United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** September 01, 2026

Report Number: TH2026-0031

Report Name: Whey to Go - Riding the High-Protein Milk Wave with US Ingredients

Country: Thailand

Post: Bangkok

Report Category: Beverages, Dairy and Products

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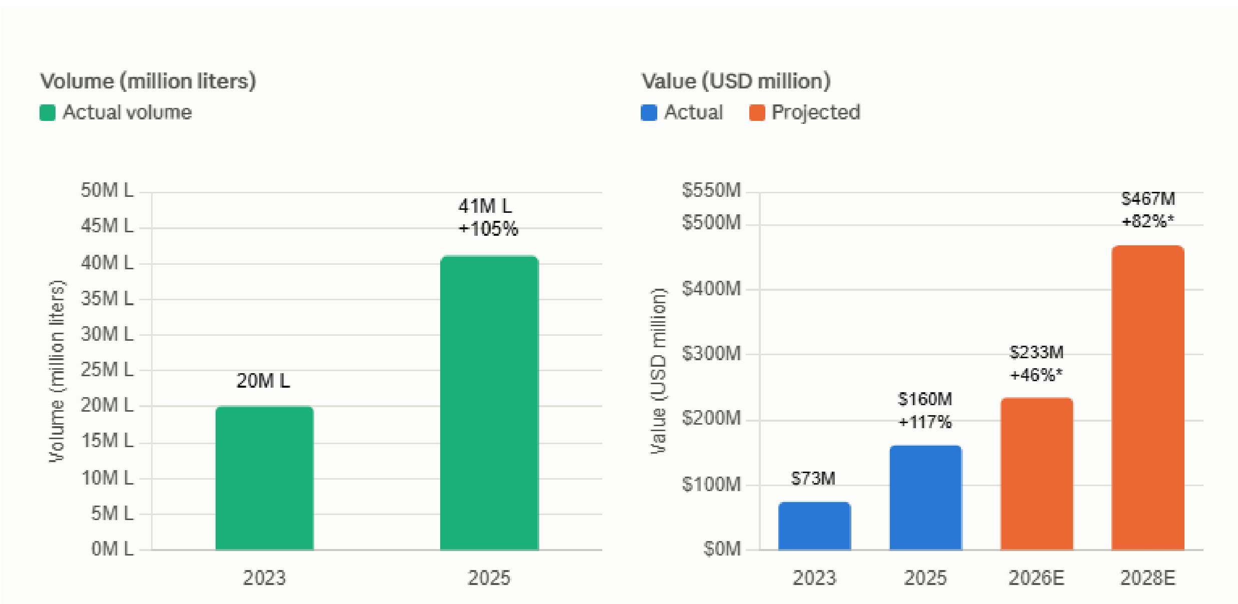
Report Highlights:

Thailand's high-protein milk market is booming and U.S. whey exporters stand to benefit. The ready-to-drink (RTD) high-protein segment grew 117 percent in just two years, from $73.4 million (20 million liters) in 2023 to $159.5 million (41 million liters) in 2025. Once a niche product for bodybuilders, high-protein milk has become a mainstream daily habit among urban Thai consumers, fueled by an aging population, rising health consciousness, and rapid urbanization. This makes it one of the fastest-growing segments in Thailand's food and beverage sector.

I. Thailand's High-Protein Milk Market (2023-2026)

According to Nielsen Thailand data, Thailand's ready-to-drink (RTD) high-protein market more than doubled between 2023 and 2025, growing from $73.4 million (20 million liters) to $159.5 million (41 million liters). This surge stands out sharply against the broader dairy sector, where traditional standard dairy products lost 9 percent in value while functional and value-added products gained 27 percent, with high-protein RTD products leading the way through consecutive years of growth exceeding 100 percent annually. The segment is expected to reach between $210.7 million and $255.9 million in value by 2026, yet it still makes up just 4 percent of Thailand's total 1.057-billion-liter dairy and plant-based beverage market, a clear sign that the market remains in its early growth phase. If penetration reaches even modest single-digit levels, this segment could exceed $450 million by 2028, pointing to significant room for continued expansion in the years ahead.

Figure 1. Thailand: RTD High-Protein Milk Market: Value (USD) and Volume Growth, 2023–2028



II. Market Dynamics and Growth Drivers

The rapid transformation of Thailand's functional beverage landscape stems from two powerful, complementary consumer movements driving adoption in major urban hubs such as Bangkok, Chiang Mai, and Phuket.

