Pulse of the Impulse – Unwrapping APAC Snacking Momentum

April 2026

NIQ NielsenIQ

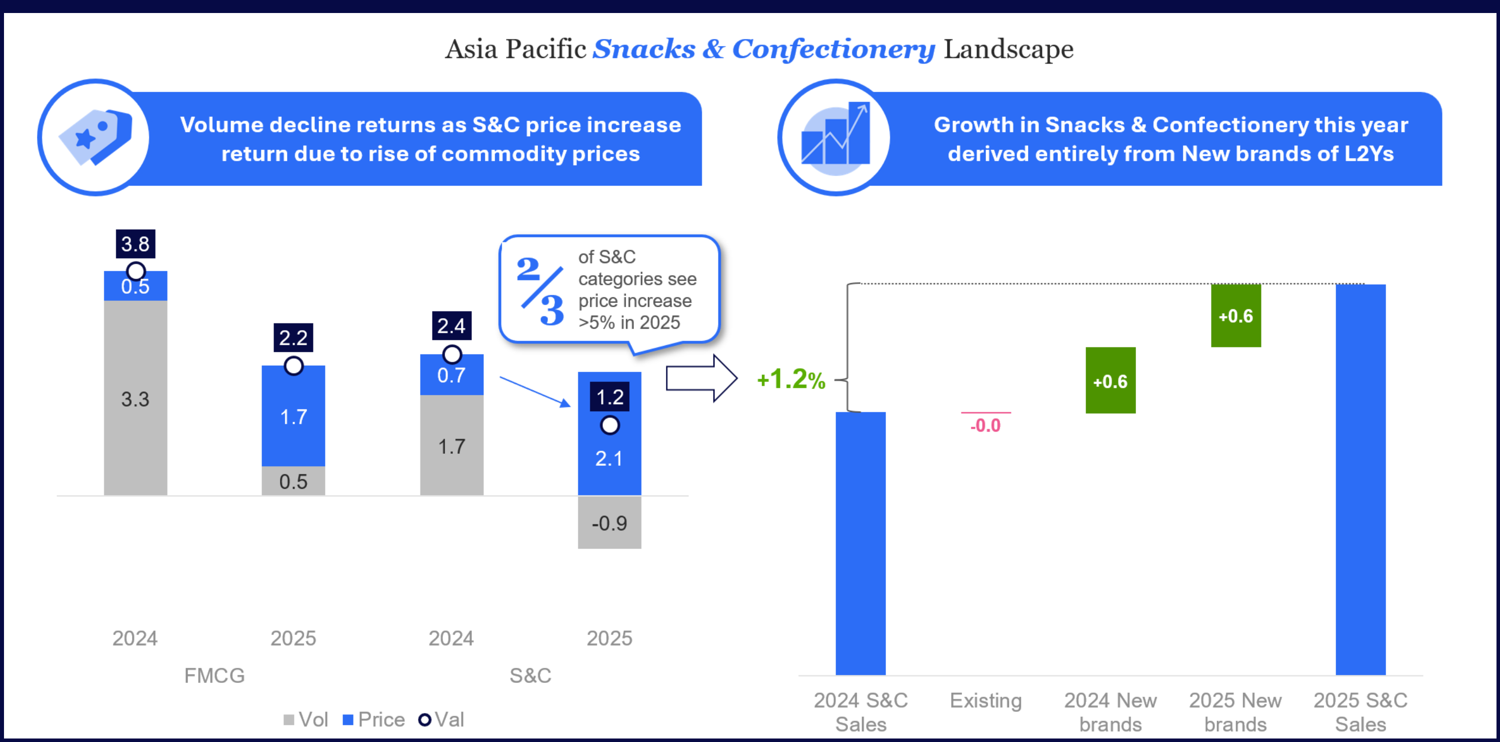
Snacks & Confectionery is dependent on innovations for growth

73 Billion $ in Sales

51 Thousand Brands

29 New brands launched/day

S&C Growth lost momentum in 2025, in line with FMCG performance, as high commodity costs forced manufacturers to lean heavily on price-led growth. Notably, ALL of the industry's 1.2% growth came from insurgent brands —half from brands launched in 2025, and the rest from launches introduced in 2024.



