Behind the *Value Paradox*

Key market trend Defining Tomorrow's Growth

PREVIEW ONLY

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NielsenIQ

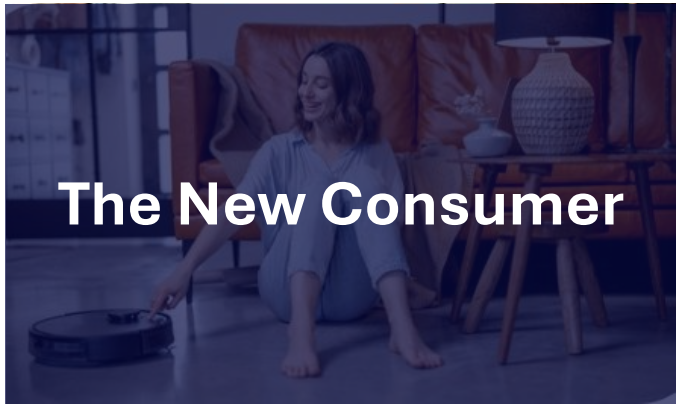
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Unveil the *Value Paradox* to 2027 growth



What determines consumer's willingness to pay?



How are demographic and lifestyle shifts defining future growth?



How are consumers moving across shopping channels with AI as their shopping companion?

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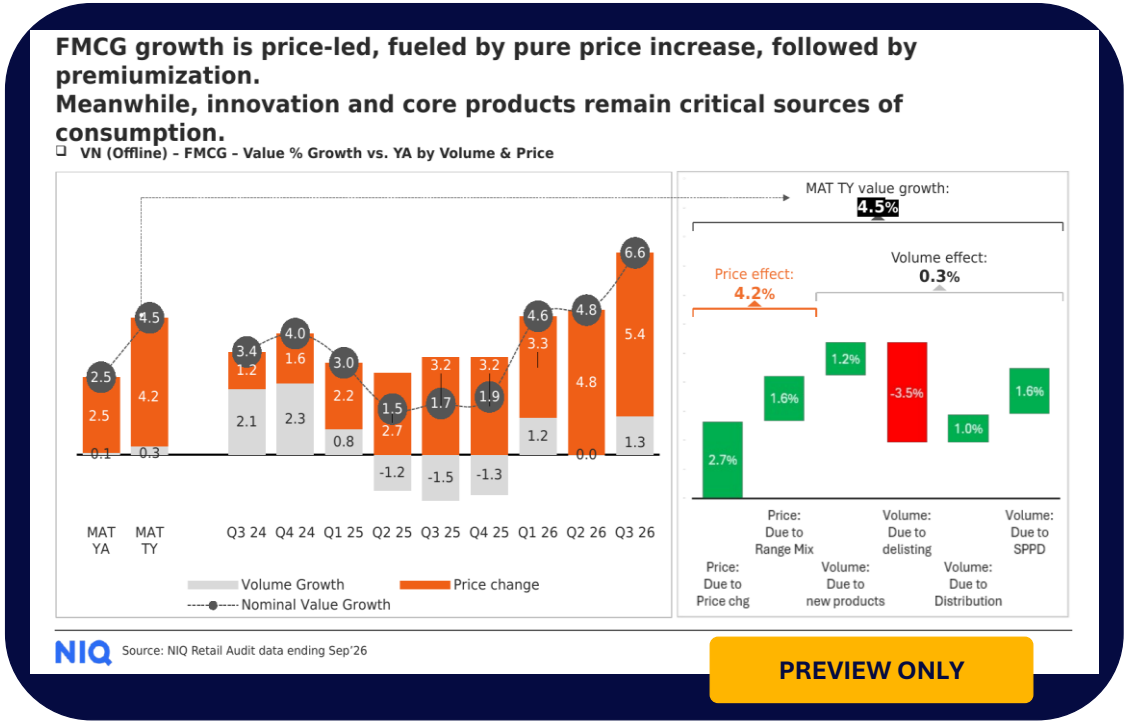
Growth is returning, but the quality of growth matters

FMCG value growth is heavily price-led, putting greater pressure on brands to protect demand.