The first catalyst is a fundamental shift toward Mindful Wellness. According to PwC's Voice of the Consumer Survey 2025, more than 84 percent of Thai consumers now actively prioritize their personal health, and high-protein drinks have shed their legacy reputation as niche, powdery supplements reserved for bodybuilders and intense gym workouts. Today's consumers view protein as a daily essential that boosts immune strength, supports weight management, and sustains clean energy throughout long workdays. This wellness focus is accompanied by real purchasing power, as 88 percent of Thai shoppers report a willingness to pay premium prices for beverages that offer verified functional health benefits.

Working alongside wellness priorities is the demand for Hyper Convenience, driven by the fast pace of life in metropolitan centers. Urban Thai consumers are increasingly moving away from traditional scoop-and-shake protein powders in favor of ready-to-drink options that require no preparation. Grabbing a cold, pre-mixed high-protein bottle on the way to the office or immediately following a morning run offers an effortless, high-value alternative that fits seamlessly into fast-paced daily routines.

Table 1. Thailand: Expanding High-Protein Milk Consumer Base

Consumer Segment	Primary Use Case
Office workers/professionals	Quick meal replacement; swapping heavy breakfasts for protein-dense options
Fitness enthusiasts (running clubs, boutique gyms, HYROX athletes)	Post-workout recovery
Women	Weight management and appetite control
Active seniors	Maintaining muscle mass; countering sarcopenia (age-related muscle loss)

III. Brand Landscape & Competitive Benchmarking

High-protein RTD milk has moved from a niche offering in premium retailers (Gourmet Market, Villa Market, Tops, Rimping) into the mainstream, now stocked in convenience chains like 7-Eleven and Lotus's Go Fresh. Products typically deliver 20-30+ grams (g) of protein per serving, reflecting fierce competition among dairy giants, plant-based innovators, and health-focused startups.

The **dairy-based segment** dominates 74 percent of market volume. CP-Meiji leads with its lactose-free Meiji High Protein Whey Formula, popular among urban professionals and gym-goers. Dutch Mill's Whey Plus targets mass retail with localized flavors and up to 30g of imported whey protein. Foremost continues expanding functional milk lines for active families, while Hooray!, the category pioneer, built early loyalty in Bangkok's fitness community with lactose-free blends reaching 31g of protein. Regional and niche players are also carving out space: Chiangmai Fresh Milk leans on farm-to-bottle sourcing, Sunshine Dairy pushes protein content to 33g with added branched-chain amino acids (BCAAs), and Proten targets gym-goers through mainstream retail.

Figure 2. Thailand: High Protein Milk section in a typical 7-11 convenience store

The **plant-based segment** holds 26 percent of the market (roughly 10 million liters). Tofusan leads with non-GMO organic soy milk (24-28g protein), Lactasoy's Benefitt offers 31g in a shelf-stable ultra-high temperature (UHT) format, and 137 Degrees targets upscale shoppers with pea-protein almond and pistachio blends.

Table 2. Thailand: Select High Protein Milk Brands

Brand	Segment	Flagship Product	Protein/Serving	Positioning
CP-Meiji	Dairy	Meiji High Protein Whey	Not specified	Lactose-free; urban professionals, gym-goers
Dutch Mill	Dairy	Whey Plus	Up to 30g	Mass retail; localized flavors
Foremost	Dairy	High-protein/functional milk	Not specified	Active families, working adults
Hooray!	Dairy	Lactose-free high-protein milk/yogurt	Up to 31g	Fitness community; recovery/meal replacement
Chiangmai Fresh Milk	Dairy	Lanna High-Quality Milk	Not specified	Farm-to-bottle, regional/local origin
Sunshine Dairy	Dairy	Lactose-free high-protein line	Up to 33g	Added BCAAs/vitamins
Proten	Dairy	Hokkaido Milk, Thai Tea, Chocolate	Not specified	Gym-goers, mainstream retail
Tofusan	Plant-based	Organic Soy Milk	24-28g	Clean-label, dairy-free
Lactasoy (Benefitt)	Plant-based	Benefitt UHT	31g	Shelf-stable, no cold chain
137 Degrees	Plant-based	Almond/pistachio milk	Not specified	Upscale (Villa Market, Tops Central Food Hall)

IV. High-Protein Ingredient Import Landscape & Global Origin Competition

This rapid market expansion depends heavily on imported functional dairy and specialty protein ingredients. Overall Thai food processing ingredient imports reached $3.7 billion in 2025, marking an 8 percent year-over-year increase. Within this broader category, dairy proteins, particularly whey protein isolate (WPI), whey protein concentrate (WPC), and milk protein concentrate (MPC), serve as the foundational inputs driving this growth.

