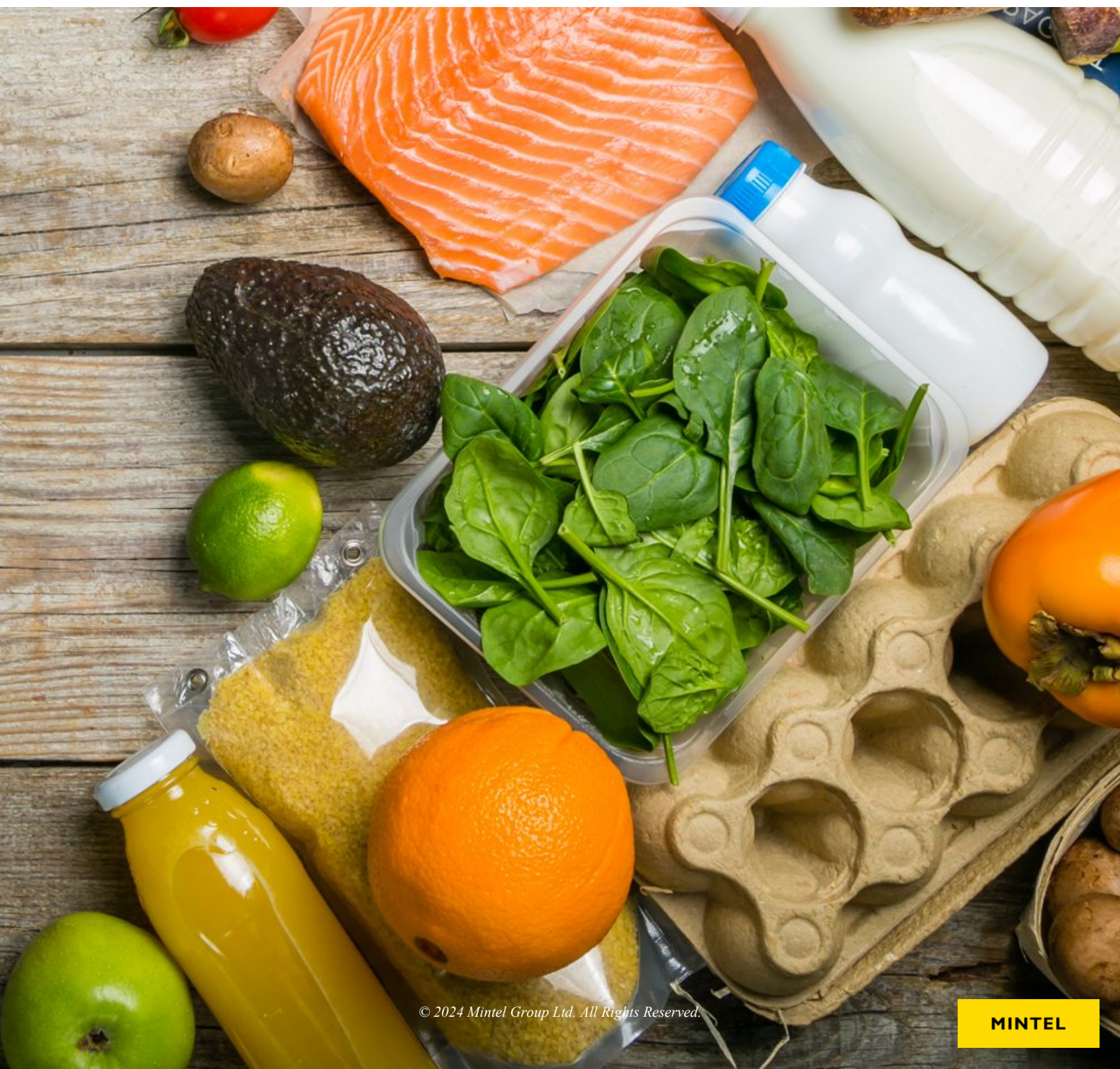


ATTITUDES TO FUNCTIONAL FOOD & DRINK – THAI CONSUMER – 2020

Strong reason-to-believe, brand trust and taste are still the key factors to drive functional food and drinks.



Pimwadee Aguilar,
Associate Director Food &
Drink - Thai Consumer



Report Content

- What you need to know

EXECUTIVE SUMMARY

- Market situation
- What consumers want and why
- Mintel predicts
- Opportunities

KEY TRENDS

- What you need to know

Global trends and how they are playing out in Thailand

- Burnout syndrome is plaguing modern societies
- Digitisation is sadly degenerating human eyes
- Longer life expectancy stimulates health consciousness
- Healthier formulations need to evolve to support healthy ageing

Key trends impacting functional food and drink in Thailand

- Haze triggers Thais to seek protection
- Consumers are becoming more knowledgeable, but also more sceptical
- Claims online are evolving to target the always-on generation and build nutritional awareness
- New 'nutrient function claim' regulations drive future market growth

CONSUMER INSIGHTS

- What you need to know
- What is functional food and drink?

