

# Soft Drinks in Malaysia

December 2024

**Table of Contents** 

## Soft Drinks in Malaysia

## **EXECUTIVE SUMMARY**

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

## MARKET DATA

- Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 10 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 11 Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 12 Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 14 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 15 NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024
- Table 16 LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024
- Table 17 NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 18 LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 19 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 20 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 21 NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024
- Table 22 LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024
- Table 23 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024
- Table 24 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024
- Table 25 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024
- Table 26 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024
- Table 27 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029
- Table 28 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029
- Table 29 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029
- Table 30 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029
- Table 31 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029
- Table 32 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029
- Table 33 Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029
- Table 34 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029
- Table 35 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029
- Table 36 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

## **APPENDIX**

Fountain sales in Malaysia

## DISCLAIMER

## SOURCES

## Summary 1 - Research Sources

## Bottled Water in Malaysia

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Flavoured bottled water gains popularity amid the health and wellness trend as new players enter the fray

New products and distribution developments support the high per capita consumption of bottled water in Malaysia

Strong tourism rebound promises growth opportunities for bottled water

#### PROSPECTS AND OPPORTUNITIES

Water supply disruption ramps-up the demand for bottled water and pressure for eco-friendly packaging solutions to mitigate sustainability issues Population growth, a rising number of households, improving consumer purchasing power and tourists to push the consumption of bottled water Foodservice operators to reduce the offer of complimentary drinking water to stimulate bottled water consumption and profit margins

## **CATEGORY DATA**

- Table 37 Off-trade Sales of Bottled Water by Category: Volume 2019-2024
- Table 38 Off-trade Sales of Bottled Water by Category: Value 2019-2024
- Table 39 Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024
- Table 40 Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024
- Table 41 NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024
- Table 42 LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024
- Table 43 NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024
- Table 44 LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024
- Table 45 Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029
- Table 46 Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029
- Table 47 Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029
- Table 48 Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

## Carbonates in Malaysia

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

On-trade and fountain sales see strong volume growth, while off-trade volume sales drop

Constant new product development is key to success as a shift towards functional offerings is observed

Sustainability gains traction in carbonates

# PROSPECTS AND OPPORTUNITIES

Hike in excise duty for sugary drinks may hinder carbonates, especially in the off-trade channel Tourism and Karaoke bode well for carbonates consumption

Growing appreciation for health-orientated carbonates in Malaysia

# **CATEGORY DATA**

- Table 49 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
- Table 50 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
- Table 51 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
- Table 52 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
- Table 53 Off-trade Sales of Carbonates by Category: Volume 2019-2024
- Table 54 Off-trade Sales of Carbonates by Category: Value 2019-2024
- Table 55 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
- Table 56 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 57 Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

- Table 58 Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024
- Table 59 NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024
- Table 60 LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024
- Table 61 NBO Company Shares of Off-trade Carbonates: % Value 2020-2024
- Table 62 LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024
- Table 63 Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029
- Table 64 Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029
- Table 65 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029
- Table 66 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029
- Table 67 Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029
- Table 68 Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

# Concentrates in Malaysia

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

The rise of alternatives undermines powder concentrates while liquid concentrates maintains momentum Low shelf visibility, low demand and weak new product development limit growth potential in 2024 Brands with strong positioning consolidate their leadership

## PROSPECTS AND OPPORTUNITIES

Brand collaboration is an effective marketing strategy to broaden audience reach

Slowing off-trade (RTD) volume growth is set to prompt a refocus of distribution strategies

Reduced sugar or sugar-free options may see increased visibility and demand in light of the sugar tax

## **CATEGORY DATA**

## **Concentrates Conversions**

- Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format
- Table 69 Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024
- Table 70 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024
- Table 71 Off-trade Sales of Concentrates by Category: Value 2019-2024
- Table 72 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024
- Table 73 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024
- Table 74 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024
- Table 75 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024
- Table 76 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024
- Table 77 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024
- Table 78 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024
- Table 79 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024
- Table 80 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029
- Table 81 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029
- Table 82 Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029
- Table 83 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

