



The World Ahead: Trends Destined for North America

The new trends pipeline



Built for the Future

Presenters



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The Old Model Is Broken

The traditional model of cultural diffusion —

trends radiating one-way from New York, London, or Paris

— **is over**

*"TikTok-fueled **K-beauty boom** triggers a retail race in the U.S."*
(CNBC)

*"Gen Z puts **LATAM flavors** front and center."* (The Food Institute)

*"How **Japan replaced France** as the country young Americans obsessively romanticize"* (Fortune)

*"**Dubai chocolate**...has made people around the world actively crave something associated with the UAE."* (Time)

*"Is this a 'very Chinese time in your life'? **Chinamaxxing** trend boosts China's soft power"* (BBC)

*"The global fragrance industry is moving towards richer, long-lasting scents inspired by **Middle Eastern perfumery**."* (Scento.com)

Only 10%
are in the US
and Europe

World Data Labs, Generations Forecasts



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World Data Labs, Generations Forecasts



25%

Of the world's population

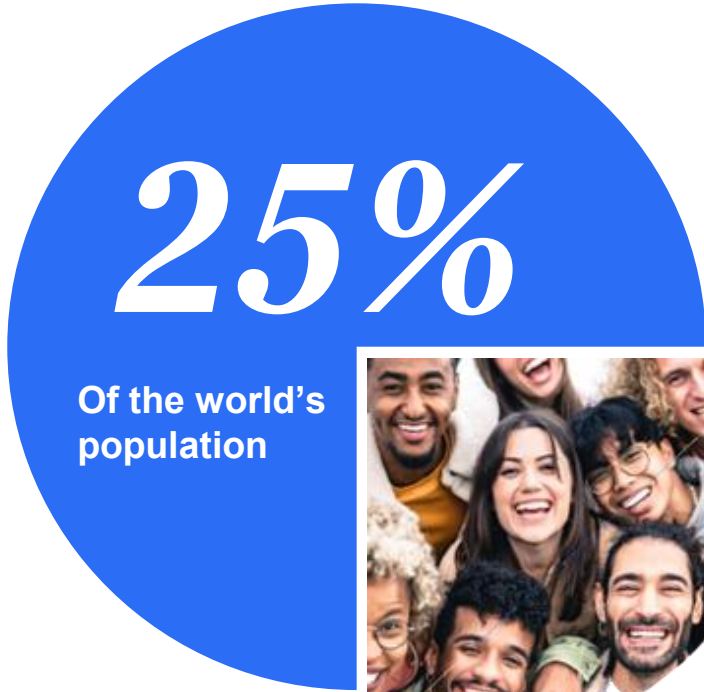
A diverse group of smiling people of various ethnicities and ages.



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Of the world's population

A diverse group of smiling people of various ethnicities and ages.



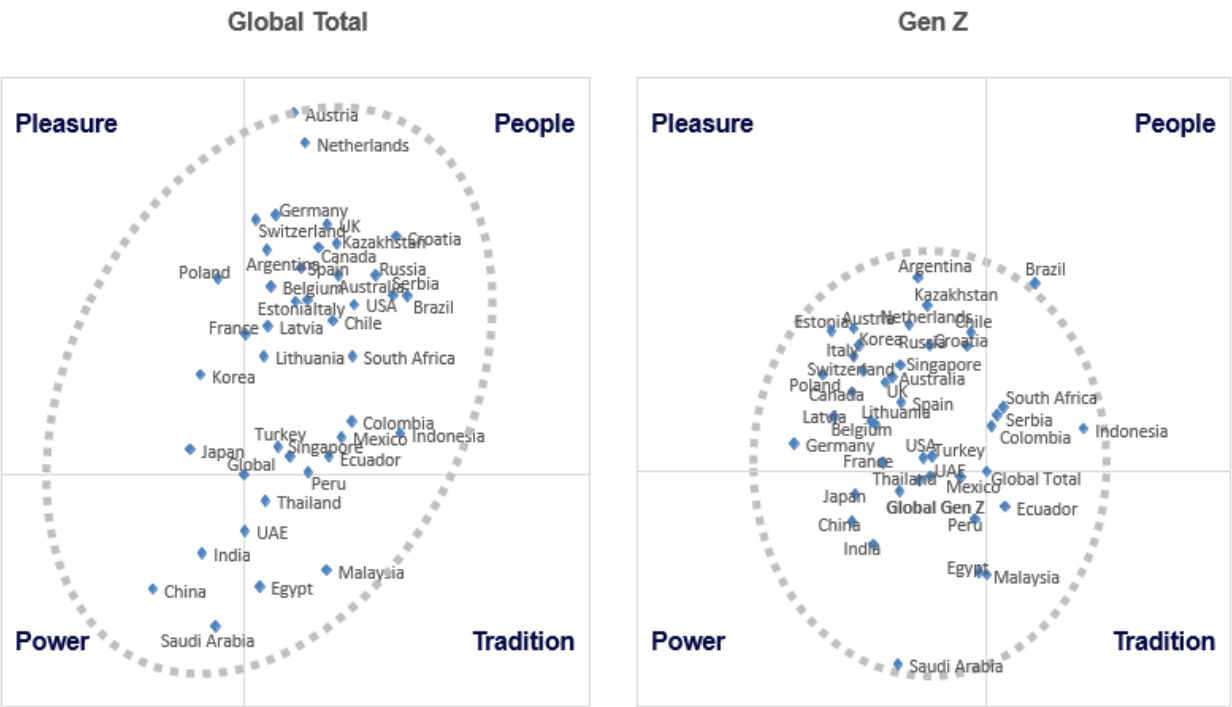
2 Billion Gen Zers

Region	Percentage
Europe	17%
North America	20%
Asia Pacific	24%
LatAm & Caribbean	25%
Middle East & North Africa	27%
Sub-Saharan Africa	32%

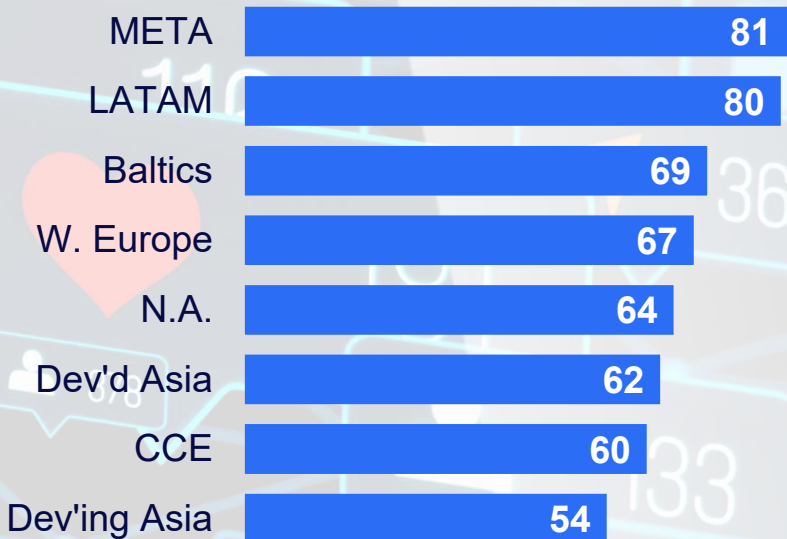


These globally-connected consumers are *more open to trans-border ideas* than any generation before them

