Euromonitor International

# Uncovering Need States in Asia Pacific: Beverages

April 2025

EXECUTIVE SUMMARY

Why read this report?
Key findings

INTRODUCTION

Consumer need states in Asia Pacific range from physical to mental wellbeing
What are need states?
Drivers of need state mindsets of consumers in Asia Pacific
Euromonitor's need states framework
Key challenges to beverage need state positioning for consumers in Asia Pacific
Winning consumers through incorporating need states in product positioning

CURRENT STATE OF PLAY OF NEED STATES IN BEVERAGES IN ASIA PACIFIC

Energy need state remains dominant in non-alcoholic drinks in Asia Pacific
Quantifying need states critical for beverage brands to assess commercial opportunity
Proof of concept provides a holistic view of the need states market in soft drinks
Juice: Maintenance and reset remain the dominant need states in China and India
Leading juice players appeal to local consumers' need states with vitamins and flavours
RTD tea: Reset need state continues to dominate yet maintenance need state set to grow
Innovative concepts of RTD tea positioned as reset and recreation need states
Energy drinks: Energy boosting claims dominate, yet new need states are set to emerge
Product innovations in emerging markets remain focused on energy drink need states
Sports drinks: Reset and energy dominate, while maintenance starts to become popular
Sports drinks see constant innovation with new flavours to excite consumers

EMERGING NEED STATES IN BEVERAGES IN ASIA PACIFIC

Appealing to various consumer segments will drive the growth of nascent need states
Focus: The next great need state in a distracted world
Recreation: The next need state beyond physical and mental wellbeing

CONCLUSION

Recommendations for applying need states in your beverage portfolio in Asia Pacific
Evolution of need states across beverages in Asia Pacific
Questions we are asking

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/uncovering-need-states-in-asia-pacific-

beverages/report.