## Juice in Malaysia

# **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Marginal volume growth in the off-trade channel amid consumer price-sensitivity and substitution threats Prize contests gain momentum in juice

Key players engage in distribution strategies to expand their reach and engender brand loyalty

#### PROSPECTS AND OPPORTUNITIES

The increase in excise duty on sugary drinks is poised to hike prices of juice Reconstituted 100% juice is set to continue to struggle in off-trade volume terms. The outlook for coconut and other plant waters is optimistic

#### **CATEGORY DATA**

Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

# RTD Coffee in Malaysia

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Greater appreciation of quality and taste in coffee limits RTD coffee's volume growth potential Packaging refreshes, product reformulation and unique marketing campaigns keep consumers engaged Digital marketing is key to consumer engagement and audience reach

# PROSPECTS AND OPPORTUNITIES

New entrants may add dynamism yet saturate the competitive landscape of RTD coffee New product developments to continue to spark excitement among consumers Etika Beverages at the forefront of a focus on convenience distribution and marketing

## CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

## RTD Tea in Malaysia

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

RTD tea enjoys strong volume growth in the on-trade channel amid foodservice and tourism flow recoveries Fresh, limited edition packages and rebranding offer brand refreshes and revitalise consumer interest Innovative collaborations to expand market reach

#### PROSPECTS AND OPPORTUNITIES

Reduced sugar to outpace regular in off- and on-trade volume growth terms in still RTD tea Players to engage in collaborations to boost brand visibility and push purchases Digital marketing and new product development offer essential competitive tools

## **CATEGORY DATA**

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

# Energy Drinks in Malaysia

#### KEY DATA FINDINGS

## 2024 DEVELOPMENTS

New product development and innovation are key competitive tools for energy drinks Strong partnerships reinforce brand positioning and visibility Halal certification to ease doubts among the Muslim-majority population

## PROSPECTS AND OPPORTUNITIES

Urbanisation effects to foster a demand for energy-boosting products Interactive marketing campaigns to create customer engagement and propel demand Players to shift distribution to improve competitiveness

# CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

## Sports Drinks in Malaysia

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

The expanding number of cafés and restaurants attached to fitness centres spur on-trade volume sales Repositioning aims to broaden the use and appeal of 100 Plus "Spend-and-Win" contests and sponsorships remain key strategies

## PROSPECTS AND OPPORTUNITIES

Malaysia's route to becoming a "Sporting Nation" by 2025 offers growth opportunities for sports drinks Collaboration with brand ambassadors increases brand visibility, credibility and engagement Players look to strengthen footholds through distribution strategies

#### **CATEGORY DATA**

Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024

Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

# Asian Speciality Drinks in Malaysia

## **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Off-trade volume sales stagnate but greater penetration boosts on-trade volume sales Price promotions prove an effective strategy to stimulate interest and large purchases Marketing efforts and product innovation are key ways to gain a competitive edge

## PROSPECTS AND OPPORTUNITIES

Players may redirect their focus to other soft drinks or the on-trade channel
Strong collaboration with retailers to secure strategic product placement and higher visibility
Growing interest in healthier beverages presents growth opportunities for Asian speciality drinks

# **CATEGORY DATA**

Table 145 - Off-trade Sales of Asian Speciality Drinks: Volume 2019-2024

Table 146 - Off-trade Sales of Asian Speciality Drinks: Value 2019-2024

Table 147 - Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2019-2024

Table 148 - Off-trade Sales of Asian Speciality Drinks: % Value Growth 2019-2024

Table 149 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2024

Table 150 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2021-2024

Table 151 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2020-2024

Table 152 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2021-2024

Table 153 - Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2024-2029

Table 154 - Forecast Off-trade Sales of Asian Speciality Drinks: Value 2024-2029

Table 155 - Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2024-2029

Table 156 - Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2024-2029

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/soft-drinks-in-malaysia/report.