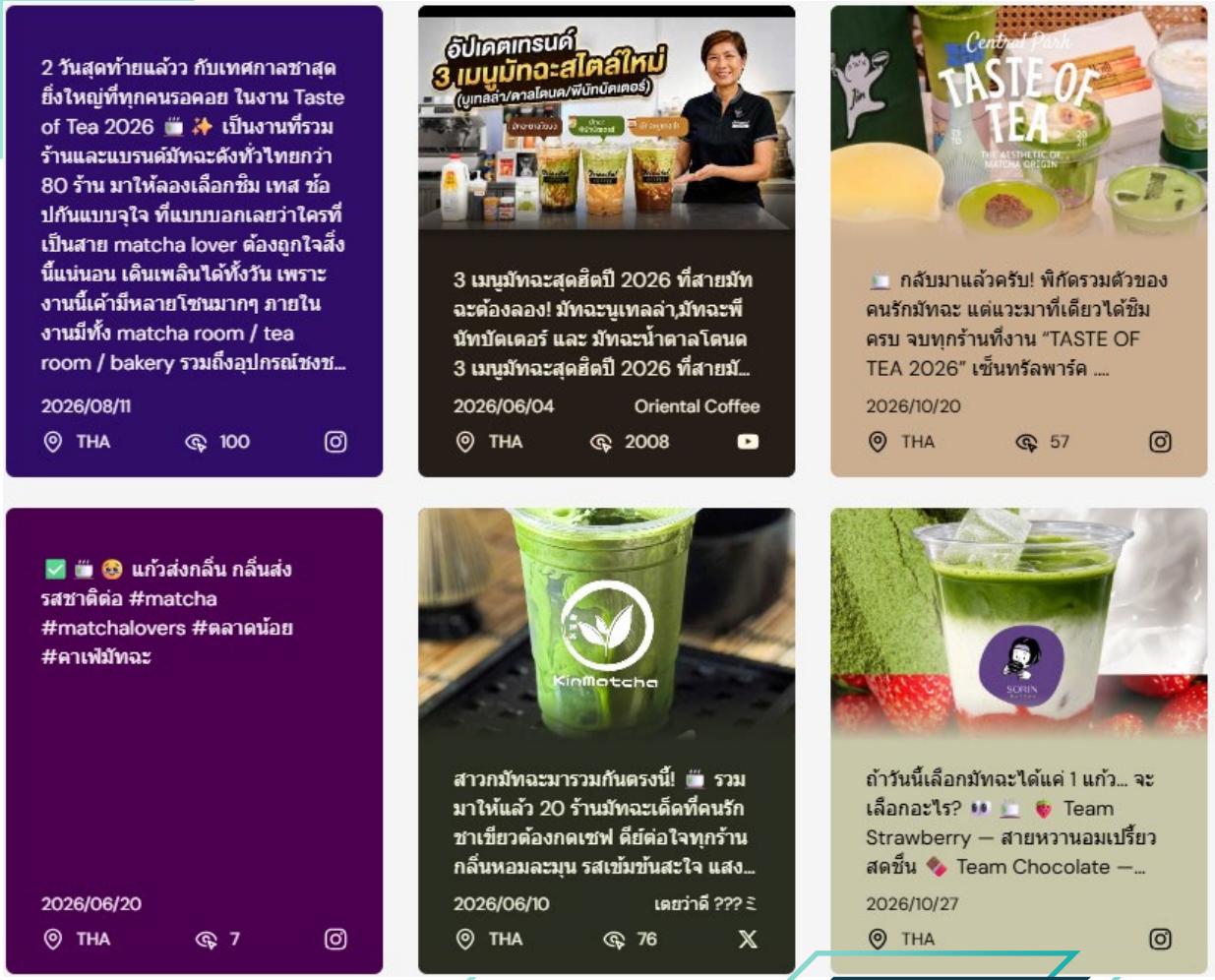
Consumers are drawn to matcha's cultural heritage, preparation rituals and perceived health benefits.

Premium aesthetics drive appeal

Beautifully crafted, Instagram-worthy drinks turn matcha into a lifestyle and self-expression choice.

Flavor Innovation Expands Occasions

Matcha lattes, creative flavor pairings and matcha-based desserts bring new experiences to the category.



Source: Ipsos Synthesio 2026

Milk Tea Gets A Playful Upgrade

#1

Drink In The Campaign

Thai tea was the most ordered beverage in GrabFood's June 2026 co-payment campaign.

Familiar flavors anchor demand

Thai tea remains an accessible, recognizable favorite.

Textures refresh the category

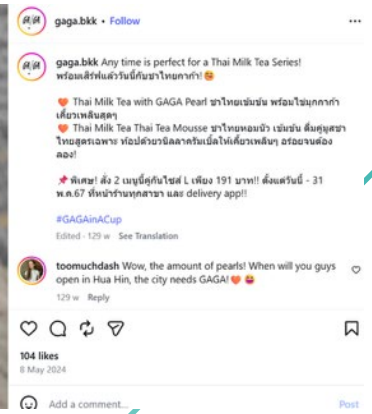
Mochi, chewy pearls and creamy toppings add sensory interest.