Gen Z values more aligned across borders



Gen Z daily social media use



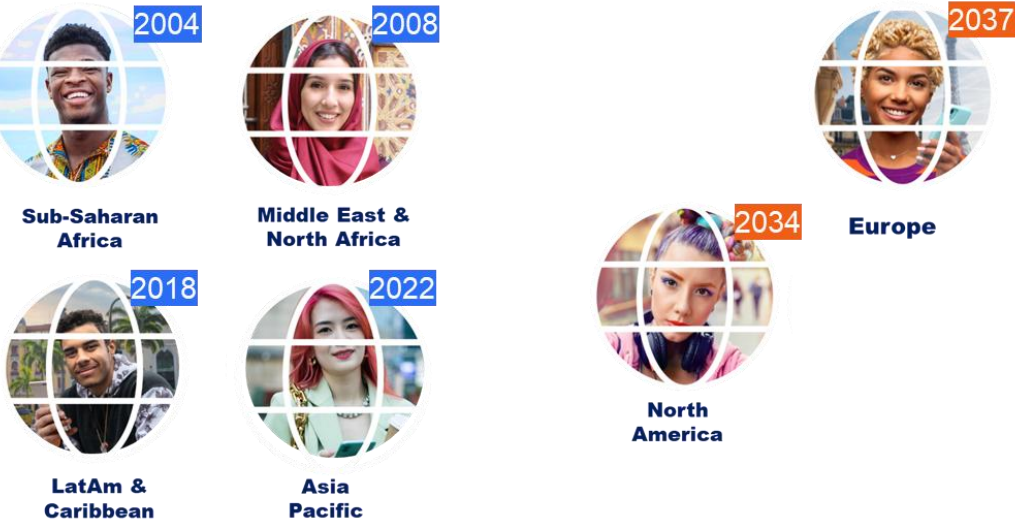
83%

of Gen Z feel their **cultural tastes are becoming more international** over time because of wider access to content from around the world, **+7 pts** from total

The Strategic Stakes

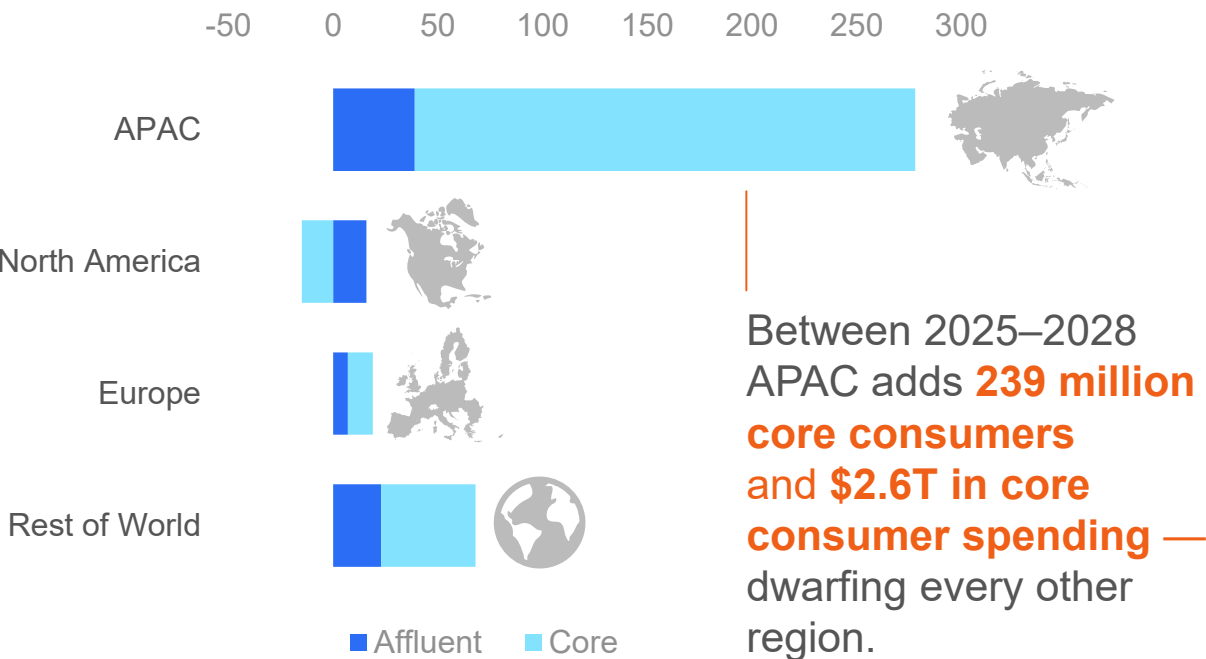
Understanding this shift is not optional, *it's the difference between leading culture and chasing it*

Generational consumption “tipping point”



APAC dwarfs the world in Consumer Class growth

Head count growth of core** and affluent*** consumers, 2025-2028, in millions



Trends that are making their way West

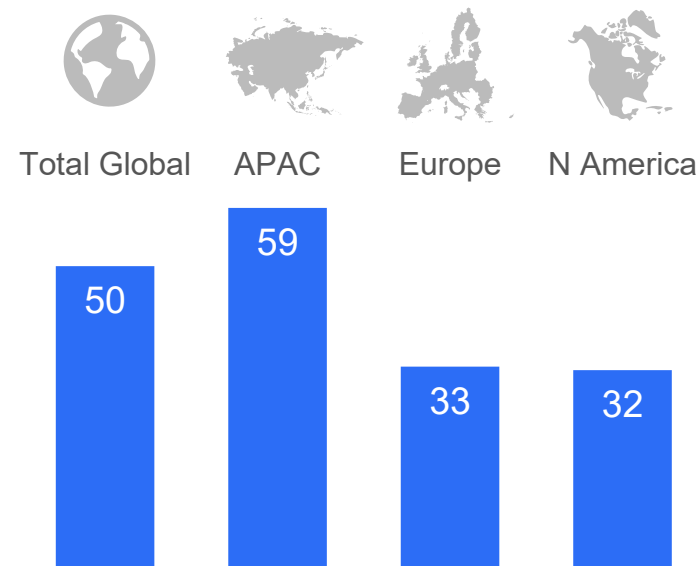


Shopping: Already Arrived

Social commerce, group buying, social influence — all born outside the West

Social commerce East vs. West

Have ever purchased via social media



Buying directly through social sites led heavily by Asia, particularly Indonesia 88%, China 73%, India 67%

Live Commerce Scale

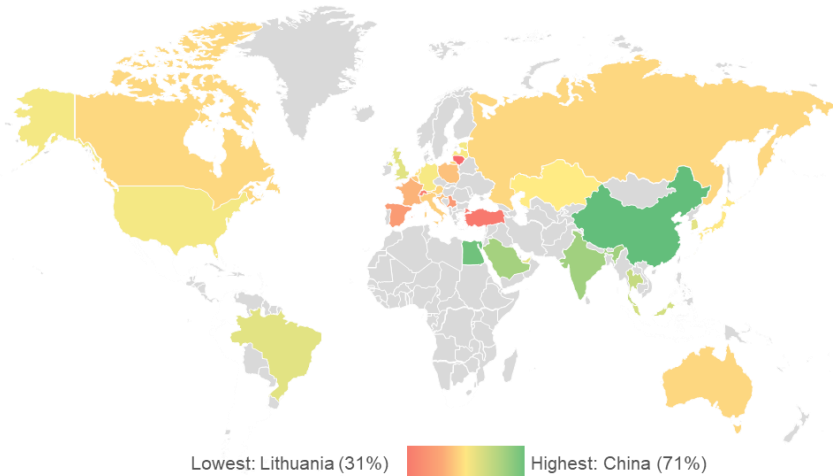


China live commerce nearly the size of the entire US e-commerce market at \$900 billion

87% of Chinese users attend monthly.

