



SRP



Emerging Trends in Asia's Sustainable Rice Consumption

Thailand Edition - August 2023



THAILAND

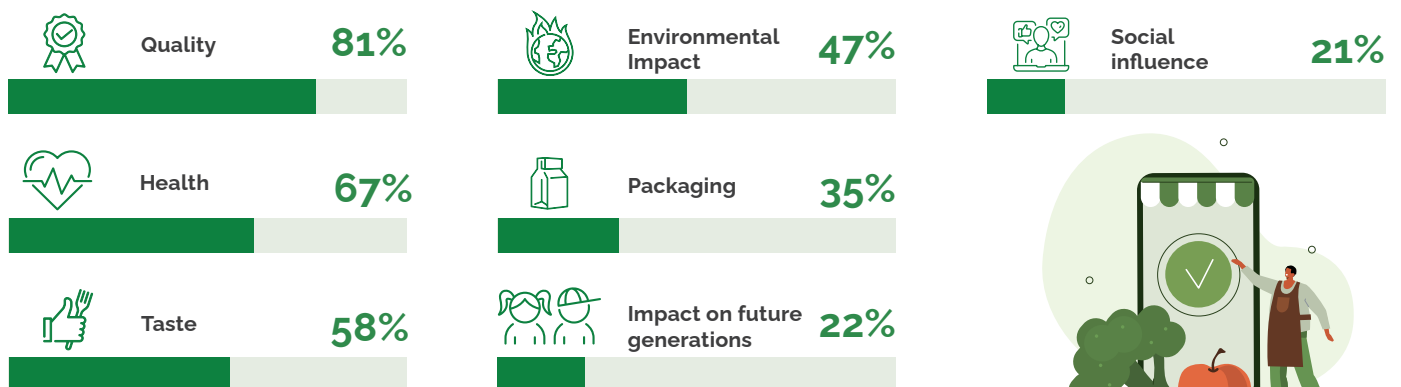
It is clear from the results that Thai people love rice, with 100% of respondents claiming to eat rice five times a week or more. The most popular types are Jasmine rice (84%) and glutinous rice (33%), which is consumed mostly across all regions.

Most respondents purchase rice from hypermarkets (50%) and local markets (43%), followed by supermarkets and groceries (31%). Interestingly, younger people aged 18-24 make up 51% of those who purchase from local markets, which is usually patroned by older buyers. The average purchase price of rice is between 100-300 Baht (THB) (EUR 2.57 - 7.72), which is on the lower end of the range, and 72% of consumers buy more than 4 kg in a single purchase.

Quality, health and taste are the top three reasons for buying sustainable food products

Those who have previously bought sustainable foods (72%) tend to be younger (82% are aged 18-24 years old) and from higher-income households (77%). Quality is the main factor that influences their purchases, health comes in second and tends to

have a greater impact on older consumers. Taste ranks third as a factor driving purchase decisions, mattering more among younger consumers with 69% between the ages of 18 and 24 prioritizing this.

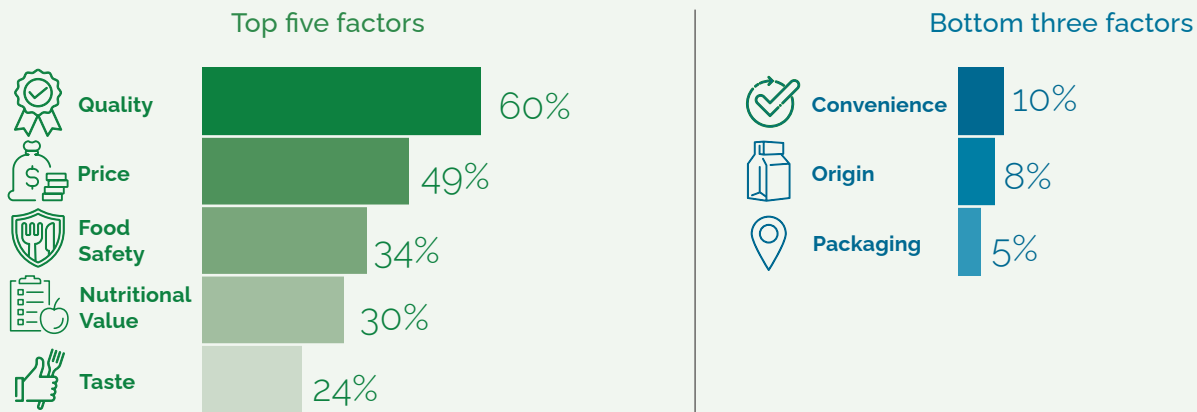


Quality is the top reason for buying rice, price and nutrition are important to younger consumers too

When it comes to rice, we see similar sentiments being reinforced. Quality comes out on top again followed by price and food safety. Younger consumers between 18-24 years of age (59%) are more price sensitive and would justify their rice purchase with the nutritional value they are getting in return (46%).



