

FOOD PACKAGING TRENDS – THAI CONSUMER – 2023

Thais are looking to minimise food packaging waste. Opportunity lies in empowering responsible behaviour while delivering freshness and quality and optimising on-pack messaging.



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Food Packaging Trends - Thai Consumer - 2023

This report looks at the following areas:

- Factors that consumers consider most important in food packaging
- Consumers' perception of different food packaging materials (eg paper, plastic)
- Consumers' attitudes towards food packaging
- Consumers' behaviours regarding their choice of food packaging
- Features that consumers would be willing to pay more for in food packaging across different food/drink categories
- Features in food packaging that would drive appeal among consumers

Overview

While packaging serves several important functions, '**easiness to open**' is the most valued feature by Thais in majority of food/drink categories, indicating a **common expectation for food packaging to be convenient above all**. Beyond convenience, brands can enhance the value of food packaging through **sustainability efforts, enhanced food safety and transparency**.

Nearly half of Thais are taking a proactive approach to reduce their food packaging waste. However, the environmental impact of a food/drink product is not a leading factor that influences consumers' choice of food and drink product. It is important for brands to lead with



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features that consumers value (eg convenience, health factors) while promoting sustainability as an added benefit.

Aside from sustainability, it will be key for brands in perishable food categories to assure food quality and safety through enhanced freshness standards. Moreover, communicating value on front of pack will be key, bringing to light Mintel's 2023 Global Food and Drink Trend *Minimal Messaging*.

In this Report, learn how brands can go beyond convenience to enhance value in food packaging for Thai consumers. Understand how brands can rightly communicate sustainability efforts, enhance food safety standards, provide transparency and also develop pack design that will appeal and engage.

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Report Content



EXECUTIVE SUMMARY

- Mintel's perspective

Key issues covered in this Report

- Overview
- The outlook of food packaging in Thailand
- Growing awareness of climate change is driving the importance of sustainable food packaging innovations
- On-pack sustainability claims continue their upward trajectory
 - Graph 1: share of select claims related to packaging in food and drink launches, 2013–23
- Introducing the 'Eco-Wise Consumers': consumers who are actively trying to reduce food packaging waste
 - Graph 2: willingness to pay more for 'eco-friendly packaging' in different food/drink categories, by Eco-Wise Consumers vs total, 2023
- Deliver freshness and quality
 - Graph 3: consumers who find select food packaging feature 'active packaging' appealing when choosing food/drink, by generation and financial situation, 2023
- Introducing the 'Minimalists': affluent Bangkokians who rely on minimal, front-of-pack messages
 - Graph 4: select 'I usually choose a food/drink product based on the information provided on the front of the packaging', by region and financial situation, 2023
- Packaging design influences purchase decisions of younger Bangkokians
 - Graph 5: select 'I tend to choose a food/drink product with attractive packaging design over the others', by generation and region, 2023

KEY TRENDS

- What you need to know

Eco-Awakening: growing awareness about climate change

- Consumers across the globe are concerned about the environment
- Addressing SDGs takes a global village
- Climate change and plastic pollution are issues of importance for Thais
 - Graph 6: environmental/social issues of importance, 2022
- Thailand bans single-use plastic packaging at national parks to protect their ecology
- Thais are embracing the ban imposed on plastic bags
- Thais expect food/drink brands to commit to addressing environmental issues
- Dominant food and drink brands in the Thai market are adopting more eco-friendly packaging solutions and are setting ambitions

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- Label-free bottle packaging is trending globally as brands seek to portray a more eco-friendly recyclable image

Increased focus on quality and transparency

- Mintel Trend: Trading Up
- Health is at the top of Thai consumers' minds
 - Graph 7: top three most important factors considered when choosing packaged food and/or drinks, 2022
- Modern technology employed for food safety
- Mintel Trend: Prove It
- Consumers rely on proof; connected packaging can be used to prove value
- Food packaging will be expected to communicate direct benefits – Minimal Messaging

Technological advancements reshape food packaging functions

- Research focuses on extending shelf life of foods through packaging
- Brands are trying to provide 'Enjoyment Everywhere' through packaging
- AI technology is transforming the potential of food packaging
- The benefits of AI are being felt across the packaging industry

WHAT CONSUMERS WANT AND WHY

- What you need to know

Features of value in food packaging

- Convenience is key in food packaging
- Food and drink brands in Thailand are increasingly building a value proposition around the convenience of their packaging
 - Graph 8: share of product launches in food and drink categories, by select claims, 2020 -23
- Added features of value in packaging of beverages
 - Graph 9: top five features that consumers are willing to pay more for in beverage packaging, 2023
- Added features of value in packaging of ready meals
 - Graph 10: top five features that consumers are willing to pay more for in ready meal packaging, 2023
- Added features of value in packaging of salty snacks
 - Graph 11: top five features consumers are willing to pay more for in packaging of salty snacks, 2023
- Added features of value in packaging of sauces and seasonings
 - Graph 12: top five features consumers are willing to pay more for in packaging of sauces and seasonings, 2023
- Added features of value in packaging of meat/fish
 - Graph 13: top five features consumers are willing to pay more for in packaging of meat/fish, 2023

Packaging sustainability

- Reducing food packaging waste is a matter of priority for Thais
- Introducing the 'Eco-Wise Consumers' – those who are actively trying to reduce food packaging waste

