Euromonitor International

Staple Foods in Thailand

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Staple Foods in Thailand

EXECUTIVE SUMMARY

Cost pressures reshape staple food spending

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Staple foods benefits from home-cooking trend
Health and wellness continues to have strong impact on development

WHAT'S NEXT?

Affordability as key growth driver
Health and wellness trends set to accelerate and expand
Premiumisation and innovative flavours will shape progress

COMPETITIVE LANDSCAPE

Thai President Foods maintains overall leadership in 2025
Private label expands as living cost rise

CHANNELS

Modern trade dominates distribution
Proximity and favourable prices support growth in convenience channel

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Rising prices shift dessert occasions into retail

INDUSTRY PERFORMANCE

Cakes and packaged bread gain ground as alternatives to foodservice desserts
Pastries drives overall growth

WHAT'S NEXT?

Convenience trend to benefit RTE packaged baked goods
Organic and natural demand set to accelerate
Matcha variants will become more prevalent in baked goods items

COMPETITIVE LANDSCAPE

President Bakery maintains leadership through response to current preferences
Leading player invests in indulgence-based innovation

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2025 DEVELOPMENTS

Granola-led innovation strengthens breakfast cereals

INDUSTRY PERFORMANCE

Consumers show increased interest in nutrition
RTE cereals sees growth fuelled by granola

WHAT'S NEXT?

Convenience channel set to see further expansion within breakfast cereals
Muesli and granola will continue to attract attention thanks to alignment with current health trends
Flavour innovations designed pique consumers' interest

COMPETITIVE LANDSCAPE

Brunch Time leads through Diamond Grains in granola
Diamond Grains benefits from strong online presence

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CATEGORY DATA

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Shelf stable fruit favoured for home cooking
Frozen processed potatoes prove popular thanks to convenience

WHAT'S NEXT?

Home cooking trend to fuel further strong growth for frozen vegetables and potatoes
Rising interest in frozen variants driven by increased health awareness
Sustainability efforts set to increase as environmental concerns accelerate

COMPETITIVE LANDSCAPE

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Rising living costs support private label growth

CHANNELS

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KEY DATA FINDINGS

2025 DEVELOPMENTS

At-home eating drives demand for convenient proteins

INDUSTRY PERFORMANCE

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Consumers remain highly cost conscious

WHAT'S NEXT?

Thai consumers will continue to seek out value-for-money options
Health trends undermine demand for shelf stable variants
Meat and seafood substitutes will benefit from investment in innovation

COMPETITIVE LANDSCAPE

Charoen Pokphand leads through CP easy-to-prepare formats
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CHANNELS

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Rice, Pasta and Noodles in Thailand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Home cooking supports staples demand amid cost pressures

INDUSTRY PERFORMANCE

Category products benefit from affordability and staple status
Pasta rises fastest, while rice remains key carb for Thais

WHAT'S NEXT?

Rice will continue to benefit from every-day consumptions, with pasta attracting rising interest
Players promote through health-related events
Rice to gain more premium positioning through focus on diverse flavours

COMPETITIVE LANDSCAPE

Mama leads brands with continuous innovation
Mama engages brand ambassadors to connect with younger consumers

CHANNELS

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