Most/least important factors when purchasing rice



Social media, retail touchpoints and packaging are the main information mediums for rice

Overall, social media is the main channel consumers use to get information about both rice as a product (53%) and sustainable rice (64%). While consumers that obtain their information from retail

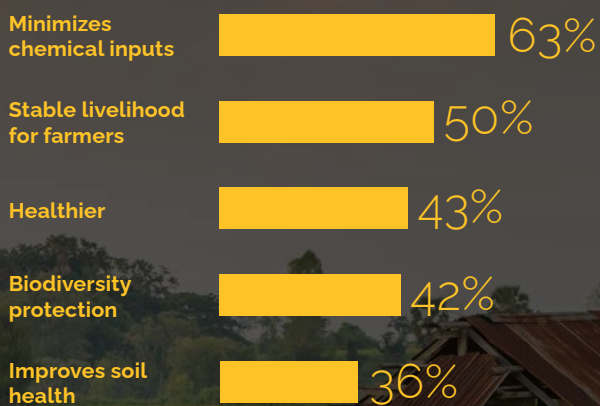
packaging (42%) tend to be older aged above 55 making up 60% of those who chose this. When it comes to sustainable rice, television (35%) and in-store touchpoints (31%) round out the top three.

Quality, health and taste are the key reasons for purchase, diverging slightly from key attributes associated with sustainable rice

While minimizing chemical inputs and health make it into the top five as both key characteristics and purchase factors of sustainable rice, consumers focus more on product-related attributes (taste and sustainable certification) when it comes to consumption. We also

see older consumers forming a majority of those who value minimal chemical usage in rice (organic quality), with those aged 45-54 forming 50%, and those aged above 55 forming 69% of total respondents.

Key attributes of sustainable rice (as perceived by Thai consumers)



Key factors behind purchase of sustainable rice (Thai consumers)



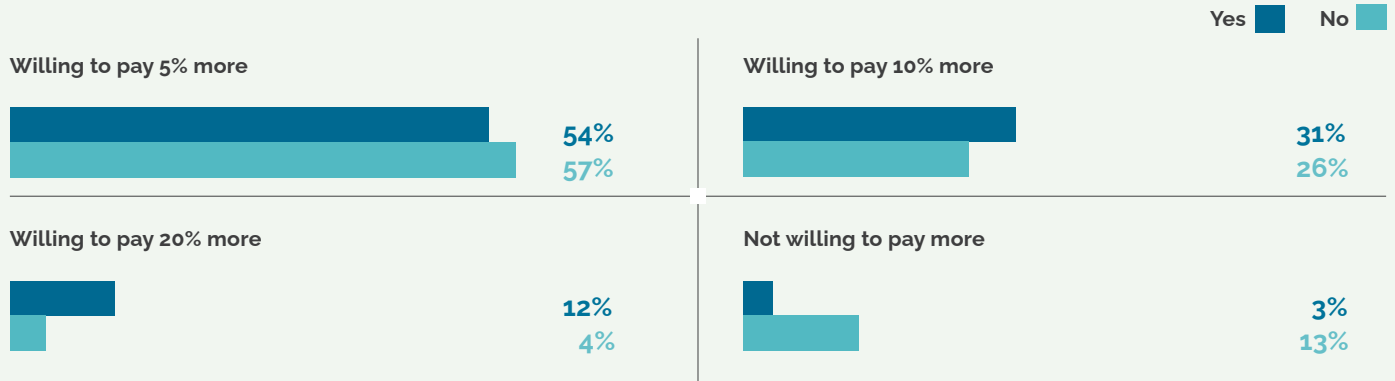
Premium for sustainable rice capped at 10% for most consumers

While Thai consumers are willing to pay extra for sustainable rice, the acceptable price premium is reported to be between 5–10% for 84% of respondents.

More Northeastern buyers have previously bought sustainable rice (58%), compared to an average of 46%.

Out of those who have previously bought sustainable rice, only 3% of total respondents reject paying more, with a majority (97%) willing to pay up to 20% more. Even many who are new to sustainable rice, displayed willingness to pay a premium with 83% willing to pay up to a 10% increase in prices.