Gen Z social influence on purchase

% Gen Z 15+ who agree “Social media influencers impact the brands I buy”, by country

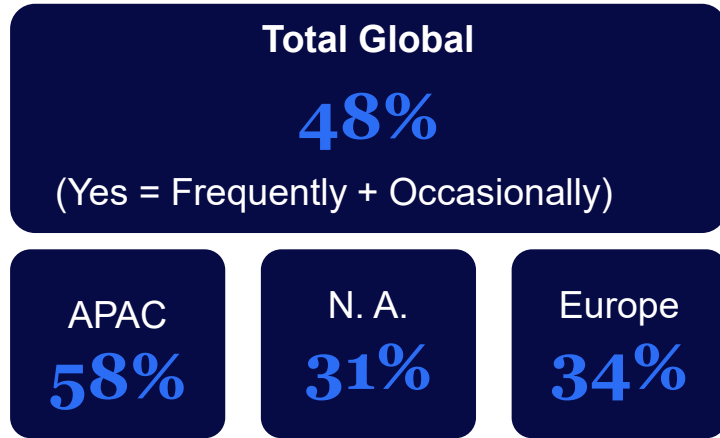


60% of Gen Z agree, “I follow product/topic experts or reviewers on social media”

58% also agree “Social media influencers impact the brands I buy”

Shopping: Coming Next

Resale as primary channel + quick commerce reshaping grocery



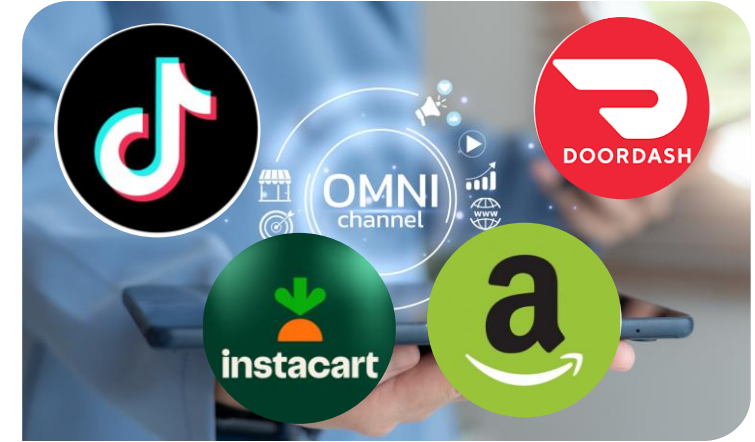
Quick commerce East vs. West

- 70% of APAC consumers shop fast commerce at least once per month.
- Key drivers: limited-time deals (57%), immediate needs (56%), impulse buying (55%).



Proliferation of dark store networks

- India projected to exceed 5,000 locations by year end, each processing up to 1,800 transactions per day.
- 1/3 now use online and quick commerce for “top-Up” shopping – regular restock items not in bulk



US omnisaes adopt Easts formats

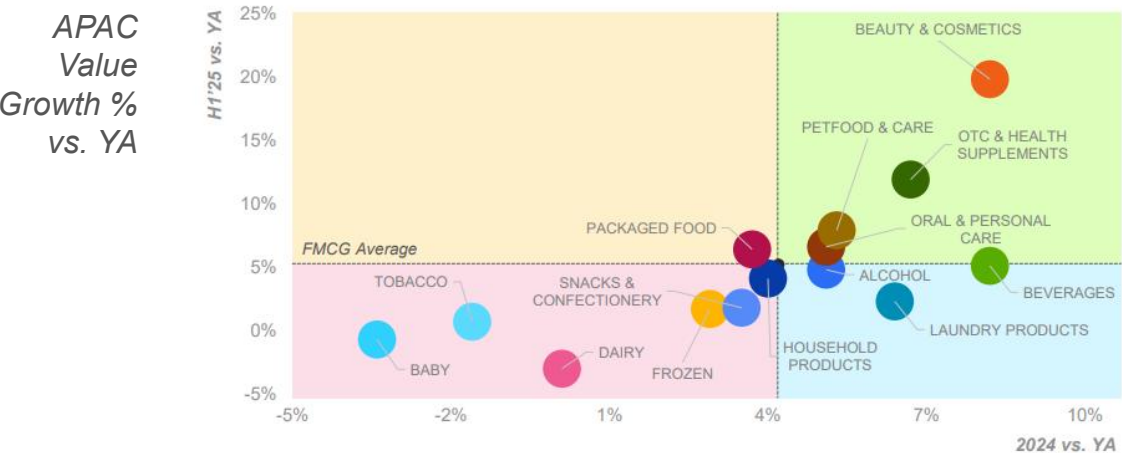
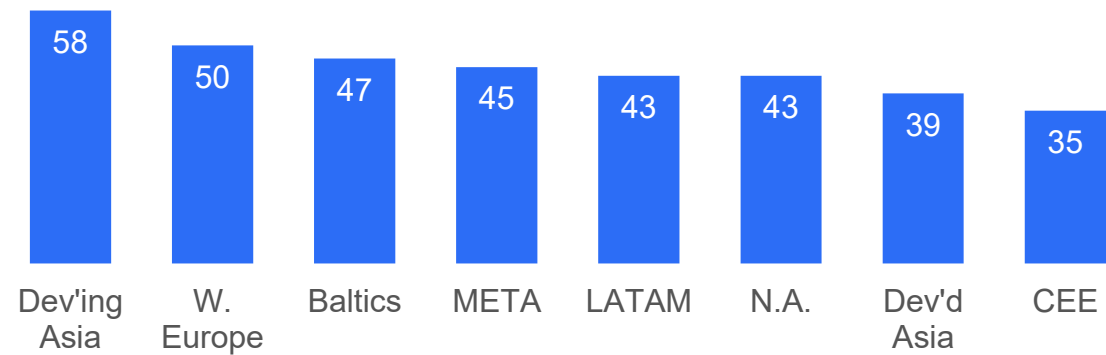
- 63% USD % change YOY Social commerce (TikTok)
- 62% USD % change YOY Quick commerce (DoorDash)
- 19% USD % change YOY Same-day commerce (Instacart, AmazonFresh)

