

Asian consumers more ingredient-savvy than ever, Cargill study finds

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Consumers in Asia are more ingredient-savvy than ever before, with over 70 per cent checking labels before purchase, according to a recent study by Cargill. Conducted with 2,000 respondents across four markets in APAC (China, Indonesia, Australia and Japan), the Cargill APAC IngredienTracker 2025 assessed consumer attitudes towards 91 ingredients across four groups: Chocolate & Cocoa, Sweeteners, Texturizers, and Fats & Oils. The study also explores how consumer perceptions of these ingredients impacted purchase decisions in 13 F&B categories, including Dairy, Ready Meals, Packaged Beverages, Salty Snacks, Bakery, Chocolate Confectionery, InfantÂ formula, etc.

Cargill's IngredienTracker 2025 digs deeper into consumer perceptions to provide insights that can help manufacturers navigate these trends. The study reveals that across categories, consumers are proactively seeking healthier and more familiar ingredients in their food, as immune system-related concerns jumped 101 per cent between 2017 and 2024. Ingredients that sound "natural" or are plant-based are perceived as "good for you". In contrast, unfamiliar or scientific-sounding ingredients are often seen as "bad for you", showing stronger negative opinions than previous waves. More than 58 per cent of consumers are willing to pay 10 per cent more for premium ingredients like dark chocolate, higher quality, more sustainable ingredients, and foods fortified with essential nutrients. Purchase decisions and health

perceptions are closely linked, and more than half of the consumers like to share their knowledge of ingredients with friends or online.

Local sourcing and sustainable production prevail in Chocolate & Cocoa

Chocolate & cocoa-related ingredients dominate indulgent product categories like Confectionery, Bakery, Desserts, and Ice-cream, where sweet flavour is prevalent, and indulgence is highly valued. Chocolate is also highly associated with the Dairy category, given its flavour popularity.

The study also highlights that consumers are doubling down on products with a stamp of authenticity through local production and ingredient sourcing, often linked to local cultures and traditions. Ethical consumption is on the rise with a growing focus on sustainable farming and production. Organic and dark chocolates are perceived as the healthiest, with “high-fat” cocoa powder being seen as consistently the least healthy. Chocolate brands in APAC continue to diversify textures and flavours based on these trends and consumer desire for novel sensory experiences.

Strong preference for natural, lower-sugar and functional qualities in Sweeteners

Consumers most commonly associate sweeteners with Beverage categories, especially when it comes to non-alcoholic and bottled drinks, and the preference is for reduced sugar content and products with functional claims, such as immune support and slimming effects.

Sugar-free and low-sugar claims are rising in product launches across Asian markets, especially in beverages. Use of additive sweeteners is rising, while traditional sugars are declining. The percentage of drink launches across APAC containing additive sweeteners has increased from 18 per cent to 29 per cent. Consumers are more inclined to purchase “natural” sounding ingredients “like brown sugar, monk fruit, cane sugar, vs sweeteners with artificial or scientific names.

Increasing popularity of plant-based Texturizers

It is no secret that Asian-inspired textures like boba and mochi are going global. In fact, F&B brands in Asia are increasingly highlighting local textures to promote a premium image and sensory pleasure offered by their products.

Plant-based texturizers like pectin derived from fruit peels are popularly used in fruit-based confectionery gums and jellies. Consumers are inclined to purchase products with more “natural/familiar sounding” texturizers like gelatin, wheat gluten, as well as natural proteins from plant sources like soy, chickpea and rice.

Consumers seeking healthy, sustainably sourced Fats & Oils with functional benefits

When it comes to categories of Ready Meals, Salty Snacks and Cooking Ingredients, consumers pay most attention to the kinds of fats and oils used in these products. Consumers are increasingly interested in ingredients offering functional benefits, such as oils supporting cardiovascular health, bone health, and immunity. Trend towards locally produced fats and sustainability in oils can be seen, with attention towards clean-label and sustainably sourced oils rising. Vitamin E and fats & oils from natural sources like sunflower, canola, coconut, and soybean are rated the most familiar and healthiest and have the highest purchase impact.

“Consumer choices today are increasingly shaped not just by taste, but by how ingredients are perceived across categories. Understanding ingredient perceptions across markets is critical to help food manufacturers better optimise product formulations. This means prioritising ingredients that Asian consumers demand and labelling to help them choose ingredients and health benefits they desire. This study helps to understand and reveal what the future of ingredients and aims to support our customers in their product innovation and strategic decision-making”, said Yuchu Zhang, Vice President, R&D Cargill Food APAC.