

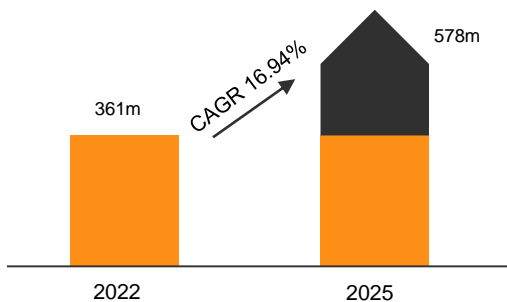


MARKET TRENDS IN VIETNAM:
BEVERAGES



KEY TRENDS

Vietnam Beverages Market (US\$)



+ IN-SCOPE

- Alcoholic drinks (e.g., beer, wine, spirits)
- Hot drinks (tea, coffee, cocoa)
- Non-alcoholic drinks (e.g., soft drinks, juices, mineral water)

- ▶ The number of users are expected to amount to 18.8m users by 2025.
- ▶ User penetration will be 14.6% in 2022 and is expected to hit 18.6% by 2025.
- ▶ The average revenue per user (ARPU) is expected to amount to US\$25.01.



PROSPECTS AND OPPORTUNITIES



LESS INTERESTED IN SUGARY BEVERAGES



One important trend that has emerged from the pandemic is the stronger focus on health and wellness among many consumers.

At the same time, consumers are becoming less interested in sugary beverages, with such drinks having been linked to a variety of lifestyle diseases, notably type II diabetes, heart disease and metabolic syndrome.



International players hold stronger position than local rivals.

With competition between Coca-Cola and PepsiCo in reduced sugar carbonates set to remain intense, their strong positions are likely to continue discouraging local companies from entering this category.



Coca Cola Zero Sugar

- Product of Vietnam

Ingredients: Carbonated Water, Caramel Colour, Phosphoric Acid, Aspartame, Potassium Benzoate (to protect taste), Natural Flavours, Potassium Citrate, Acesulfame Potassium, Caffeine.

LESS INTERESTED IN SUGARY BEVERAGES



NILO Soursop Juice No Sugar Added

- The best-tasting soursop with NO sugar added, all 100% natural.
- Not from concentrate, made from fresh soursop and with real soursop pulps.
- Product of USA.

Ingredients: Water, Soursop Juice with Pulp, [Stevia](#), [Citric Acid](#), [Ascorbic Acid](#), Natural Identical Soursop Flavour.

FORTIFIED/FUNCTIONAL BEVERAGE WITH VITAMIN C & MINERALS



The pandemic has seen demand for fortified/functional beverages supported by consumers looking to boost the functioning of their immune systems through the consumption of fortified/functional soft drinks, energy drinks and sports drinks.

During the pandemic, many consumers have looked into increasing their consumption of vitamin C and minerals that are believed to enhance their immune systems.



Suntory C.C. Lemon

- Refresh and revive with Suntory C.C. Lemon soda. This can contains 350ml of lemon flavoured carbonated soft drink which contains real lemon juice and proudly boasts to contain 35 lemons' worth of vitamin C. A fantastic summertime cool-down, as well as a great revitaliser at any time of the year.
- Product of Japan

Ingredients: Isoglucose, Sugar, Lemon Juice, Flavouring, **Vitamin C**, **Acidifier**, **Calcium Pantothenate**, **Vitamin B6**, Carotene Colouring.

FORTIFIED/FUNCTIONAL BEVERAGE WITH VITAMIN C & MINERALS



Nawon Orange Juice Drink with pulp

- It's naturally high in vital nutrients such as vitamin C and potassium and enriched with calcium and vitamin D.
- Product of Vietnam.

BEER REMAINS TO BE A POPULAR DRINK



Beer is one of the cheaper alcoholic drinks options, which makes it available to all income groups.

As a result, this is expected to remain a lucrative category for both local and international players, and key players are projected to be active in terms of promotional and marketing activities to stimulate consumer demand and boost sales.

