

# Alcoholic Drinks in Thailand

June 2023

**Table of Contents** 

## Alcoholic Drinks in Thailand

# **EXECUTIVE SUMMARY**

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

## MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 1 - Number of On-trade Establishments by Type 2016-2022

## TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

# OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

# KEY NEW PRODUCT LAUNCHES

Premiumisation strategies

Targeting young consumers of legal drinking age

Outlook

## MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

# MARKET DATA

- Table 3 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
- Table 4 Sales of Alcoholic Drinks by Category: Total Value 2017-2022
- Table 5 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
- Table 6 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

  Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
- Table 10 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
- Table 11 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
- Table 12 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
- Table 13 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
- Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
- Table 15 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
- Table 16 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
- Table 17 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

## **DISCLAIMER**

## **SOURCES**

Summary 2 - Research Sources

## Beer in Thailand

## **KEY DATA FINDINGS**

## 2022 DEVELOPMENTS

Global inflation causes beer prices to surge

New regulation supports development of microbreweries

Beer's recovery driven by country reopens

# PROSPECTS AND OPPORTUNITIES

Domestic lager dominates the market

Aggressive movement from market leaders

Healthy premium choice becomes the key innovation focus amongst international players

## CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2022

## **CATEGORY DATA**

- Table 18 Sales of Beer by Category: Total Volume 2017-2022
- Table 19 Sales of Beer by Category: Total Value 2017-2022
- Table 20 Sales of Beer by Category: % Total Volume Growth 2017-2022
- Table 21 Sales of Beer by Category: % Total Value Growth 2017-2022
- Table 22 Sales of Beer by Off-trade vs On-trade: Volume 2017-2022
- Table 23 Sales of Beer by Off-trade vs On-trade: Value 2017-2022
- Table 24 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 25 Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 26 Sales of Beer by Craft vs Standard 2017-2022
- Table 27 GBO Company Shares of Beer: % Total Volume 2018-2022
- Table 28 NBO Company Shares of Beer: % Total Volume 2018-2022
- Table 29 LBN Brand Shares of Beer: % Total Volume 2019-2022
- Table 30 Forecast Sales of Beer by Category: Total Volume 2022-2027
- Table 31 Forecast Sales of Beer by Category: Total Value 2022-2027
- Table 32 Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027
- Table 33 Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

# Cider/Perry in Thailand

# **KEY DATA FINDINGS**

# 2022 DEVELOPMENTS

Consumption after COVID-19 accelerates cider/perry market in 2022

Local preferences weaken demand for cider/perry

International brands extending their reach

# PROSPECTS AND OPPORTUNITIES

Local brand building platform for further development

Premium image weakens cider/perry's opportunity

On-trade growth

# **CATEGORY DATA**

- Table 34 Sales of Cider/Perry: Total Volume 2017-2022
- Table 35 Sales of Cider/Perry: Total Value 2017-2022
- Table 36 Sales of Cider/Perry: % Total Volume Growth 2017-2022
- Table 37 Sales of Cider/Perry: % Total Value Growth 2017-2022
- Table 38 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
- Table 40 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 41 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 42 GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 43 NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 44 LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
- Table 45 Forecast Sales of Cider/Perry: Total Volume 2022-2027
- Table 46 Forecast Sales of Cider/Perry: Total Value 2022-2027
- Table 47 Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
- Table 48 Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