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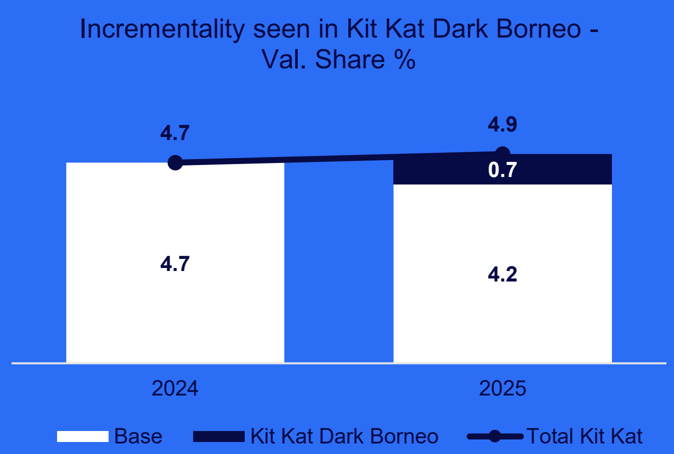
Right Taste, Right Place

34% of consumers claim Taste & Enjoyment matters most when choosing a snack

Emerging Flavor Wave: The East-to-East Shift

A powerful new trend is reshaping flavor innovation across Asia — and it's no longer West-to-East. Instead, bold regional favorites are travelling across Asia at record speed



Local Flavors, Big Impact: When Taste Becomes National Pride

When brands stop borrowing flavors and start celebrating local identity, consumers reward them with loyalty… and demand

Texture Reinvented: When One Bite Delivers More Than One Sensation

The biggest wins in snacking come from unexpected texture pairings — crispy meets creamy, chewy meets juicy — transforming ordinary bites into richer, more memorable experiences

From Viral Spark to Scaled Success

Snacks are now discovered online, socially, and through peers, often before shoppers see them in store. With faster innovation cycles and quicker copycats, discovery has become as important as product quality.

38%

of APAC consumers order FMCG products from ***pure players*** *(e.g. Amazon, Shoppee, Lazada)* for home delivery

10%

of Snacks & Confectionery sales are sourced from ***Online platforms*** *(growing +5%)*

Breakout snacks are engineered to be ***visually loud***, ***creator-led***, and ***built for sharing***

VISUAL IMPACT

Snacks must ***stand out*** to win discovery

Stop the scroll and signal value instantly, both online offline

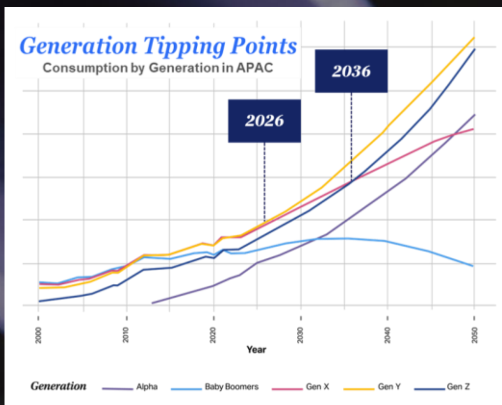
SUSTAIN & SCALE

The real winners ***maintain momentum*** after the 14th month

Convert hype into scale through ***strong availability***

Brands need to target Consumers, Technology & Products of the future

While it is important to be in touch with the current trends, to stay relevant in Snacks & Confectionery, it's important to not become tunnel visioned in the NOW and zoom out to look forward to the FUTURE.



Consumers of the Future

Who are your future S&C shoppers? Millennials & Gen Z are set to dominate spending in the next 30 years!

Technology of the Future

Picture a world where the real decision-maker isn't the consumer, but the AI assistant acting on their behalf.

Willingness of shoppers to use *AI Assistants to manage their shopping in the future*

Global	51
APAC	61
Gen Z	68
Millennials	66
Gen X	55
Boomers	53

Products of the Future

Blurring of category lines represent both a threat and an opportunity to attract new consumers into the fold

Freezing Yogurt & Biscuits

Icecream & Potato Chips?

This is not Fried Chicken

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This is a shortened version of our Thought Leadership – Pulse of the Impulse. For the full piece, please reach out to us via email (simply click on our respective picture).

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About NIQ

NIQ, the world's leading consumer intelligence company, reveals new pathways to growth for retailers and consumer goods manufacturers. With operations in more than 100 countries, NIQ delivers the most complete and clear understanding of consumer buying behavior through an advanced business intelligence platform with integrated predictive analytics. NIQ delivers the Full View.

NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit NIQ.com