

tmo group

# Snacks eCommerce Sales In Southeast Asia

Published July 2025



# About This Series

From December 2022, TMO Group started publishing a series of outlooks on different industries in Southeast Asian eCommerce, analyzing sales performance in various countries. We've released outlooks on cosmetics, home appliances and more, and will continue to explore more popular industries and categories !

**Methodology:** TMO Group's expert team relies on first-hand data from major eCommerce platforms in Southeast Asian - Shopee and Lazada, and employs various analytical methods to provide readers with valuable insights.

**Currency Values:** Regarding pricing and monetary information, the analysis in the report is based on the equivalent value of the local currencies in US dollars.

**It is important to note that this report is intended for market reference purposes only, and our company does not bear any legal responsibility for the accuracy and viewpoints presented in the report.**

## TMO Services



### Market Scan & Research

Conduct a preliminary scan of different markets, define the competitive landscape and select suitable markets for your cross-border eCommerce



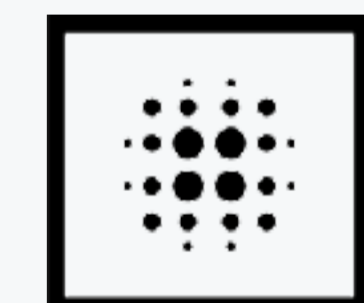
### Customized Industry Data

To help you understand the ever-changing consumer preferences and demand trends, as well as the evolving industry standards.



### Market Entry & Development Strategy

Consolidate market potential and localization knowledge to formulate short-term, medium-term, or long-term market entry and development strategies for you.



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Covering Shopee&Lazada in 6 Southeast Asian countries, spanning 7 major industries including health, beauty, home appliances, sports & outdoor, with real-time trend tracking and in-depth competitor monitoring.

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# Contents

About This Series	2
About This Outlook	5
Snacks - Market Size	6
Snacks - Main Segments	7
Snacks - Popular Brands	8
Snacks - Popular Stores	9
Dried Snacks & Nuts	10
Chocolate & Sweets	18
Fruit & Vegetable Chips, Potato Chips	26
Biscuits & Crackers	34
Closing Notes	42
TMO Data Platform	43
About TMO	44

# About This Outlook

TMO Group is excited to continue our series of Southeast Asia industry outlooks, now in its first installment for 2025. Our previous outlooks can be accessed on our website at [tmogroup.asia](https://tmogroup.asia). This month we focus on the snacks industry, including Dried Snacks & Nuts, Chocolate & Sweets, Fruit & Vegetable Chips, Potato Chips, Biscuits & Crackers.

With the growth of the global economy and the diversification of consumer markets, the snack industry is showing strong growth worldwide. This trend is especially evident in Southeast Asia. The region has a large and young population, with rising purchasing power and growing demand for snacks. **According to Euromonitor, the Southeast Asian snack market reached USD 20.83 billion in 2024, with a CAGR of 2.1% from 2019 to 2024.** Consumer preferences are also changing. Southeast Asian consumers are becoming more familiar with and accepting of international brands, creating opportunities for foreign brands. At the same time, demand for healthier snacks—low sugar, low fat, and high fiber—is increasing, providing direction for product innovation.

We used almost 120,000+ SKUs of snacks that had at least one sale during April 2025. We collected this data from Southeast Asia's two leading eCommerce platforms: Shopee and Lazada. While we understand that there may be some margin of error in the absolute numbers, we have employed a consistent methodology throughout the research. Merchant-driven marketplaces can be particularly challenging for data integration due to various SKU naming conventions across six languages. However, as our approach was consistent throughout all parts of the research, relative numbers, percentages, and structure breakdowns reflect reality quite accurately. If you require more detailed information or custom research on your particular segment, please feel free to contact [TMO Group](https://tmogroup.asia) (send an email to [info@tmogroup.asia](mailto:info@tmogroup.asia)). Southeast Asia sales data is a treasure trove of market insights waiting to be uncovered, and we are here to be your guide on this journey!