Beauty: Already Arrived

K-Beauty transformed skincare

Developing Asia leads in lifestyle and category growth consumption

% Have a regular skincare routine



Youth lead shift in product expectations

52%
 of Gen Z seek out nutrients/ingredients that **keep them healthy**

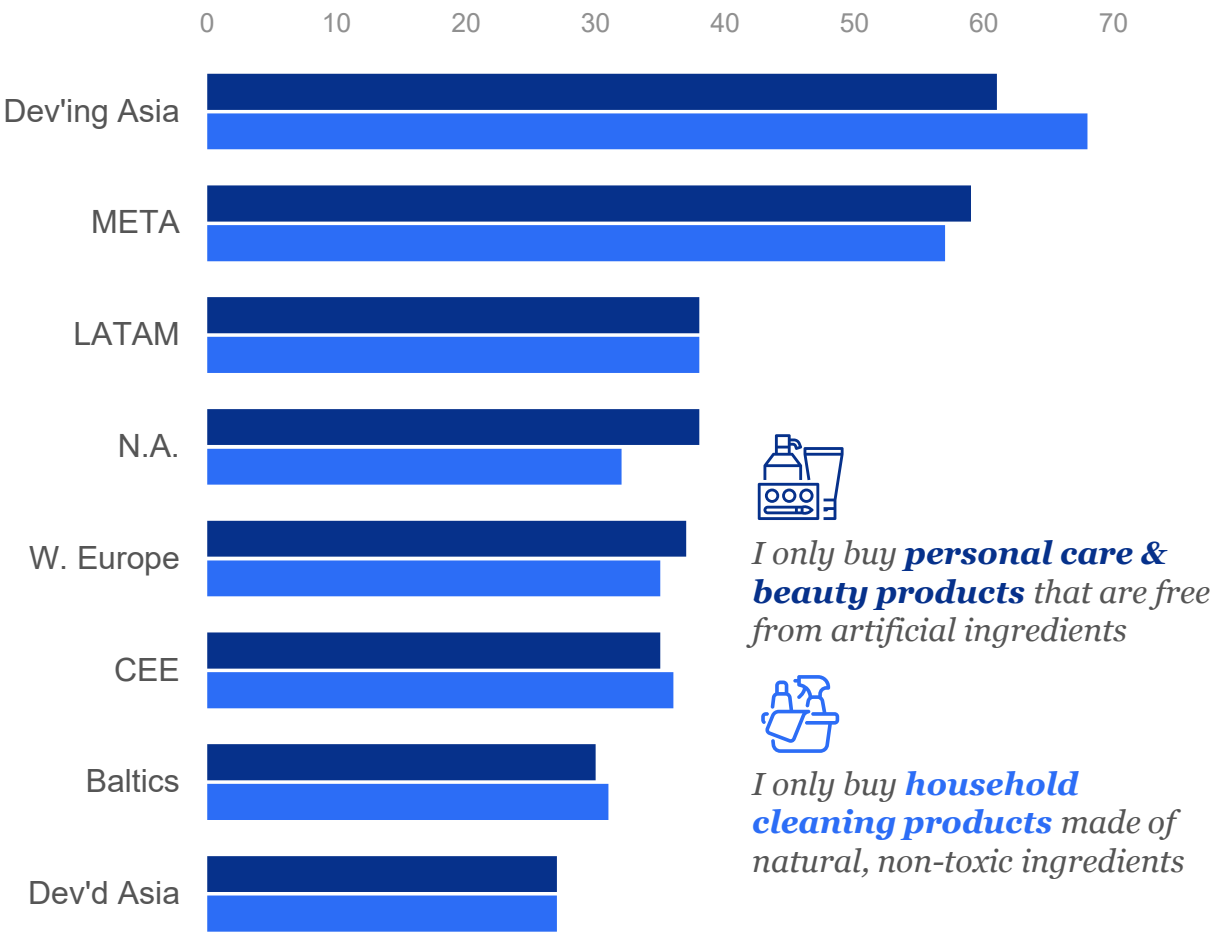
42%
 desire **natural**, not artificial ingredients

1 in 4
 Gen Zers say **animal-friendly** manufacturing influences their purchase decisions



Beauty: Coming Next

Health-beauty converges across consumption and lifestyle sectors



NIQ Consumer Life Global 2025 H50, H51, F11, ATL (US filter); NielsenIQ, Homescan GLP-1 Panel Survey (Aug/Sep 2024)



50% of weight-loss meds users* agree
“I only buy personal care and beauty products that are free from artificial ingredients”
+14 pts from Total US

Broader impact beyond food & beverages

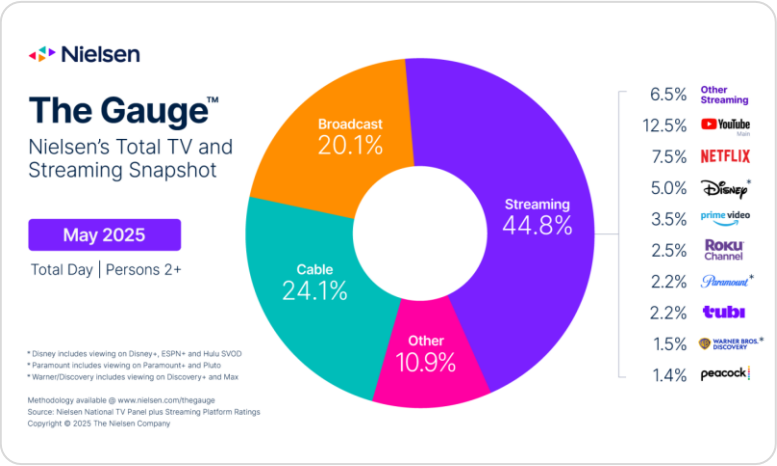
-  **Fashion:** Driving demand for smaller sizes and need to refresh wardrobe
-  **Beauty:** Driving demand for skincare and medical procedure to improve skin elasticity
-  **Fitness:** Reshaping fitness as gyms target GLP-1 users with workout to combat muscle loss
-  **Perfume:** Boosting sales of perfume as people seek “sensory inputs” missed from food

“The look, feel and smell of a product is very important to me” #5 life attitude among GLP-1 users on a list of 44, **+7 ranks** from non-users

Social: Already arrived

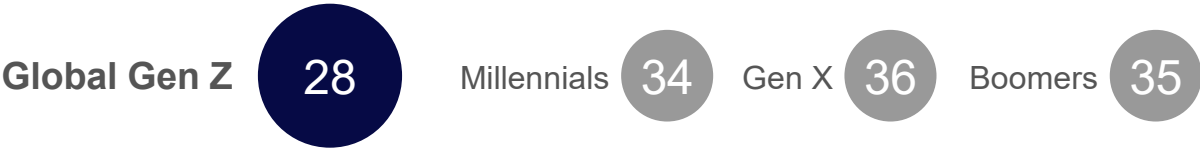
Short-form video, fan culture as identity, and collectivism in consumption

US streaming outpaces broadcast and cable for the first time in May 2025



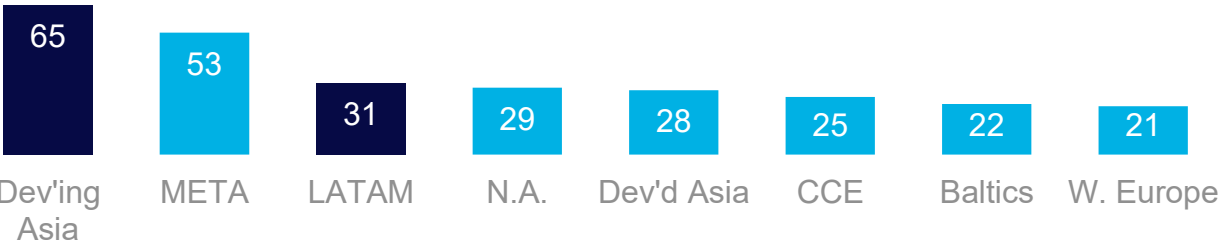
Global youth drives adoption of new trends

I am always looking for novelty and fun, even in everyday products (rank)



Asia + LATAM outsized social media influence on shopping

% agree, Social media influencers impact the brands I buy



Social: Counter-Trend Coming Next

While social deficit rises in the West...