The country's low median age will contribute to growth.

Per capita consumption of beer amongst young adults of legal drinking age is higher than amongst middle-aged adults and the elderly, who consume less alcohol due to health reasons and reduced social occasions.



Hanoi Premium – Lon Sleek

- Hanoi Premium is the perfect combination of the selection of premium ingredients imported from Europe and Australia with the secret of long-term fermentation to achieve a harmony and balance in the aroma of hops and aftertaste. characteristic purity of the seductive lager.
- Product of Vietnam.

BEER REMAINS TO BE A POPULAR DRINK



Tiger Lager Beer

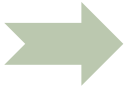
- A pale lager beer internationally renowned for taste and quality.
- Clean, refreshing and full-bodied premium lager beer with no lingering aftertaste.
- Comes with a light straw colour, soft beady aroma and a hint of tropical fruit.
- Product of Singapore.

Ingredients: Water, Malted Barley, Glucose Syrup, Hop Extract.

RTD MALT-BASED DRINK



In 2020 and 2021, malt-based hot drink has registered a positive performance as a result of COVID-19. During the review period, malt-based hot drink constantly lost sales to the RTD format, due to the latter offering greater convenience.



The RTD variants, which are better suited to immediate and on-the-go consumption.

As lifestyles become busier again following the loosening of restrictions in a post-pandemic landscape, convenience will become a key selling point and will thus boost demand in RTD drinks, both in this category and others.



Rita Malt Drink

- Available in 4 flavours: Pure Powerful, Coffee, Vanilla and Cocktail.
- Product of Vietnam.

RTD MALT-BASED DRINK



Milo Chocolate Ready To Drink

- Drinking MILO malt energy drink as part of a balanced snack helps your kids to get the best out of their day.
- MILO nutritional energy drink contains a combination of 6 vitamins and minerals which help release energy from your food.
- Being physically active is important for your child's growth and development. MILO energy drink helps fuel their active lifestyle.
- Product of Vietnam.

Ingredients: Nonfat Milk, Water, Barley Malt Extract, Sugar, Cocoa Processed With Alkali, Palm Oil, And Less Than 2% Of Carrageenan, **Mono & Diglycerides**, Soy Lecithin, **Calcium Phosphate**, **Sodium Phosphate**, **Magnesium Carbonate**, **Ascorbic Acid (Vitamin C)**, Artificial Flavours, **Ferric Pyrophosphate (Iron)**, **Niacinamide (Vitamin B3)**, **Calcium Pantothenate (Vitamin B5)**, **Pyridoxine Hydrochloride (Vitamin B6)**, **Thiamine Mononitrate (Vitamin B1)**, **Riboflavin (Vitamin B2)**, **Biotin**, **Cyanocobalamin (Vitamin B12)**.

COCONUT AND OTHER PLANT WATERS

Coconut and other plant waters are believed to be particularly good for health and wellbeing, with coconut water containing various nutrients and vitamins, including antioxidant properties.

Coconut and other plant waters continue to show the strongest volume growth in 2021, as sales maintain their trajectory from a low base.

- ▶ Consumers are attracted to the novelty of this category, as well as its strong health and wellness profile.



Coconut and other plant waters are expected to maintain its robust growth over the forecast period, driven by the immaturity of the category and its trajectory from a low base.



Zico 100% Coconut Water Drink

- 100% coconut water, not from concentrate and no sugar added (not a reduced calorie food. See nutrition facts for sugar and calorie content). When you crack open a delicious Zico, your body will thank you.
- Product of USA.

Ingredient: Coconut Water.

COCONUT AND OTHER PLANT WATERS



True Nopal Organic Cactus Water

- Low Calories.
- Low sugar.
- Antioxidants.
- Magnesium.
- Potassium.
- Refreshing & Delicious.
- Product of USA.

Ingredients: Filtered Water, Organic Prickly Pear Concentrate, Organic Lime Concentrate, Natural Flavour, Natural Vegetable Colour.

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THANK YOU