Personalization drives choice

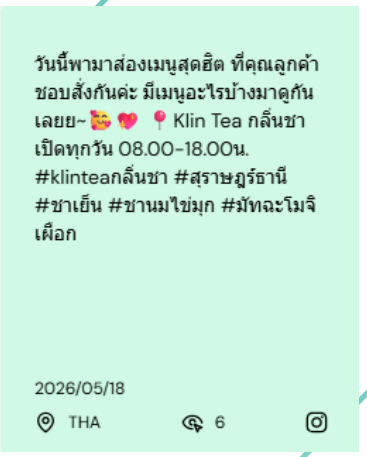
Sweetness and topping options help create a drink for every mood.











Sources: Ipsos Synthesio 2026; Grab Thailand press release (2026)

Specialty coffee commands a premium

A quality-first coffee culture

Coffee becomes more than a caffeine fix, with greater attention to bean origins, flavor profiles and craftsmanship.

Authenticity drives appreciation

Single-origin beans, specialty blends and distinctive flavor profiles appeal to consumers seeking quality and provenance.

Craftsmanship elevates the experience

Artisanal brewing methods and careful preparation turn everyday coffee into a more considered ritual.

Café culture creates social value

Premium coffee, thoughtfully curated spaces and quality bakery pairings make cafés destinations to connect, explore and unwind.









Source: Ipsos Synthesio 2026

Fruit Tea Brings Fresh Flavor Innovation

Fruit takes centre stage

Peach, mandarin and berry combinations bring refreshing fruit-forward flavors to traditional tea.

Fresh flavors drive appeal

Fruit-forward combinations offer refreshing taste experiences, balancing authentic tea notes with natural fruit flavors.

Textures add sensory excitement

Tapioca, fruit pieces and jelly toppings introduce playful textures and make each drink more engaging.

Innovation expands occasions

Creative fruit-tea recipes, ready-to-drink formats and visually appealing presentations bring new ways to enjoy tea.



Source: Ipsos Synthesio 2026

03

MORE INNOVATION-DRIVEN

New ingredients, flavor combinations and formats expand beverage possibilities

- Café-to-RTD
- Hybrid flavors
- Natural ingredient combinations



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Café-inspired drinks extend into ready-to-drink formats

Premium recipes and specialty café concepts are reaching consumers through more accessible retail formats.

01

CAFÉ FLAVORS IN RTD

Premium tea bases are paired with fruit and floral notes in convenient packaged formats.



TEAPLUS Fuji Apple and Lychee Osmanthus Oolong Tea; Royal Plus MABU Fruit Tea.

02

SPECIALTY BRANDS IN RETAIL

Specialty tea and café brands are extending signature offers into convenience-store shelves.



JIANCHA Matcha Strawberry at 7-Eleven Thailand.

Sources: Suntory PepsiCo press release (2026); Royal Plus article (2026); CPG Asia article (2026)

Unexpected flavor combinations create fresh discovery cues

Unexpected combinations are creating new reasons to explore familiar beverage categories.

HERBAL × COCONUT

Yen Yen × Thai COCO

Partnership with Thai Coconut PCL introducing a herbal tea blended with coconut water.



SODA × DESSERT

Pepsi Treats

Pepsi's signature fizz with strawberry and cream flavor in a zero-sugar formula.



SODA × TEA

Sprite + Tea

Sprite's signature lemon-lime taste with smooth tea flavor notes,



Sources: Ichitan Group article (2026); Suntory PepsiCo press release (2026); Coca-Cola press release (2026)

Natural ingredients are powering new beverage formulations

From familiar ingredients to new flavours, functions and beverage experiences.

CROSS-CATEGORY PAIRING



MALEE COCO | Coconut Matcha

Coconut water paired with Uji matcha brings two established drink cues into one proposition.

FUNCTIONAL ENHANCEMENT



HYDAILY | Coconut + Botanicals

Coconut water with L-theanine and goji berry offers a more targeted hydration proposition.

INGREDIENT REINVENTION



MIVANA | Coffee Cherry Shot

Coffee cherry pulp from Chiang Rai is repurposed as a distinctive beverage ingredient.

Sources: Malee Group article (2026); Mini Me Insights article (2026); Siam Turakij article (2026)

What it means for brands

Make Healthier Choices Mainstream

Embed lower sweetness and relevant functional benefits into everyday ranges, supported by clear nutrition and benefit cues.

Give Consumers A Reason To Trade Up

Highlight ingredient quality, origin and craftsmanship to communicate a premium experience worth paying for.

Innovate From Familiar Favorites

Build on recognizable tea and fruit flavors with new pairings and textures that make exploration feel accessible.

Design For Real Drinking Moments

Bring café-inspired experiences into convenient formats for work, travel and on-the-go refreshment.



In a value-conscious market, successful beverage brands will be those that make differentiation meaningful and justify paying for.

THANK YOU

Gayatri Soares
Chief Client Officer,
Ipsos in Thailand

Gayatri.Soares@ipsos.com

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