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- Graph 14: consumers who are actively trying to reduce food packaging waste, by generation, monthly household income, education level, 2023
- On-pack sustainability claims continue their upward trajectory
 - Graph 15: share of select claims related to packaging in food and drink launches, 2013-23
- Beverage categories lead the way in making packaging environmentally friendly
 - Graph 16: share of 'environmentally friendly package' claim in total food/drink launches, by category, 2020-23
- Aseptic cartons and aluminum cans stand out for highlighting their sustainability features on pack
 - Graph 17: share of 'environmentally friendly package' claim in total food/drink launches, by package type, 2020-23
 - Graph 18: share of food and drink launches, by pack type, 2020-23
- On-pack claims alone may not effectively drive eco-friendly behaviour
- Eco-Wise Consumers self-engage in sustainable behaviours
- Help consumers minimise their food packaging waste
- Nestlé educates consumers on how to minimise packaging waste
- Nescafé's Superbowl ad focuses on the reusability of its jars
- Create the space for consumers to reuse and refill in order to enhance appeal among Eco-Wise Consumers
- Promote minimal-wastage solutions as an addition to what consumers primarily value: convenience
- Recognise the increasing aversion to plastics among Eco-Wise consumers
 - Graph 19: select 'I have started to choose non-plastic packaging options of food/drink products (eg paper trays, paper bottles)', by Eco-Wise Consumers, 2023
- The challenge: balancing the infamous reputation of plastics with the convenience benefit it provides
- Mintel advises 'responsible use of plastics' as a practical, economical and probable solution
- Call out plastic reduction on front of pack to appeal to Eco-Wise Consumers
- Case study: Indian brand The Whole Truth explains why the use of thermocol is essential for shipping its chocolate bars and encourages reuse
 - Take inspiration in utilising 100% recycled plastics to promote a circular economy
 - The Disposable Company enables brands to go plastic-neutral
 - Promote responsible plastic usage among Eco-Wise Consumers with biodegradable plastics
 - Graph 20: food packaging innovations that will appeal when choosing food/drink product, by Eco-Wise Consumers vs total, 2023
- Leverage the use of paper packaging to communicate eco-friendliness
- Replace flexible plastic with paper to make reduced-plastic claims
- There is a gap in understanding about metal's sustainable value
- Greenery Water educates consumers on the benefits of aluminum packaging

Packaging for food safety and quality

- Food packaging assures food safety and leaves an impression on product quality
 - Graph 21: agreement with statement 'it is important that brands use good food packaging in order to assure the food safety of a product', by monthly household income, 2023

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- Target affluent Gen Xs with packaging that retains freshness, quality and shelf life
 - Graph 22: consumers who find select food packaging feature of 'active packaging' appealing when choosing food/drink products, by generation and financial situation, 2023
- Gen Xs value packaging that preserves freshness in perishable foods
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- Meat/fish: utilise vacuum-packed alternatives to enhance freshness of meat and minimise plastic waste
- Meat/fish: Tyson utilises a range of food packaging solutions to enhance shelf life and quality of meat products
- Meat/fish: Tyson introduces flow-wrap packaging to keep products fresh three times longer, minimise plastic usage and provide convenience
- Ready meals: MATS technology enables Tata Sampann Yumside to extend shelf life without compromising on freshness and quality
- Assure high quality and food safety with smart freshness labels
- Extend freshness using resealable packaging for products that require storing
 - Graph 24: willingness to pay more for 'resealable' packaging across food and drink categories, 2023
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- Use peel-and-reseal packaging to underscore freshness
- Call out the freshness-retention benefits on resealable packs

Optimise on-pack messaging

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 - Graph 25: top three most important factors in food packaging when choosing a food product, 2023
- Minimalists: affluent Bangkokians rely on minimal front-of-pack messages
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- Prioritise health benefits/nutritional information on the front of pack over ingredient information
 - Graph 27: willingness to pay more for select features in food packaging across food/drink categories, 2023
- Simplify packaging to connect with overwhelmed consumers
- Champion essential selling points on front of pack
- Appeal to minimalists with front-of-pack traceable sourcing information
 - Graph 28: select food packaging innovation that would appeal, by consumers who usually choose food/drink product based on information provided on front of package vs total, 2023
- Use blockchain technology to provide product traceability on front of packaging

Win the packaging design game

- Packaging design influences the purchase decisions of younger Bangkokians
 - Graph 29: select 'I tend to choose a food/drink product with attractive packaging design over the others', by generation and region, 2023
- Attractive pack designs will be most valued in indulgent categories such as salty snacks and beverages

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- Graph 30: willingness to pay more for packaging feature 'attractive design (eg colour, texture)' in different food/drink categories, by consumers who tend to choose a food/drink product with attractive pack design over others vs total, 2023
- Drive appeal with ecstatic colours and depict a brand's heritage
 - Graph 31: food packaging innovations that will appeal when choosing food/drink products, 2023
- Connected packaging: tie in the aspect of 'fun' in packaging of indulgent categories with AR
- Intelligent packaging design
- Use AI technology to develop a fun visual appeal for younger consumers
- Brands use colour to convey moods and messages and set expectations
- Bold, bright and impactful

APPENDIX

- Consumer research methodology

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