 Since 2010, time alone is up

+45%

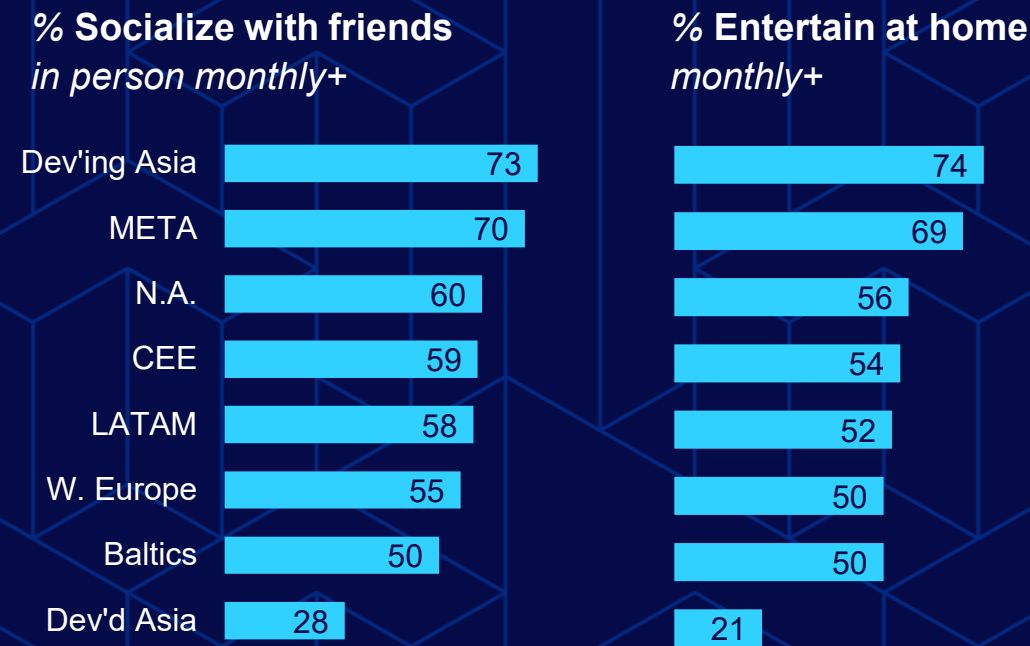
Time spent socializing with other people in person is at a record-low since 1965.*



4 in 10 live in **non-family households**...
mostly people living alone



... IRL rituals reclaim ground, especially in the East and Middle East



Shakira performed for nearly 2 million people at Copacabana Beach, turning the iconic shoreline into a massive live venue and delivering one of the largest, most unforgettable concerts ever staged.

Tech: Already arrived

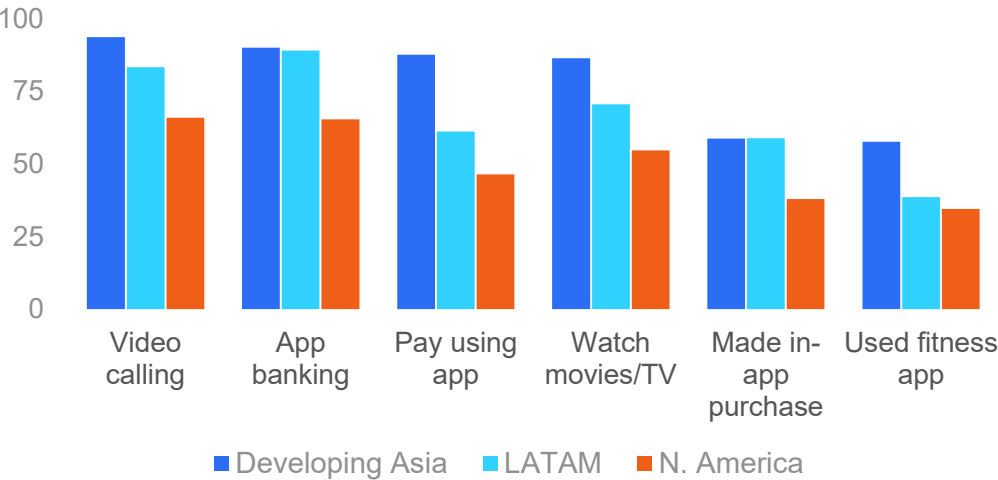
Mobile-first mindset leads from the East and South



“My smartphone and/or tablet is my most important online shopping tool”

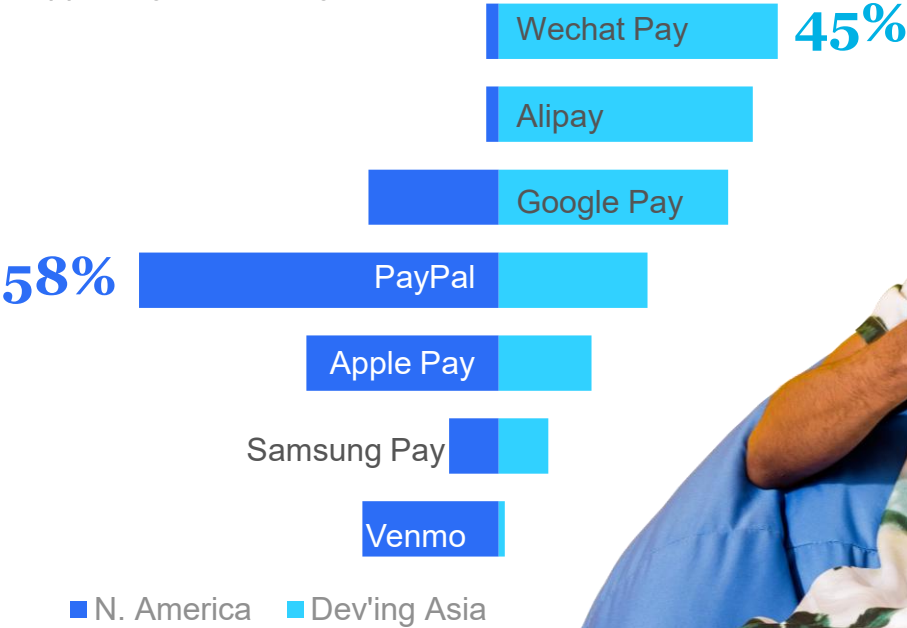
#1 shopping attitude globally and in all key Asian markets except for Korea where it ranks #2*

Activities in past 30 days on a mobile phone



Digital Wallet Divide

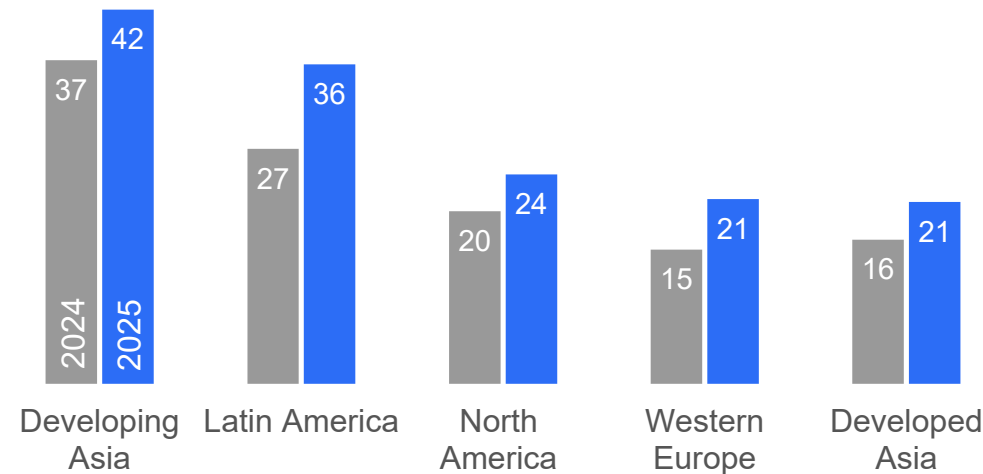
Which of the following digital wallets or mobile payment apps do you currently use?