# Rtds in Thailand

# **KEY DATA FINDINGS**

## 2022 DEVELOPMENTS

RTDs market recovers, thanks to on-the-go consumption potential

Price-sensitive attitude impedes consumer choices

Siam Winery and its Spy brand maintains outright lead in 2022

## PROSPECTS AND OPPORTUNITIES

RTDs players seek further opportunity to grasp shochu/soju demand

Smirnoff Midnight highlights the market's growth

Potential for the development of products with a healthier positioning

# **CATEGORY DATA**

- Table 49 Sales of RTDs by Category: Total Volume 2017-2022
- Table 50 Sales of RTDs by Category: Total Value 2017-2022
- Table 51 Sales of RTDs by Category: % Total Volume Growth 2017-2022
- Table 52 Sales of RTDs by Category: % Total Value Growth 2017-2022
- Table 53 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
- Table 54 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
- Table 55 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 56 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 57 GBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 58 NBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 59 LBN Brand Shares of RTDs: % Total Volume 2019-2022
- Table 60 Forecast Sales of RTDs by Category: Total Volume 2022-2027
- Table 61 Forecast Sales of RTDs by Category: Total Value 2022-2027
- Table 62 Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
- Table 63 Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

# Spirits in Thailand

# KEY DATA FINDINGS

# 2022 DEVELOPMENTS

Rise in global oil price shocks the market

Spirits sales increase through on-trade channels thanks to the recovery of tourism

Domestic manufacturers dominate

## PROSPECTS AND OPPORTUNITIES

Premiumisation becomes the key marketing strategy for leading player

Change in consumers' behaviour after pandemic impacts spirits

Giant companies tapping into shochu/soju

## CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 4 - Benchmark Brands 2022

#### **CATEGORY DATA**

Table 64 - Sales of Spirits by Category: Total Volume 2017-2022

Table 65 - Sales of Spirits by Category: Total Value 2017-2022

Table 66 - Sales of Spirits by Category: % Total Volume Growth 2017-2022

Table 67 - Sales of Spirits by Category: % Total Value Growth 2017-2022

Table 68 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022

Table 69 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022

Table 70 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 71 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022

Table 72 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022

Table 73 - Sales of White Rum by Price Platform: % Total Volume 2017-2022

Table 74 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022

Table 75 - Sales of English Gin by Price Platform: % Total Volume 2017-2022

Table 76 - Sales of Vodka by Price Platform: % Total Volume 2017-2022

Table 77 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022

Table 78 - GBO Company Shares of Spirits: % Total Volume 2018-2022

Table 79 - NBO Company Shares of Spirits: % Total Volume 2018-2022

Table 80 - LBN Brand Shares of Spirits: % Total Volume 2019-2022

Table 81 - Forecast Sales of Spirits by Category: Total Volume 2022-2027

Table 82 - Forecast Sales of Spirits by Category: Total Value 2022-2027

Table 83 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 84 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

## Wine in Thailand

## **KEY DATA FINDINGS**

## 2022 DEVELOPMENTS

Country's reopening drives the growth of on-trade

Still red wine leads the wine market

Siam Winery maintains its leading position with Mont Clair

# PROSPECTS AND OPPORTUNITIES

Penfolds adapts business plan to changing consumer lifestyles and tastes

Imported wine sees greater opportunity

Modern grocery retailers remains the largest channel thanks to its convenience, and price promotions

# **CATEGORY DATA**

Table 85 - Sales of Wine by Category: Total Volume 2017-2022

Table 86 - Sales of Wine by Category: Total Value 2017-2022

Table 87 - Sales of Wine by Category: % Total Volume Growth 2017-2022

Table 88 - Sales of Wine by Category: % Total Value Growth 2017-2022

Table 89 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022

- Table 90 Sales of Wine by Off-trade vs On-trade: Value 2017-2022
- Table 91 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 92 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 93 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 94 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 95 Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 96 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 97 GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 98 NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 99 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022
- Table 100 GBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 101 NBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 102 LBN Brand Shares of Champagne: % Total Volume 2019-2022
- Table 103 GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 104 NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 105 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022
- Table 106 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 107 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 108 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022
- Table 109 Forecast Sales of Wine by Category: Total Volume 2022-2027
- Table 110 Forecast Sales of Wine by Category: Total Value 2022-2027
- Table 111 Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
- Table 112 Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

# 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/alcoholic-drinks-in-thailand/report.