4.5%
FMCG value growth

4.2%
price effect

0.3%
volume effect



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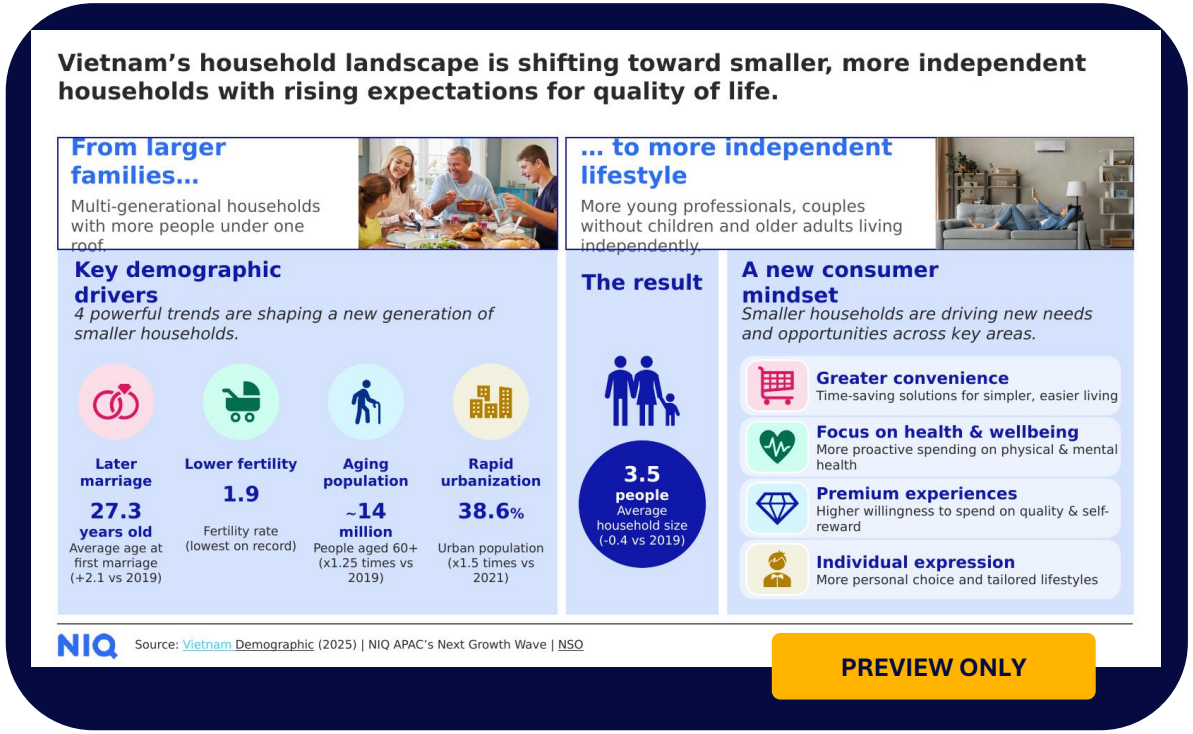
Consumers are not simply buying less. They are deciding what deserves to stay in the basket.

The full report shows how pricing power, price elasticity, portfolio switching and premium benefits can be used together to convert price into sustainable value growth.

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Smaller households are reshaping what “better value” means

Growth opportunities increasingly sit at the intersection of quality of life, relevance and willingness to pay.



49%

Healthier choices

Functional benefits and better home living

37%

Time-saving products

Convenient formats and ready-to-use solutions

31%

Better experiences

Meaningful improvements to everyday life

The full report connects these need spaces to category examples, premium propositions and future generations shaping Vietnam’s demand.

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The shopper journey is becoming channel-fluid and AI-assisted

Winning is no longer about choosing online or offline. It is about designing for missions across connected touchpoints.

1.34M traditional stores

14.5K modern trade stores

4.4 channels used on average

~92% VN consumers use AI when shopping

What the full report helps you decide

- Which channel should play which role by shopper mission
- Where distribution expansion is creating new white spaces
- **How to protect visibility as the shelf contracts from 50+ SKUs to 1–2 AI recommendations**
- How AI changes discovery, comparison, purchase and re-buy

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FULL REPORT

Turn the signals into your 2027 growth choices.

The complete report goes beyond the headlines with market diagnostics, consumer evidence, category examples and decision frameworks.

Recommended for

Commercial • Marketing • Category • Innovation • Revenue Growth Management

Inside the full report

01 Vietnam FMCG outlook and growth context

02 Pricing power, elasticity and portfolio action

03 Premiumization by tier and category

04 New consumer needs and winning propositions

05 Traditional, modern and e-commerce shifts

06 AI’s role across the shopper journey

07 Implications for 2027 planning

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Thank you

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