Tech: Coming Next

AI companions going mainstream, led by pro-AI East

% who used AI apps or tools in the past 30 days



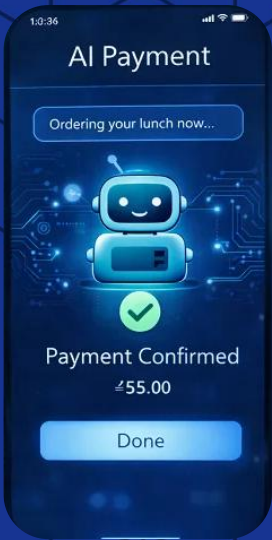
68% in China agree, “I think that the potential benefits of artificial intelligence (AI) outweigh its potential harm”

In China, AI avatars extend social media and livestream commerce with 24/7 engagement

\$1.1 trillion Livestream retail sales in China are expected to reach \$1.1 trillion in 2026, from \$683 billion in 2023.



Across the country, brands are integrating AI hosts into their livestream e-commerce strategies to cut costs and improve efficiency, employing human hosts during peak hours to engage viewers and virtual hosts during off-peak hours to maintain traffic. —Jing Daily, Nov. 2025



Alipay's AI Pay processed **120 million** agent-driven transactions in a single week (Feb 2026).

Alibaba's Qwen chatbot reached 100 million monthly active users within two months. Chinese tech companies spending ~\$42 million/month on AI shopping tools.

Automotive: Already arrived Asia already defines the global EV and mobility playbook

China is the global EV leader

BEV sales 2025



13.2 million
53% new car sales



1.6 million
10% new car sales



China's BYD overtakes Tesla as world's top EV seller
— Jan. 2026, BBC

Two-wheeled electric on the rise

% globally who ride



Electric scooter
or motorcycle

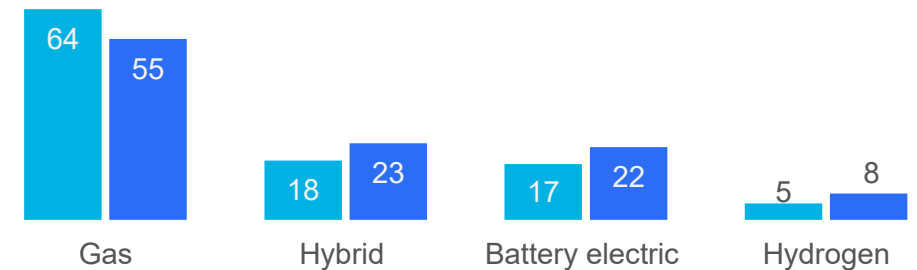


Electric bike



Youth lead in alternative energy

% globally who **drive**
type of vehicle (among
own/drive)



BEV consideration indexes highest in Asia, followed by Middle East and LATAM, lowest in N. America and Baltics

Automotive: Coming Next

The next auto disruption isn't electric — it's software, autonomy, and price

Affordable EVs reset price expectations

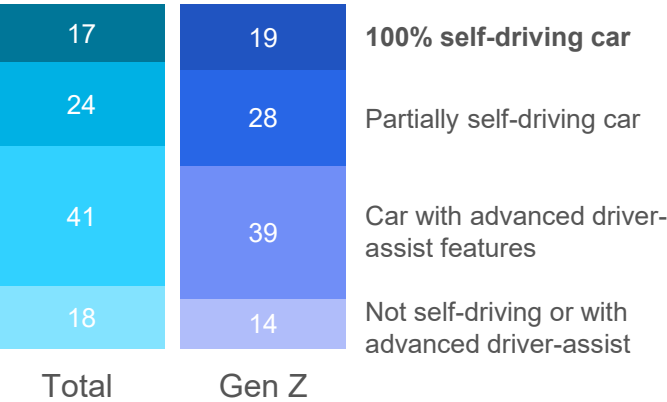


Average EV price in China is about \$18,000 less than in the US

BYD sells its Seagull EVs for \$10,000

Self-driving goes mainstream

% global distribution by preference if purchasing a car



Partial and 100% self-driving highest among Gen Z in developing Asia 53% and Developed Asia 48%

Cars become digital environments



74% of global Gen Z say it's very important that a car has the **latest wireless/mobile tech**

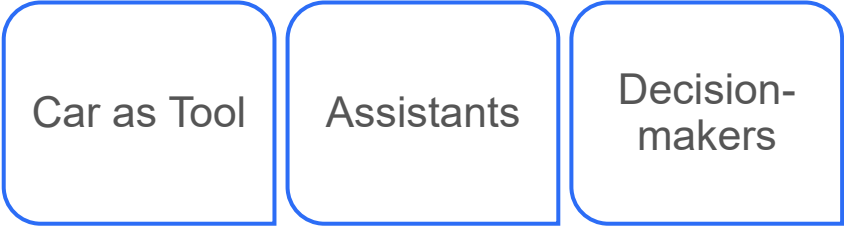
It's the **#1 Vehicle attitude** in China, more important than driving experience or image

