

Diversity in Strategies For Leading Soft Drinks Companies, Southeast Asia

June 2021

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INTRODUCTION

Overview of Southeast Asia

Key findings

SOFT DRINKS LANDSCAPE IN SOUTHEAST ASIA

Soft drinks show strong growth over historic period before pandemic

Global beverage giants Coca-Cola and PepsiCo lead in Southeast Asia

Highly fragmented soft drinks market landscape in Southeast Asia

Overview of Southeast Asia's top 10 companies' portfolios in soft drinks

STRATEGIES ADOPTED BY LEADING COMPANIES

Consumer profile key to understanding strategies adopted by companies

Immune support and legislation drive launch of healthier variants

Health: reformulation efforts by global companies

Health: other leading companies reformulate to have zero sugar variants

Health: no sugar is the key leading health claim for soft drinks companies

Health: Thai players tap into growing demand for immunity boost

Affordability remains important in emerging markets

Affordability: Wings Corp focuses on affordable products in Indonesia

Affordability: Tirta Fresindo Jaya's expands presence with RTD coffee

Affordability: TC Pharmaceutical plays the volume game in energy drinks

Opportunity for e-commerce to grow in Southeast Asia

E-commerce: companies place greater focus on home consumption

E-commerce: Coca-Cola has a higher presence of carbonates SKUs

EVALUATION OF COMPANIES' STRATEGIES

Focus on low-sugar beverages is likely to continue

Functional ingredients to differentiate from competing products

Recovery in foodservice expected, opportunities in retail remains

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