Ever purchased sustainable rice



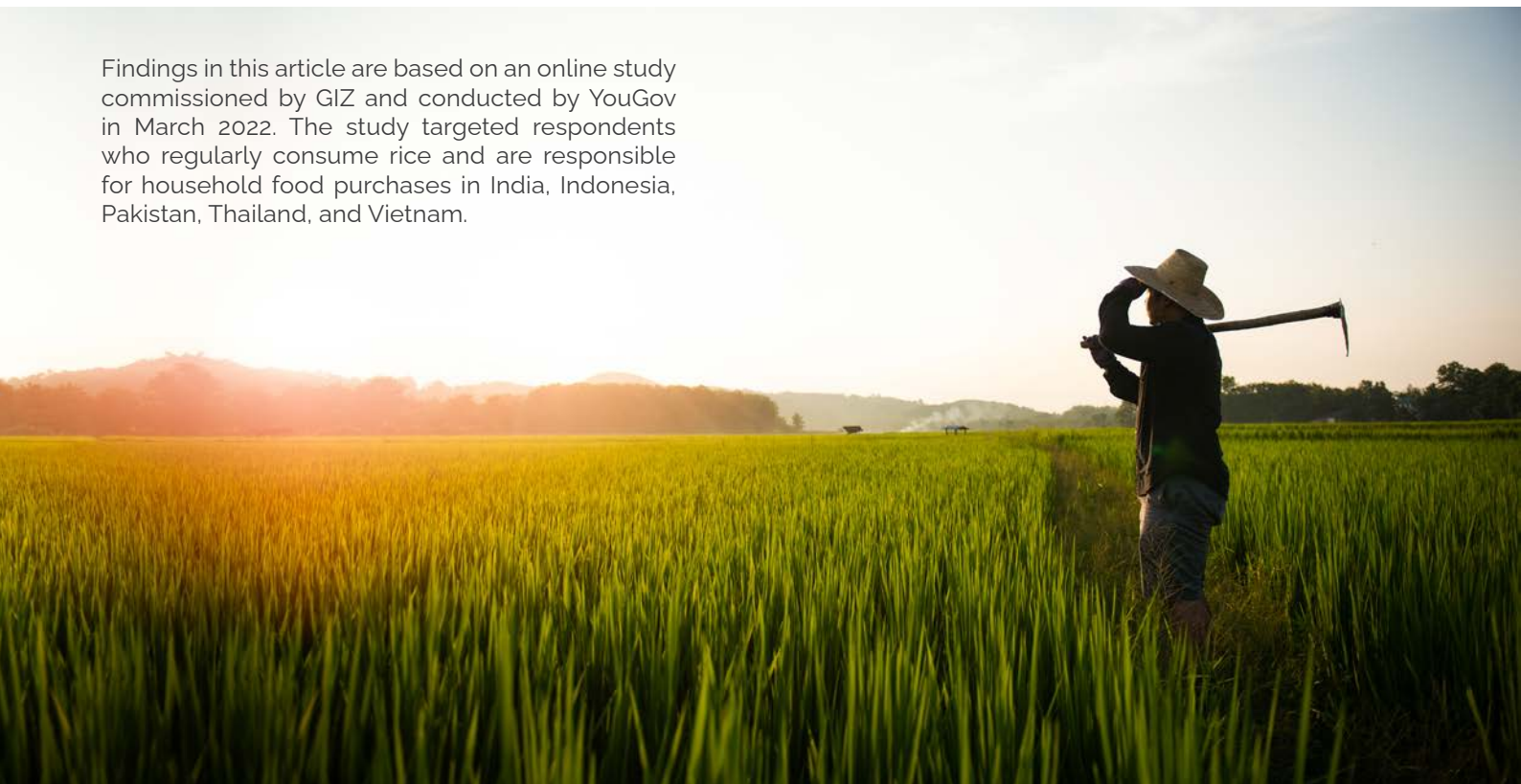
Potential buyers of sustainable rice are likely to be well-educated, employed, social-media savvy millennials

Target consumers of sustainable rice are likely to be well educated younger consumers between 18-34 years old (49%), with a bachelor's degree or above (93%). They value high quality (81%), healthy (67%) and tasty (58%) products. They also tend to have higher incomes (94%) and hold full-time jobs (73%). As with Indonesian consumers, they tend to be on TikTok

(62%) which is proving to be an important platform for future marketing efforts.

As many Thai consumers are relatively price inelastic, we would recommend that SRP-branded rice cost no more than 300 THB (EUR 7.72) in a single purchase of 3-4 kg.

Findings in this article are based on an online study commissioned by GIZ and conducted by YouGov in March 2022. The study targeted respondents who regularly consume rice and are responsible for household food purchases in India, Indonesia, Pakistan, Thailand, and Vietnam.





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