

Yuchu discusses how manufacturers must balance advanced food science with cultural familiarity across sweeteners, fats and oils, cocoa, and texture innovation to drive differentiation without sacrificing affordability. Looking ahead, she underscores ingredient intelligence as a critical innovation engine, separating companies that anticipate consumer expectations from those that merely react to them.

Ingredient perception has moved from the margins to the center of purchase decisions in Asia. Your data shows over 70 per cent of consumers now check ingredient labels, and more than half actively share ingredient knowledge. From Cargill's vantage point, is this merely a transparency trend or does it mark a deeper structural shift in how brand trust and pricing power are built in Asian food markets ?

We don't see this as a short-term transparency trend. It is a structural shift in how brand trust and pricing power are built in Asia. When over 70 per cent of consumers are checking labels and more than half are actively sharing ingredient knowledge, ingredients stop being a compliance or back-of-the-pack issue and become a front-of-mind brand asset.

Trust now goes beyond the brand - it is also going into the finer print. Historically in many Asian markets, brand heritage, scale, or price were enough to secure trust. Today, consumers increasingly audit products through ingredients before deciding if they want to consume it.

Secondly, our data shows that more than 58 per cent of consumers are willing to pay a premium for products with higher-quality, sustainable, or fortified ingredients, and they convince their peers to do the same. High quality and healthy ingredients signal value.

Pricing power increasingly comes from these ingredient choices that consumers are seeking and can recommend to their family and friends. For manufacturers, this means ingredient strategy is no longer just an R&D decision; it's a core commercial and brand strategy lever.

The study reveals a sharp polarity: natural-sounding ingredients are increasingly rewarded, while scientific or unfamiliar names face stronger backlash than in earlier waves. How should food manufacturers reconcile this consumer psychology with the growing reliance on advanced food science, functional fortification, and precision formulation especially in categories like beverages, infant nutrition, and ready meals ?

While it seems that unfamiliar or scientific names are facing stronger backlash than in previous waves, this does not reflect a rejection of food science, but rather how consumers process trust and familiarity. Asian consumers respond to the naming of an ingredient.

Its nomenclature, framing, familiarity besides the brand credibility all matter more than scientific complexity. Our experience shows that advanced functionality can be accepted when positioned through recognizable sources, everyday benefits, and consistent brand trust, rather than technical explanations.

Manufacturers should not retreat from advanced food science but instead translate it into benefits consumers understand. Lead with clear health outcomes, anchor formulations in familiar sources such as plants or fermentation and simplify or localise product ingredient language to build trust and acceptance.

Willingness to pay is rising but selectively. With 58 per cent of consumers willing to pay a 10 per cent premium for higher-quality, sustainable, or nutrient-fortified ingredients, how should companies decide where to invest in premiumisation without overengineering products or eroding mass affordability in Asia's price-sensitive markets ?

According to a report by Bain, consumers in fast growing markets like China, Indonesia are more conscious of environmental and social factors than those in mature markets like Australia and Singapore, which triggers sustainable purchasing in those markets. Consumers in emerging Southeast Asian markets are prioritizing affordability and value but despite that still seek sustainability and wellness-based products. Hence, in my opinion, successful manufacturers will have to adopt a segmented premiumisation strategy.

Companies should focus premium investment on key categories and ingredients that deliver maximum health/ nutrition impact, rather than on entire portfolios.

Chocolate and cocoa are emerging as both indulgence and ethics categories. IngredientTracker highlights rising expectations around local sourcing, sustainability, and authenticity alongside flavor and texture innovation. Do you see cocoa in APAC evolving into a provenance-driven category similar to coffee or wine or will indulgence always outweigh origin storytelling ?

Chocolate consumption has increased over the last several years and is projected to continue to increase.

There are many factors driving the increase in chocolate consumption including experiential consumption, i.e. consumers looking for an indulgent experience rather than just a snack, and the growing availability of different varieties – provenance, low sugar, zero sugar, dark chocolate, sustainable chocolate etc.

While expectations around sustainability, ethical sourcing, and local production are rising, this does not indicate a full shift toward a provenance-led category. Instead, origin and authenticity act as optional value enhancers.

A large part of chocolate consumption remains driven by nostalgia. While multi-sensory experiences are driving an increase in consumption, many consumers are also choosing the brands and products they know and have grown up with.