Thailand's total milk protein ingredient market reached $235.58 million in 2025 and is projected to expand to $447.45 million by 2035 according to Market Research Future’s Thailand Milk Protein Market Industry Report, reflecting a compound annual growth rate of 6.63 percent.

WPI is the largest sub-segment by value, growing 35.33 percent from $27 million in 2024 to $36.53 million in 2025. This growth is driven by manufacturer demand for highly soluble, ultra-filtered, low-lactose formulations that align with Asian consumer preferences. The United States is the leading exporter to Thailand, supplying approximately $22.28 million which representing roughly 60 percent of Thailand's WPI import market.

Global ingredient exporters supplying Thailand's RTD beverage sector compete across four main agricultural regions, each bringing distinct competitive advantages to the market. The United States remains the leading country of origin for WPI entering Thailand, with major U.S. suppliers offering ingredients known for high solubility, neutral flavor profiles, and reliable heat stability under UHT processing conditions. The U.S. market position is further reinforced by competitive pricing and dedicated regional application support through the U.S. Dairy Export Council's (USDEC) Center for Dairy Excellence in Singapore.

Table 3. Thailand: High Protein Milk Competitive Landscape by Region of Origin

Region	Competitive Strengths	Competitive Challenges
United States	High solubility, neutral flavor, heat stability under UHT processing; competitive pricing; USDEC application support via Singapore Center for Dairy Excellence	Subject to standard 5–10% non-FTA import tariffs
Europe	Premium quality; specialized MPCs; established processor relationships	Higher price points than U.S.
Australia/New Zealand	Clean-label, pasture-fed positioning; zero-tariff FTA access	Longer logistics lead times; recent price increases
Emerging Exporters	Price-competitive in bulk WPC 80 and skim milk powder	Premium Thai brands still favor Western origins for quality/flavor consistency

European exporters maintain a strong presence grounded in a reputation for premium-quality dairy inputs and specialized MPC. These suppliers benefit from well-established relationships with regional processors, though they currently face higher price points relative to their U.S. counterparts.

Suppliers from Australasia compete on clean-label, pasture-fed brand positioning alongside deep regional trade roots. Exporters from Australia and New Zealand also hold a duty advantage through zero-tariff trade agreements, compared to the standard 5 to 10 percent non-FTA import tariffs applied to U.S. dairy ingredients. This tariff benefit, however, is frequently offset by longer logistics lead times and recent price adjustments.

Emerging exporters compete primarily on price within lower-tier bulk WPC and skim milk powder segments. While attractive for cost-sensitive applications, premium Thai RTD beverage brands continue to favor Western origins to maintain brand positioning, consistent quality, and superior flavor neutrality.

V. Opportunities for U.S. Protein Ingredient Exporters

The expanding high-protein landscape in Thailand presents a major commercial opportunity for U.S. ingredient suppliers, backed by a strong trade foundation. The United States maintains a favorable competitive position as a leading origin for WPI imports. U.S. exporters benefit from significant supply capacity and competitive pricing, providing a robust platform to supply functional dairy and plant-based protein ingredients tailored to local manufacturing needs.

The U.S. holds a strong, defensible position as Thailand's leading WPI supplier, backed by scale, pricing, and technical performance advantages.

U.S. dairy-based ingredients have exceptional heat stability under UHT processing and a neutral flavor profile that minimizes off-notes.

Table 4. Thailand: U.S. Ingredient Advantages in Dairy Segment

U.S. Ingredient	Best Application	Key Advantage
Whey Protein Concentrate (WPC 80)	Mass-market high-protein beverages	Cost-effective base ingredient
Whey Protein Isolate (WPI 90%+)	Ultra-premium, lactose-free formulations	Critical given high lactose intolerance rates in Southeast Asia
Milk Protein Concentrate/Isolate (MPC/MPI)	Meal-replacement drinks, protein puddings, drinking yogurts	Slower-digesting profile enhances viscosity and satiety

Parallel opportunities exist within Thailand's 10-million-liter plant-based market, where U.S. Soy Protein Isolate provides high solubility and a clean taste profile for alternative dairy lines. This can be complemented by California almonds and pulse proteins, such as pea and chickpea isolates, to support clean-label, multi-source plant protein blends.

Recommended Strategy

U.S. exporters should pair ingredient functionality with **localized flavor adaptation** — incorporating regionally popular profiles such as Thai Milk Tea, Coconut, Brown Sugar Boba, and Matcha — to give Thai beverage manufacturers ready-to-launch, commercially viable product concepts that accelerate adoption.

Attachments:

Thailand RTD High Protein Drinks Comparison.xlsx