# Snacks - Market Size

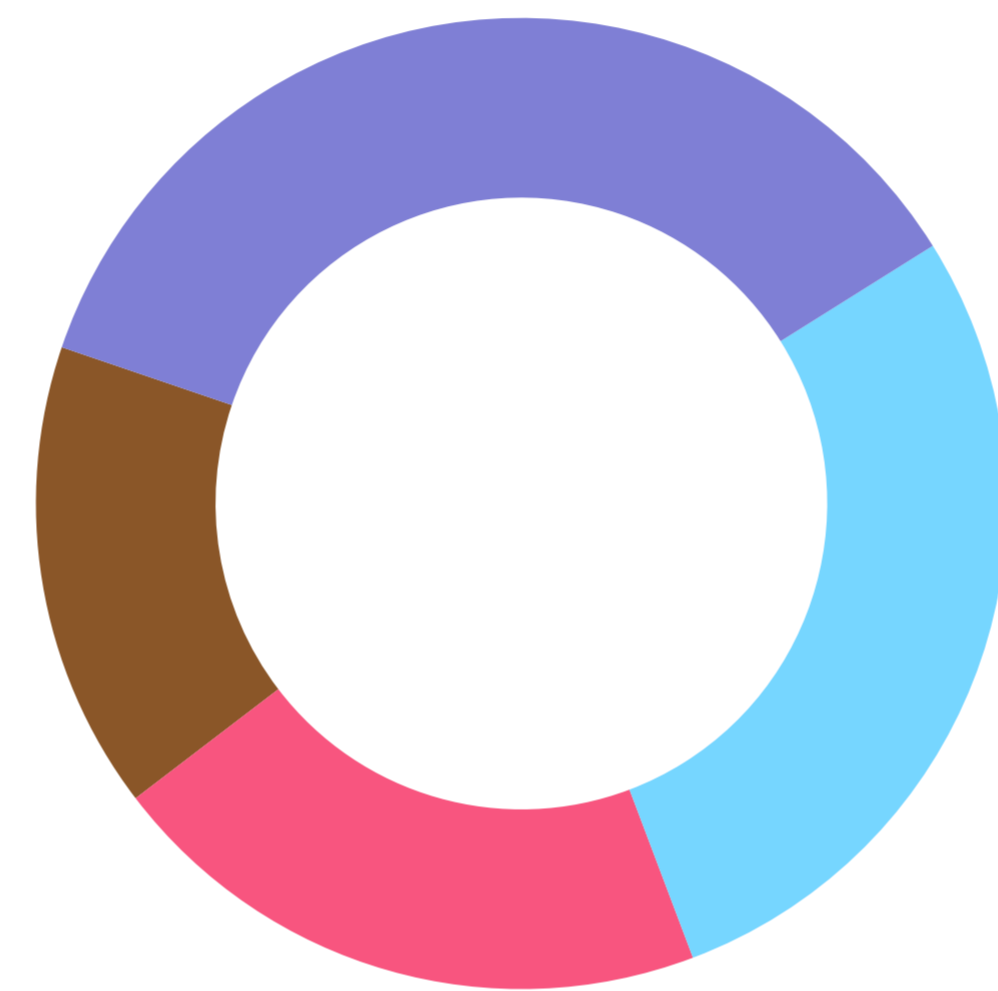


Dried Snacks & Nuts  
35.9%

Biscuits & Crackers  
15.6%

Fruit & Vegetable Chips  
20.4%

Chocolate & Sweets  
28.2%



the Philippines  
17.9%

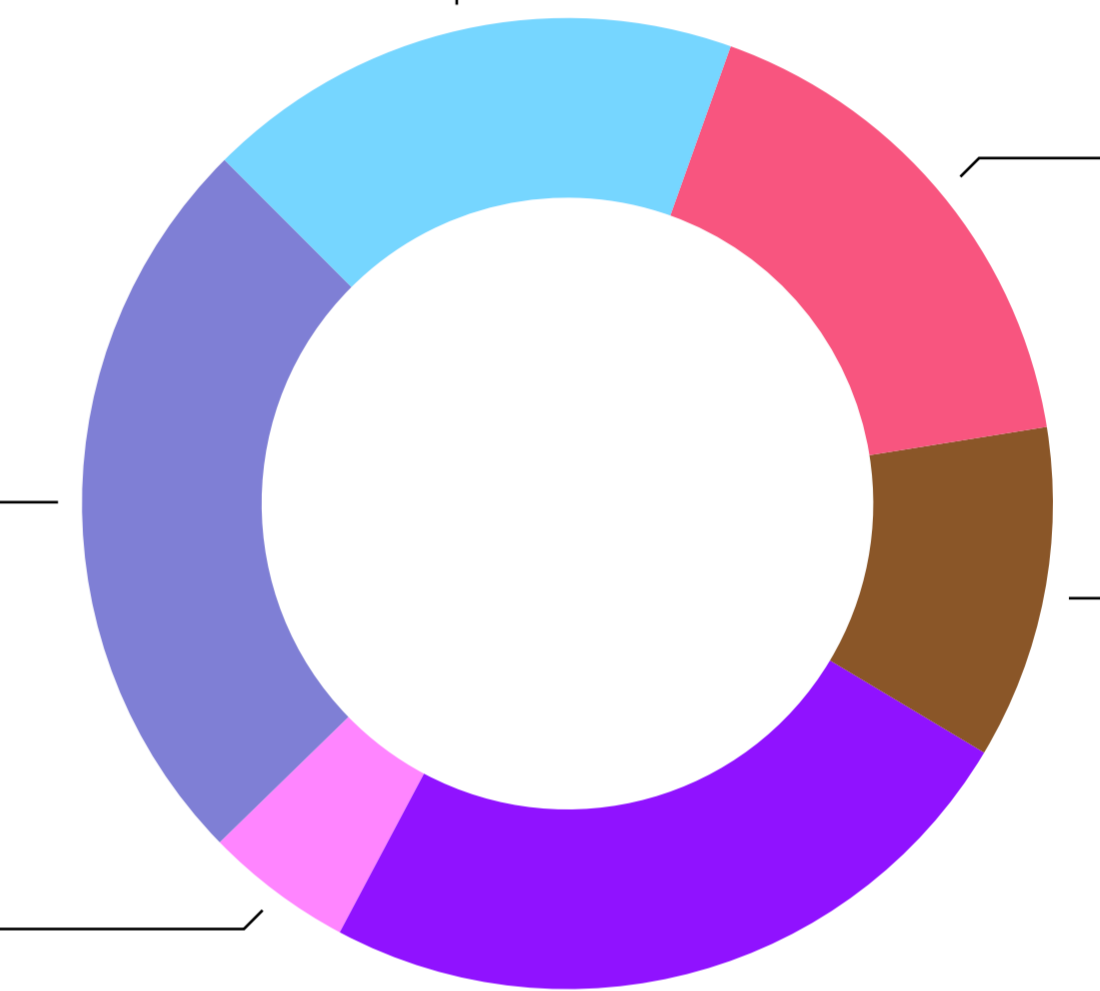
Indonesia  
24.8%

Singapore  
4.9%

Malaysia  
17.0%

Thailand  
11.1%

Vietnam  
24.2%



## TMO Observations:

- Dried fruits and nuts are the category with the largest market size among the 4 categories, accounting for approximately 36% of total snack sales in April.
- The snack categories covered in this report saw the highest sales in **Indonesia and Vietnam** in April 2025, followed by the **Philippines**.

# Snacks - Main Segments

With the growth of the global economy and the diversification of consumer markets, the snack industry is showing strong growth worldwide. This trend is especially evident in Southeast Asia. The region has a large and young population, with rising purchasing power and growing demand for snacks. Consumer preferences are also changing. Demands for healthier snacks—low sugar, low fat, and high fiber—is increasing, providing direction for product innovation.

TMO refers to the classification of the snacks industry and eCommerce market categories, and divides snacks sold in the Southeast Asian online market into the following 4 major categories:

1. **Dried Snacks & Nuts**
2. **Chocolate & Sweets**
3. **Fruit & Vegetable Chips, Potato Chips**
4. **Biscuits & Crackers**

This outlook mainly studies and analyzes the above 4 market segments. Products that do not belong to these categories are not included in the key analysis scope of this report.