Automotive: Further Next

The car is becoming an AI agent —
and ownership is becoming optional



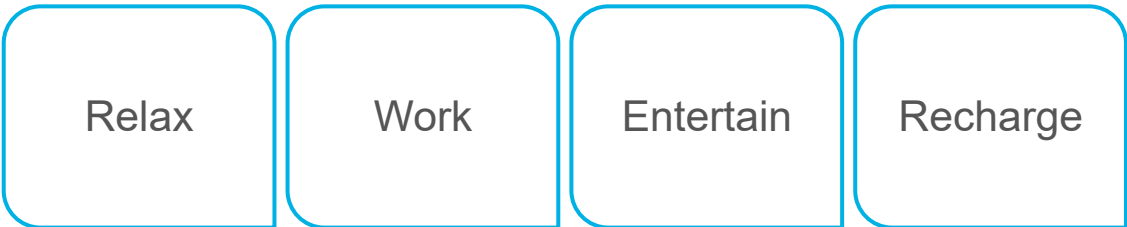
Agentic AI driving



Mobility replaces ownership



Experience becomes the product



Connecting the Dots

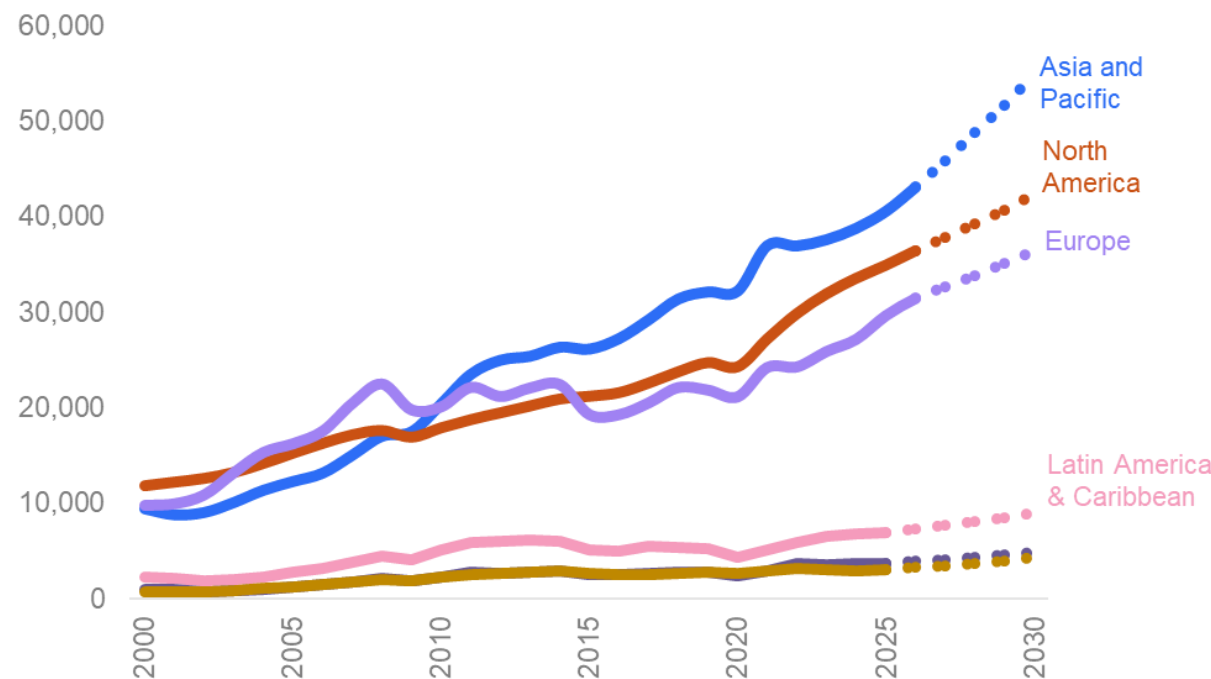


Every category tells a similar story

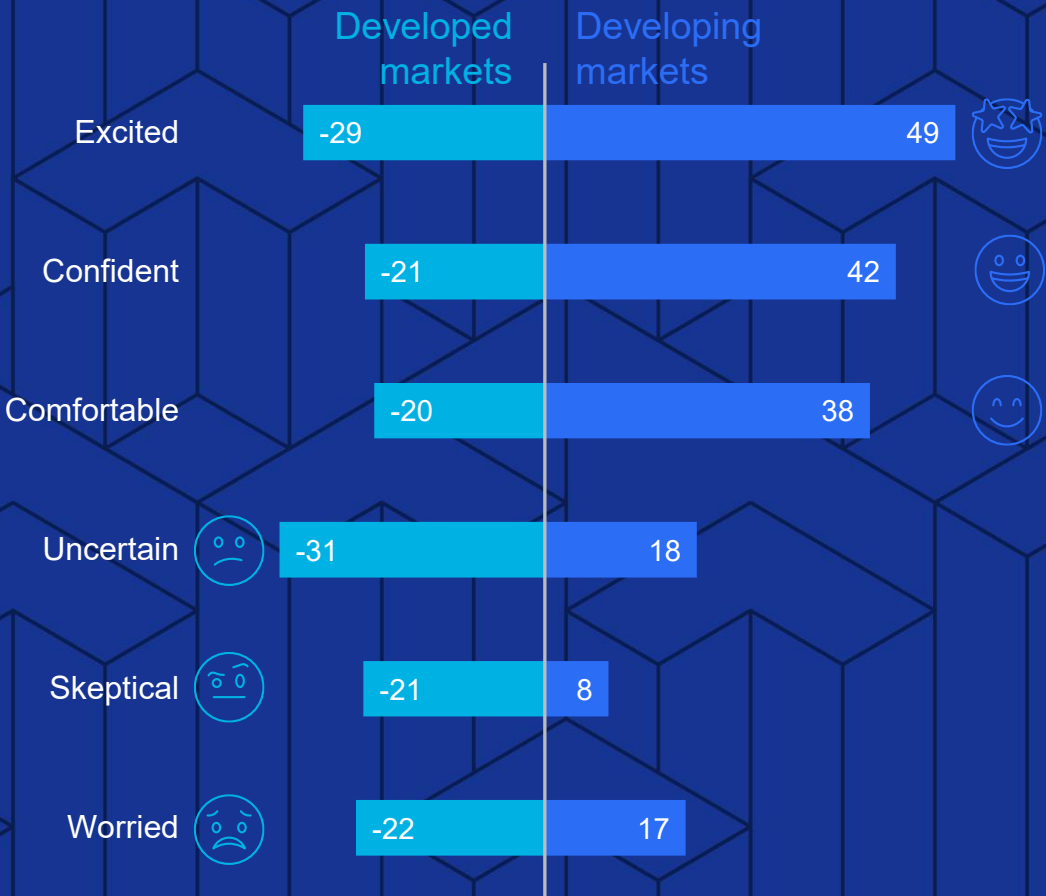
Trend pipeline has reversed, driven by economic, technological, and societal shifts

Shift in consumption power with GDP rise in Asia and Pacific

GDP, current prices (Billions of U.S. dollars), 2000-2030*



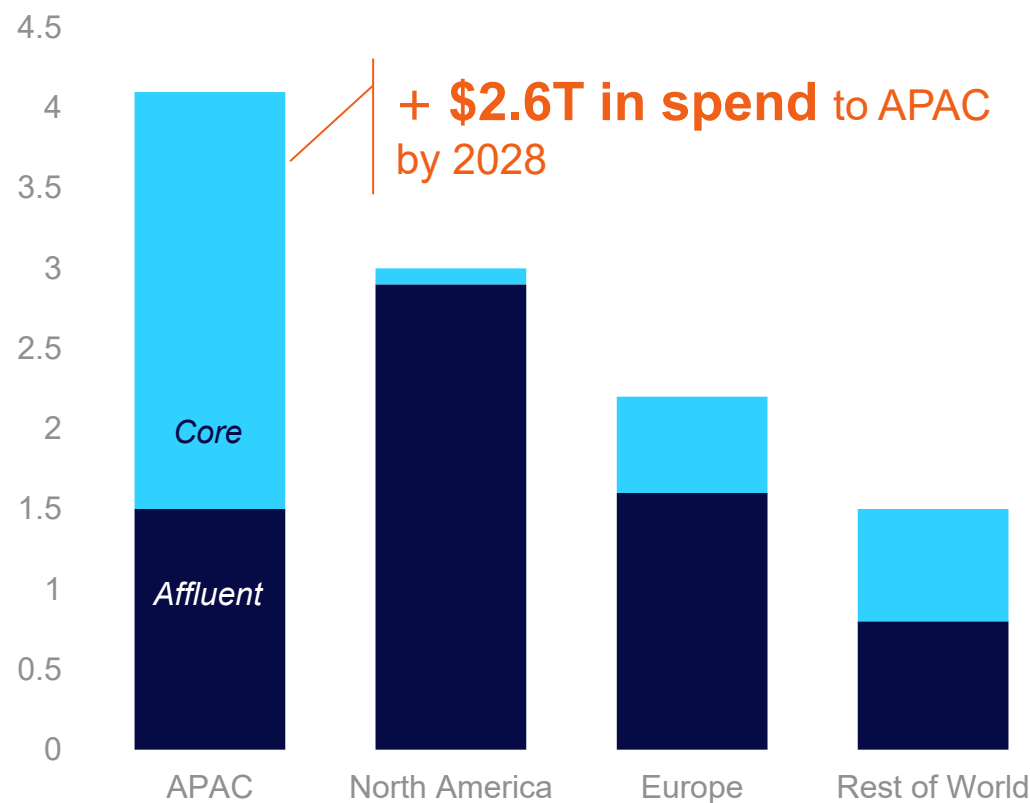
% saying how technology makes them feel about the future