In sweeteners, “less sugar” is no longer enough—functionality now matters. With additive sweetener use in beverages rising sharply and consumers gravitating toward monk fruit, brown sugar, and cane sugar, how do you see the next phase of sweetener innovation unfolding: reformulation, metabolic health positioning, or ingredient blending strategies that balance taste, trust, and regulation ?

IngredientTracker APAC 2025 shows that sugar-free and low-sugar claims are rising, with additive sweeteners in beverages increasing from 18 per cent to 29 per cent of launches across APAC.

The next phase of innovation will center on ingredient blending strategies that balance taste, texture and health impact, while ensuring brand trust as well as regulatory compliance.

Brands are likely to combine natural sweeteners like monk fruit or brown sugar with functional additives targeting metabolism, gut health, or immunity.

Texture has become a premium signal, not just a formulation choice. Asian textures like mochi and boba are now global, and plant-based texturizers are gaining acceptance. How strategically important is texture innovation in differentiating brands today—and do you see texture becoming a stronger driver of value than flavor in certain categories ?

While flavor remains the primary driver of consumption, texture has emerged as a strategic lever for differentiation. Asian-inspired textures like mochi and boba enhance the multisensory experience, creating memorable, emotionally engaging products that complement taste rather than replace it. These drives repeat purchase and premium positioning.

In categories like beverages, desserts, and snacks, where flavor alone is easily replicated, thoughtful textural innovation can reinforce brand identity, encourage repeat purchase, and deepen consumer loyalty, making it a valuable tool alongside compelling flavor profiles. This strengthens brand equity, supports premium pricing, and makes products harder to replicate, translating sensory innovation directly into measurable commercial advantage.

Texture also supports novelty and social sharing, generating buzz and trial.

Fats and oils are being re-rated through a health and sustainability lens. As consumers scrutinize oils for cardiovascular, immunity, and clean-label benefits, how should manufacturers rethink legacy formulations—particularly in snacks and ready meals—without compromising shelf life, cost, or taste?

The shift towards health and sustainability in our food is reshaping product development across food manufacturers, particularly in snacks and ready meal categories. Cargill’s category professionals not only decipher market trends that shift ingredient choices in mass consumers, but also work closely with industry category leaders to understand the trade offs of new ingredients to legacy formulas to specific consumer segments, and to provide innovative solutions to meet these consumers’ unmet needs.

Cargill has a diverse fats and oil portfolio that can support the health and sustainable needs of our consumers. We have stable and heart healthy high oleic oils, blended oils that combine cost effectiveness and nutrition, specialty fats and oil fractions with enhanced performance, and nature powered oil solutions that preserve shelf life instead of synthetic preservatives. Examples include:

Low-saturation frying oils (blended oils with high oleic acid), which have over 50 per cent lower saturated acid content compared to traditional frying oils without compromising stability

Sunflower seed oil with zero trans fatty acids and corn oil rich in phytosterols

Low-contaminant palm oil developed through process optimization and formula upgrades, and meeting EU standards

Low-saturation tea beverage oils, which, compared to traditional milk fats and palm oils, are not only lower in saturated acid but also offer better value and enhance the aroma of milk tea

Replacement solutions for partially hydrogenated oils, which is the primary source of industrial trans fats, that deliver comparable quality, texture, stability, and shelf life

Cargill uses sensory and performance testing on fats and oils in formulas to validate the robustness of the new formulas, and develops new functional oils and delivery systems, to tailor taste, texture in application and storage. We have also invested in technology upgrades at our edible oils facilities to produce better-functioning products

Our portfolio, production and category expertise provide category players in the market with taste, shelf life and cost, while addressing consumers' evolving demand for healthy and sustainable foods

IngredientTracker positions insight as an innovation engine, not just a research output. Looking ahead five years, how do you expect ingredient intelligence to reshape the competitive advantage of global ingredient suppliers? and what capabilities will separate companies that lead Asian food innovation from those that merely follow consumer sentiment ?

Over the next five years, leading food brands in Asia will be those that anticipate shifts in ingredient perceptions and embed consumer intelligence directly into R&D, rather than treating it as a downstream input.

Consumer sentiment and market demand are inseparable from innovation decisions.

By introducing scientifically advanced ingredients through familiar, culturally relevant and trustworthy nutrition led narratives, suppliers can help customers cater to emerging consumer demands and unlock new market potential.

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