## Main Segments

## Subcategories

**Dried Snacks & Nuts** Dried fruits, nuts, dried meat, dried fish, etc.

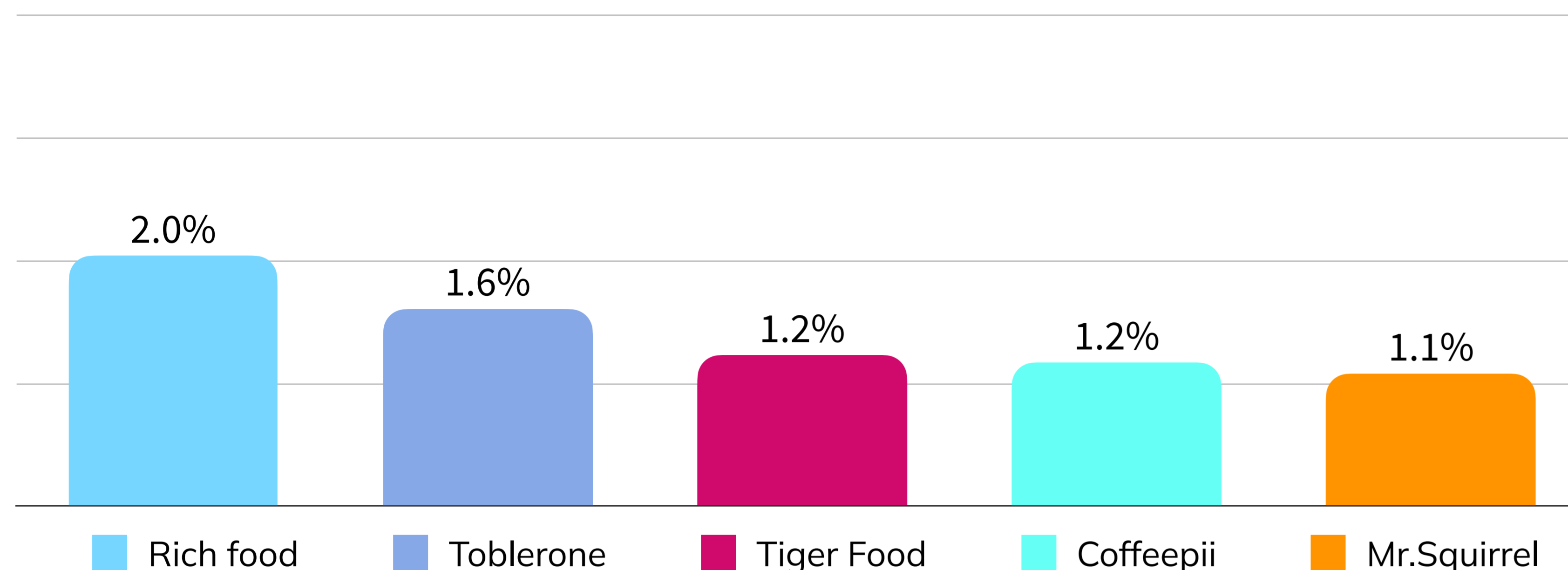
**Chocolate & Sweets** Chocolate, candy, mints, etc.

**Fruit & Vegetable Chips, Potato Chips** Fruit and vegetable chips, potato chips, French fries, etc.

**Biscuits & Crackers** Biscuits, crackers, wafers, etc.

# Snacks - Popular Brands

## Market Share of Popular Brands



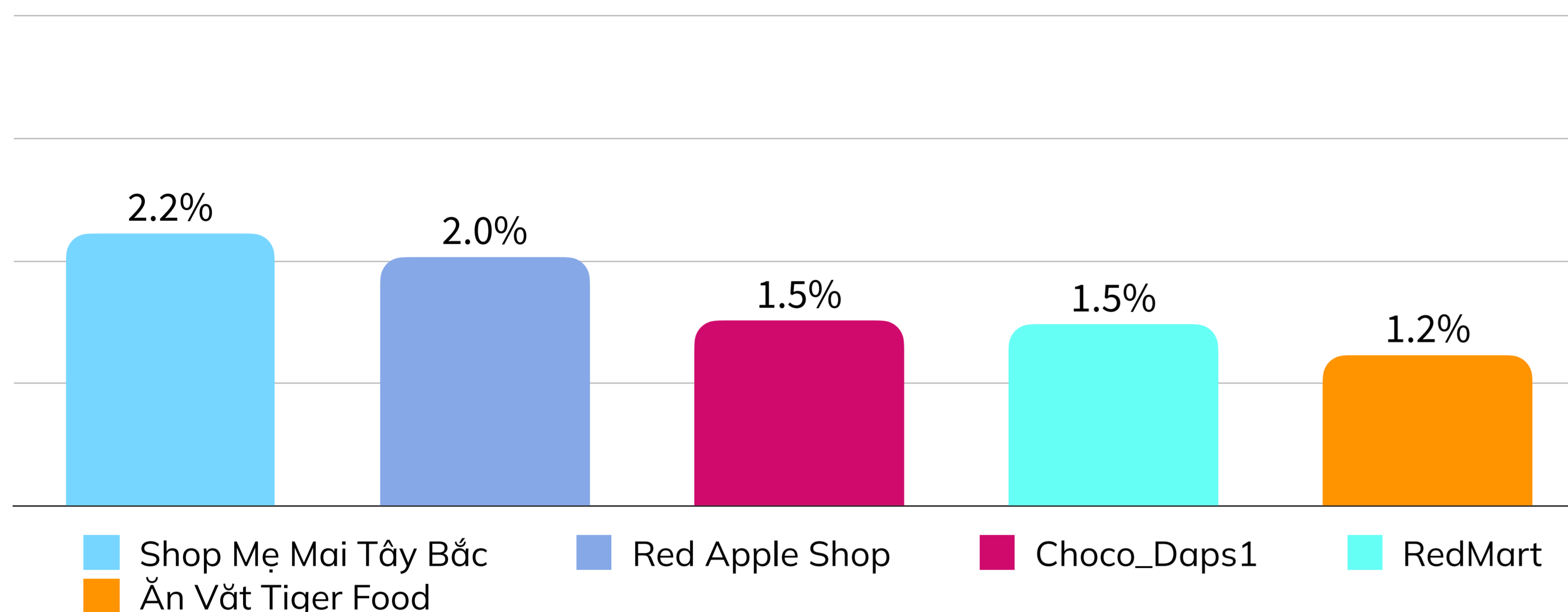
Brand	Origin Country	Hot Category
Rich food	Vietnam	Dried fruit
Toblerone (Mondelēz International)	Switzerland	Chocolate
Tiger Food	Vietnam	Jerky
Coffeepii	Japan	Candy
Mr.Squirrel	Philippines	Dried fruit

