



136% rise in convenience beverages, 140% in juices

ATUL AMRUTKAR

There's not a man, woman or child on the face of the earth who does not enjoy a tasty beverage

- David Letterman,
American television host, comedian,
writer and producer

Beverages can be alcoholic or non-alcoholic. Beer, ready-to-drinks (RTDs)/high-strength premixes, spirits, wine and cider or perry are major categories under the alcoholic beverages segment. Bottled water, soft drinks, dairy drinks and hot beverages fall under the non-alcoholic category.

As Asia's middle-class population grows, opportunities await local and global beverage manufacturers. By 2030, it is forecast that Asia would account for two-thirds of the global middle-class population. The continent would account for nearly 60% of the world's middle-class consumption, with more than two-thirds coming from India and China.

More health-conscious

Asian consumers are gradually becoming more health conscious and considering products that suit their preference for a healthier, more active lifestyle: 42%¹ rise in overall functional beverages, 48%¹ rise in sports and energy drinks with functional claims and 114%¹ rise in functional beverages concentrates and mixes.

Consumers changing and hectic lifestyles increased the popularity of convenience beverages: 42%¹ rise in overall functional beverages, 125%¹ rise in convenience sports and energy drinks, 136%¹ rise in convenience beverages and concentrate mixes with functional claims and 140%¹ rise in conventional juices.

Demand for clean labels of ingredients/preservatives and additives is increasing in Asia: 7%¹ rise in overall clean label and organic beverage, 16%¹ rise in carbonated soft drinks with a clean label and organic claim.

Growth in alcohol consumption in Asia is driven



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by increased consumer spending power and rising tourism in key Asian countries such as India, Singa-

pore, Malaysia, Thailand, Indonesia and China. Economic growth in the region, coupled with market openness, air connectivity and travel simplification, increased inbound and outbound travel. Asia accounts for a 33% share in the global tourism market. The carbonate and sports

drink market's growth is driven by products that are sugar free. For example, the introduction of new carbonate alternatives such as Coca-Cola Zero Sugar and Coca-Cola Stevia in Malaysia helped address consumers' apprehension over sugar while keeping a similar taste. In

addition, consumption of sports drinks is set to rise, particularly with their growing availability in foodservice channels.

Bottled water consumption has sustained its strong growth in Asia. Health-conscious consumers demand hydration.

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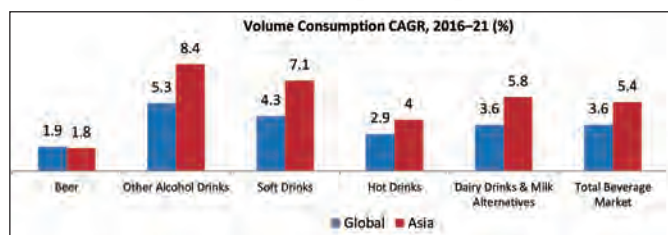


Asian beverages market may expand at 5.4% CAGR during 2016-21

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To capitalise on this momentum, manufacturers are focussing their efforts on launching new products with hydration benefits. They have concentrated their efforts on introducing new products with hydration benefits. For example, Gatorade G-Active is available in various flavours and does not contain sugar.

Asia's coffee market is thriving, as traditional tea consumers are turning towards coffee. The number of new coffee product launches rose 95% between 2011 and 2016. For the same period, new tea product launches stood at 55%. Many Asian countries are moving from the first wave (growth in coffee consumption)



Effects between Q2 2017 and Q2 2018

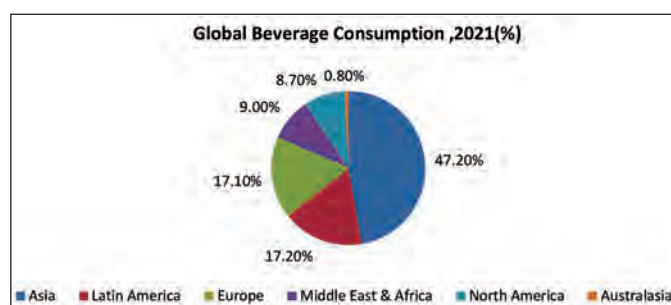
to the second wave (enjoyment of speciality coffee), while few countries such as Japan, South Korea, Indonesia and Singapore are moving to the third wave (purchasing coffee based on its origin and artisan methods of production).

Asia has highest growth in demand for dairy products in the world. Demand for milk/milk products in Asia is

estimated to reach 320 million tonne by 2021. The rise in demand for dairy products is attributed to growing population, an emerging middle-class consumer, urbanisation and rising need for health and wellness solutions in Asian countries.

Outlook

The Asian beverages market is expected to expand at a CAGR



Soft drinks include packaged water, carbonates, flavoured water, juices, tea and coffee drinks. Daily drinks and milk alternatives comprise white milk, flavoured milk, yoghurt and condensed milk. Hot drinks include tea and coffee. Other alcoholic drinks include wine, spirit and cider.

of 5.4% during 2016-21. The factors driving the Asian beverages market's growth are a rapidly increasing middle-class population, growing disposable incomes, inclination towards a healthier lifestyle and a rising tourism market.

27 March 2018 - Asia-Pacific Food Industry, The Performance And Prospects Of The Drink Market In Southeast Asia

Q2 2018 - The Singapore Wine Vault, Southeast Asia's Growing Wine Industry: Q2 Trends and Highlights

2 April 2018 - Kerry Group, Trending 2018: Food and Beverage in Asia

Q2 2018 - Food Ingredients Asia, Key drivers in the Asian beverages market

Reference

13 June 2016 -Economic Times, Soft drinks, packaged water to drive beverage consumption growth 20 September 2017 - Asia-Pacific Food Industry, Looking At Asia And The Dairy Industry

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Change in law for permissible limit

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Starches are used as active ingredient in noodle dough and also part of spice mix in instant noodles. The instant noodles market is matured and consolidated; hence usage of starches is likely to grow significantly in the future.

In RTE/RTC meals, starches are used as thickeners and in top coatings to get golden brown and

crispy deep fried products.

The high dosage of starch in masala is also a non-negligible contributor in demand.

The key limitation for using modified starches in food products is its higher price when compared to low-priced native starches.

Modified starch accounts for almost 13% of total starch

demand in food applications and market is expected to grow at the rate of 1% during

Table 1: Top Native Starch Manufacturers, India

Starch Manufacturing Company
Roquette Riddhi Siddhi
Gujarat Ambuja
Sukhjit Starch and Chemicals
Universal Starch
Sanstar Bio-polymers
Sahyadri Starch & Industries
Vijaya Nagar Biotech
SPAC Starch Product (India)
Paramesu Biotech
Maize Products

the forecast period 2017-22; mainly due to the change in legislation for permissible limit and because of the growing food industry in India.

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