Action: Be upstream, not downstream

The brands that will own the next decade are already present at the source

Spending growth of core** and affluent*** consumers, 2025-2028, in trillions of dollars



Gen Z is the fastest-growing generation and **only 10% are found in the US and Europe**

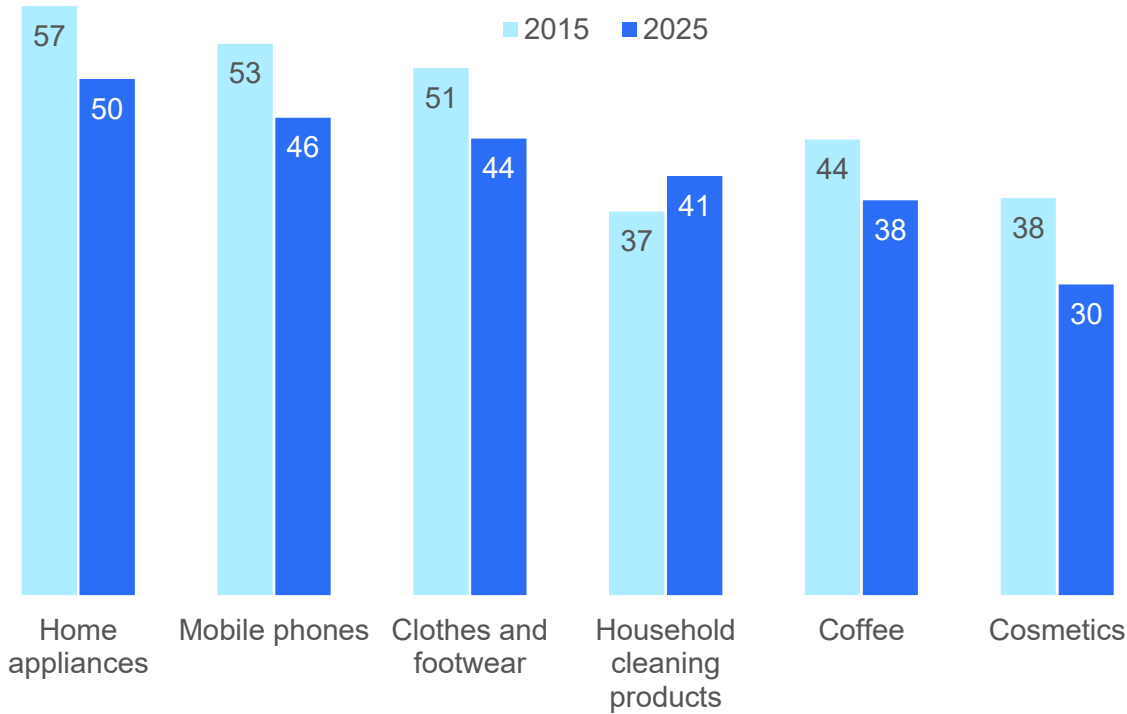


Rethink your trend radar

If your trend intelligence is West-centric, you're already behind...



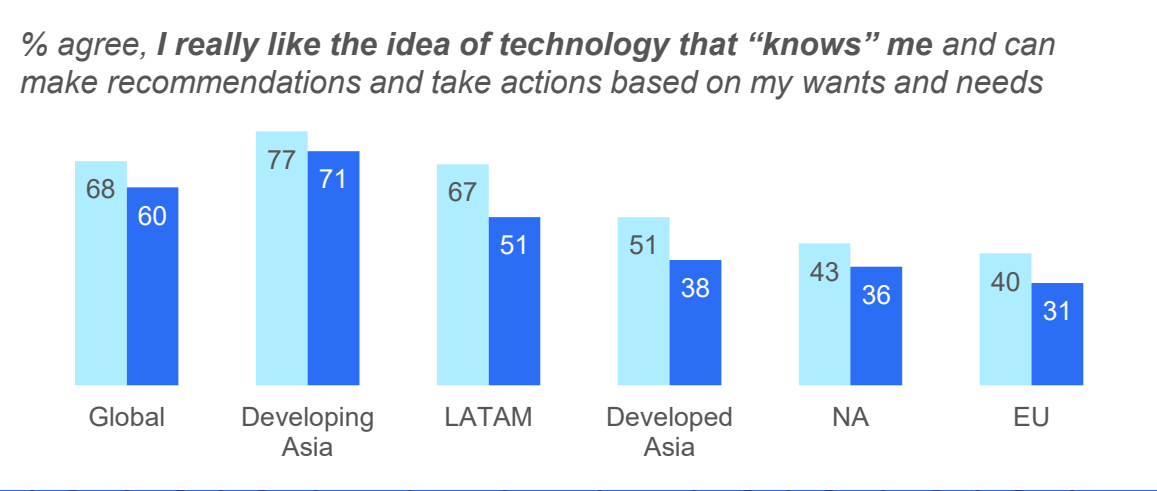
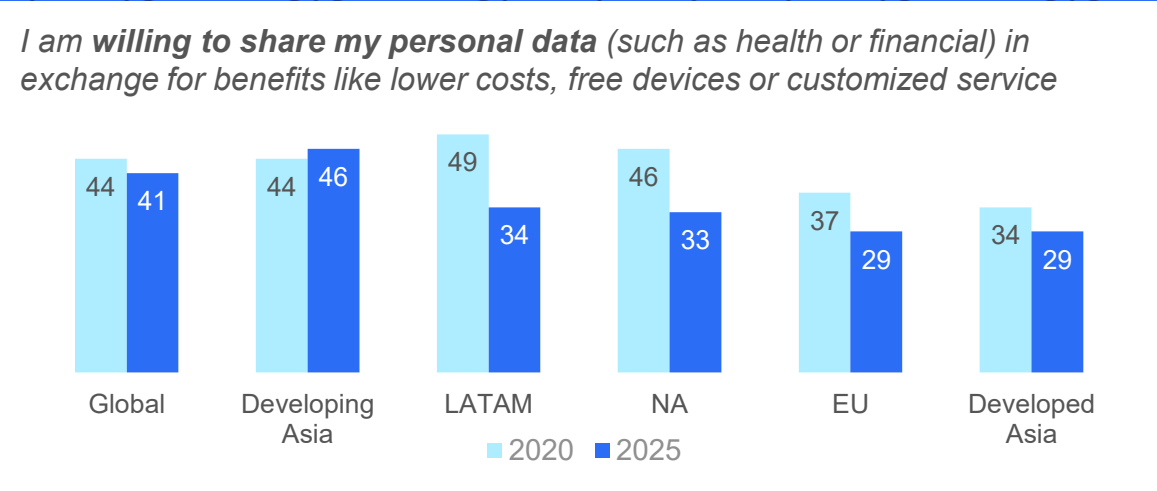
Brand differentiation in the US is declining
% agree some brands are different in category and worth paying more for



NIQ Consumer Life Global & US 2025



....and don't expect consumers to make it easier on you



WHAT WINNING BRANDS DO:

The brands that will own the next decade are not waiting for these trends to arrive fully formed in Western markets.

They are **already present at the source** — in the night markets of Jakarta, the barbershops of Lagos, the rooftop bars of Beirut, and the beauty halls of Seoul.

The pipeline has reversed.

The only question is whether **your brand is positioned upstream or still standing at the end of the line** waiting for permission to act.



Thank you!



Built for the Future