The functional food and drink consumer

- Life stage and lifestyle influence consumers interests in functional food and drink
- Life stage and lifestyle influence consumers interests in functional food and drink
- 'Middle-aged' consumer segment is the key market
 - Graph 1: lifestyle factors, by age, July 2019
- Millennials are the most ingredient-savvy
 - Graph 2: functional ingredient usage, by age, July 2019

- Parenting grooms consumers into 'ingredient experts'
 - Graph 3: functional ingredient usage, by parental status, July 2019
- Opportunities exist for brands to build awareness and drive usage of less-common functional ingredients
 - Graph 4: functional ingredient awareness and usage, July 2019
- What about Gen Zs?

Consumption drivers

- Busy routines drive full-time workers into heaviest users of functional food and drink products
 - Graph 5: consumption of functional food and drink products, by employment, July 2019
- 'Naturally functional' is perceived as the better choice
 - Graph 6: consumption of functional food and drink products, July 2019
- Older demographics seek familiar formats in functional food and drink
 - Graph 7: consumption of functional food and drink products, by age, July 2019

Benefits consumers want from functional food and drinks

- Performance enhancement is the key target benefit
- Performance enhancement is the key target benefit
 - Graph 8: interest in benefits in functional food and drink, July 2019
- Dairy, snacks and juices are key categories with prominent functional claims
 - Graph 9: percentage of food and drink launches with functional claims, by subcategory, January 2019–December 2019
- Growth opportunities exist for more functional claims in all food and drinks
 - Graph 10: percentage of food and drink launches with various functional claims, January 2019 – December 2019
- Limited launches target consumers looking for brain, energy and eye health benefits
 - Graph 11: percentage of food and drink launches with claims related to brain, energy or eye health, Jan 2017–Dec 2019
- Opportunities exist for more products to address adults' brain health
 - Graph 12: top ten food and drink launches with claims related to brain health, subcategory, Jan 2019–Dec 2019
- Eye health claim is also still under-utilised to appeal to adult consumers
 - Graph 13: top ten food and drink launches with claims related to eye health, by subcategory, Jan 2019–Dec 2019
- Energy-boosting products need a new 'natural look' makeover
 - Graph 14: top food and drink launches with claims related to energy, by subcategory, Jan 2019–Dec 2019
- Highest interest for beauty enhancement from food and drink among middle-aged women
 - Graph 15: interest in benefits in functional food and drink, by age and gender, July 2019
- Naturally functional foods and drinks with immunity and sleep benefits have a winning chance among seniors
 - Graph 16: interest in added benefits in functional food and drink, by age, July 2019

Challenges for functional food and drink

- Address the knowledge gap for functional ingredients and their benefits
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- Transparency of product benefit claims is vital to maintain trust

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 - Graph 17: behaviour and perception towards functional food and drinks, July 2019
- Consumer insights in summary

MARKET APPLICATION

- Opportunities: Key areas of focus

Opportunity 1: Eliminate knowledge gap

- Call out 'naturally functional' ingredients
- Align benefits to functional ingredients using the permitted function claims
- Online communications to educate on ingredients and benefits can strengthen product reason-to-believe
- Guide selection with Healthier Choice logo
- Create unique offering with clinical trials
- Brain food, backed by neuroscience to strengthen trust

Opportunity 2: Extend functional claims to new categories

- Extend probiotic benefits beyond digestive health
- Highlight the benefit of probiotics in snackables
- New flavours for gut-health opportunities
- Evolve products with brain health benefits beyond the dairy category
- Expand energy boost benefits from energy drinks into more 'food-like' categories

Opportunity 3: Attract specific demographics with tailored functional solutions

- Eye care for the young sedentary, digital-savvy generations
- Target growing group of gamers with nootropic drinks
- Cleaner energy to refuel busy full-time workers
- Beauty innovations with improved ingredients create excitement for women
- Facilitate busy consumers in meeting their nutritional needs with innovative and tasty meal replacements
- Naturally functional options with adaptogenic ingredients to aid sleep and improve immunity for seniors
- Innovate snackable nutrition for young children

Who's innovating

- Premium ingredients and outstanding flavours
- Effective communication explains functional benefits

Global innovations

- Convenient, effective and tasty weight management solutions
- Customised products for special benefit needs
- Excite consumers with innovative products

APPENDIX

- Consumer research methodology

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