### TMO Observations:

- In Southeast Asia’s snack market, the top five brands each hold **less than 2%** market share, indicating low brand concentration and opportunities for new entrants.
- **Vietnam’s Rich Food** leads slightly, with products featuring Xinjiang red dates. **Toblerone (Switzerland)** and **Coffeepii (Japan)** are also popular, showing strong demand for quality imports.
- Toblerone is owned by **Mondelēz International**, which also owns Oreo, Cadbury, and Milka.

# Snacks - Popular Stores

## Market Share of Popular Stores



Stores	Selling Country	Hot Category
Shop Mẹ Mai Tây Bắc	Vietnam	Jerky
Red Apple Shop	Vietnam	Dried fruit
Choco_Daps1	Philippines	Chocolate
RedMart	Singapore	Biscuits
Ăn Vặt Tiger Food	Vietnam	Dried fruit

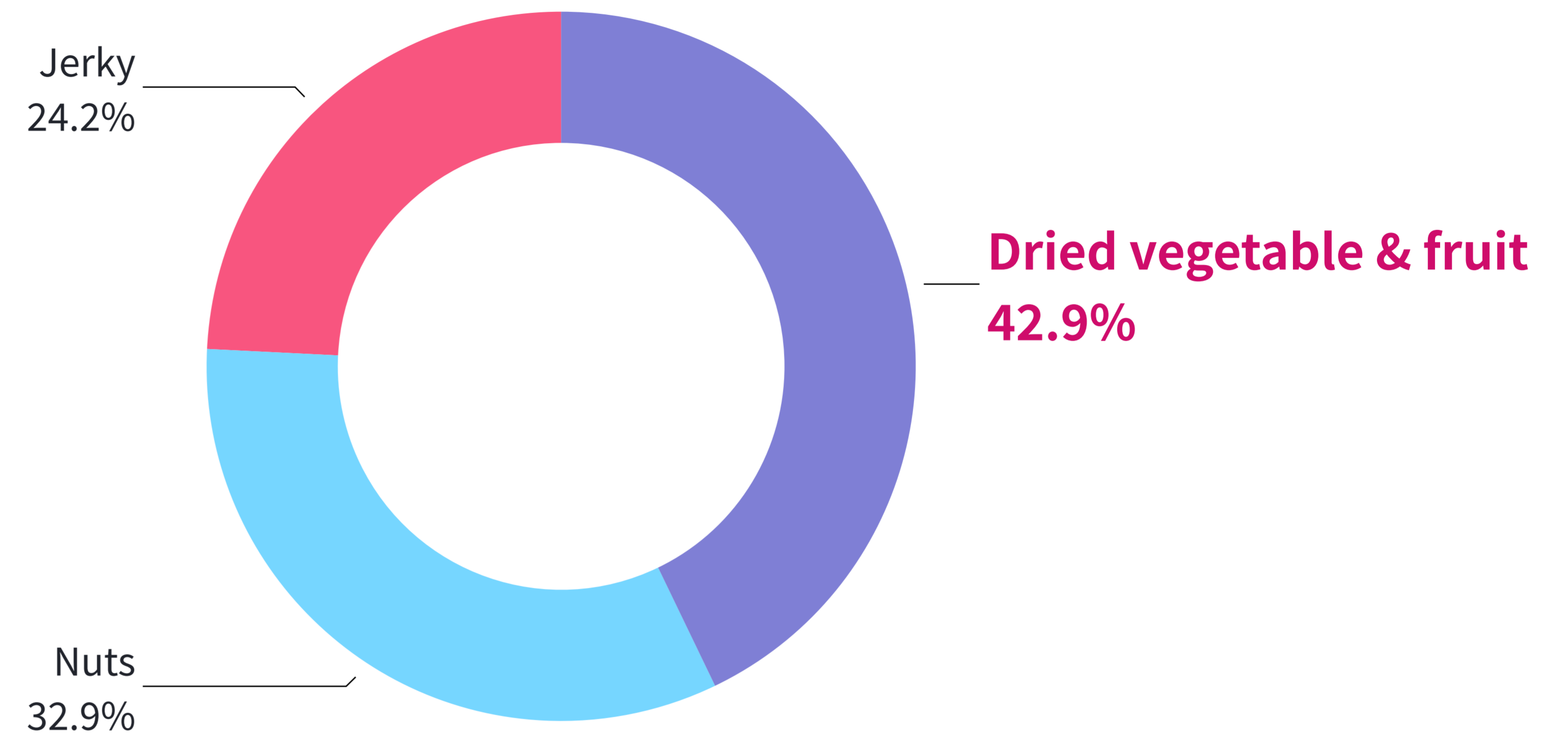
### TMO Observations:

- In the Southeast Asian small appliance e-commerce market, the top five best-selling stores together hold less than 10% market share, and all are local Southeast Asian stores.
- Among them, three are from Vietnam. As previously mentioned, Vietnam ranked just behind Indonesia in total monthly sales share, highlighting the country's active online snack market.
- Data from top brands and stores also shows that dried snacks—such as dried fruits and meat—are especially popular among Southeast Asian consumers.



# **Dried Snacks & Nuts**

# Dried Snacks & Nuts - Hot Subcategories



## TMO Observations:

- Nuts, dried fruits, and jerky are the largest categories in Southeast Asia's snack market. Due to the region's hot and humid climate, dried snacks like nuts, dried fruits, and jerky offer longer shelf life and easier storage.
- Among subcategories, **dried vegetable & fruit** are the top-selling products. Countries like the Philippines, Thailand, and Vietnam are rich in tropical fruits such as mango, pineapple, durian, and banana, providing abundant raw materials for dried fruit production.

# Dried Snacks & Nuts - Best-selling countries by subcategories

## Dried Fruits & Vegetables



- **Vietnam leads in the dried vegetable & fruit category**, accounting for over 45% of sales. It benefits from local fruits like mango, coconut, and jackfruit.
- Younger Vietnamese consumers are increasingly interested in natural, additive-free dried snacks due to growing health awareness.

## Nuts



- **The Philippines leads in nuts**, with over 30% of total category sales. As one of the world's largest nut producers, the country has mature processing technologies for cashews and macadamia nuts.
- Thanks to RCEP tariff reductions, nut import duties from China have dropped by up to 30%, lowering export costs.

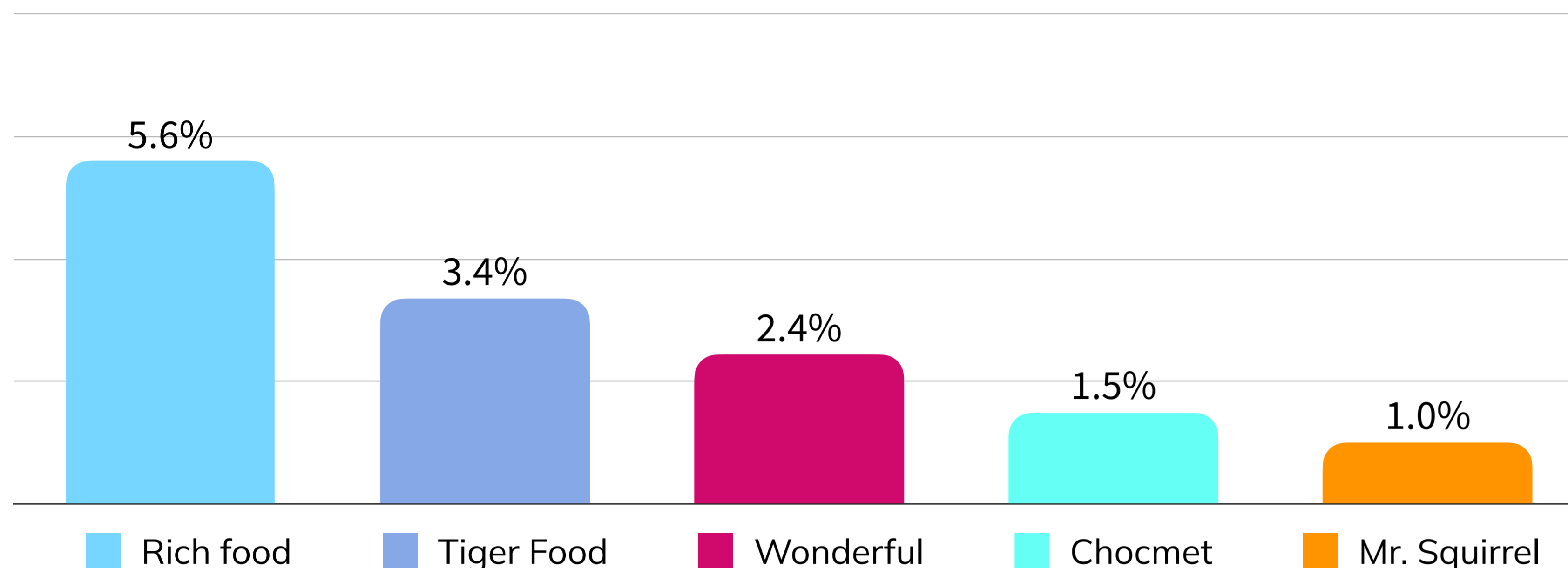
## Jerky



- **Vietnam also leads the jerky category**, taking about 70% of sales.
- Over 40% of the population is aged 15–39, and this group prefers high-protein, ready-to-eat snacks like jerky, which has a high repurchase rate on e-commerce platforms.

# Dried Snacks & Nuts - Popular Brands

## Market Share of Popular Brands



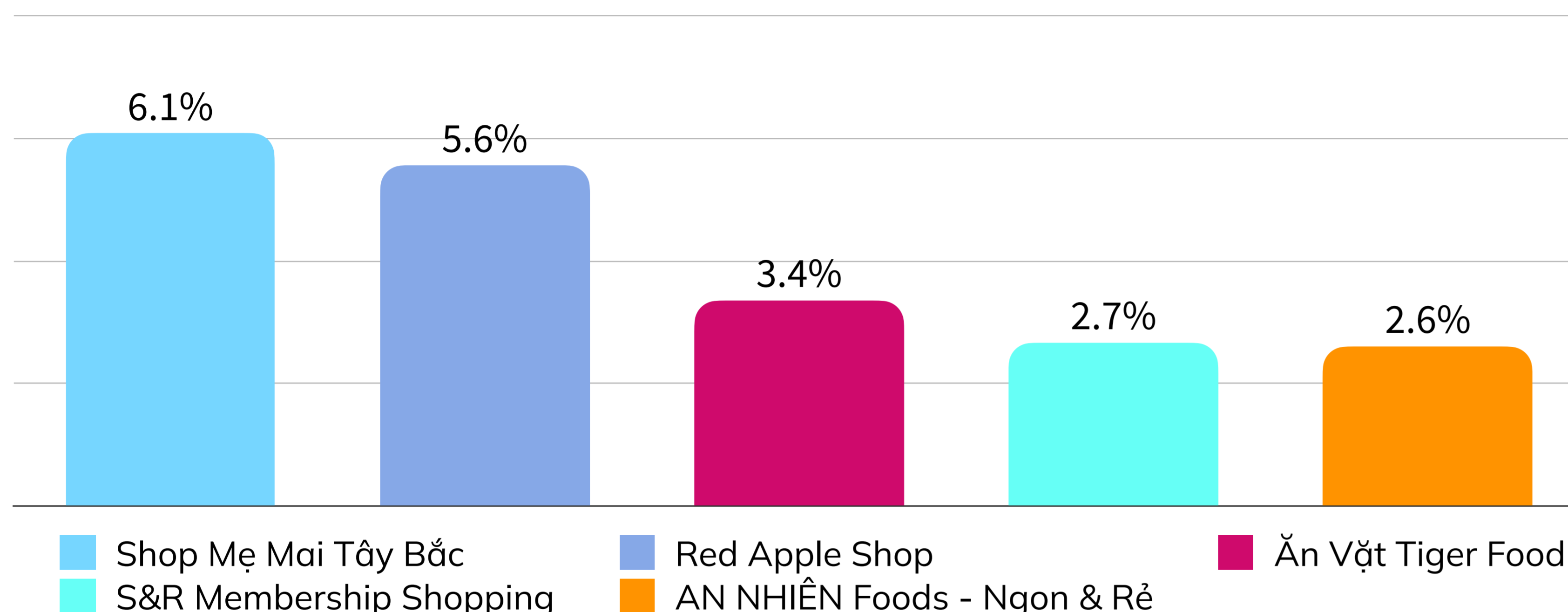
Brand	Origin Country	Hot Category
Rich food	Vietnam	Dried fruit
Tiger Food	Vietnam	Jerky
Wonderful	United States	Nuts
Chocmet	Philippines	Nuts
Mr. Squirrel	Philippines	Dried fruit

## TMO Observations:

- **Top five brands in the dried snacks & nuts category account for only 12.9% of market share**, mostly from Vietnamese and Filipino brands, reflecting the strong presence of local players. Although domestic brands dominate, the market remains fragmented, with no signs of monopoly.
- American brand **Wonderful**, under The Wonderful Company, focuses on California pistachios and almonds and is active in Asia.
- The Philippines and Vietnam are key production hubs for tropical fruits and nuts. Local brands benefit from access to raw materials and in-house processing, enabling lower costs and fresher products. On e-commerce platforms, features like "made-to-order" and "low-temperature drying" are key selling points.

# Dried Snacks & Nuts - Popular Stores

## Market Share of Popular Stores



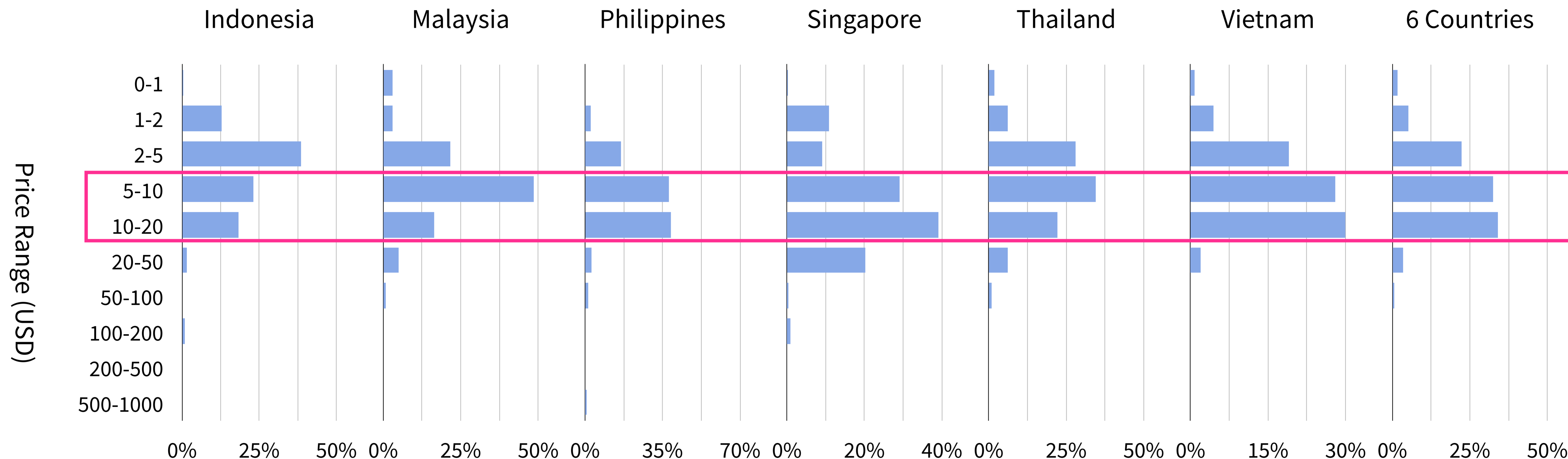
Stores	Selling Country	Hot Category
Shop Mẹ Mai Tây Bắc	Vietnam	Jerky
Red Apple Shop	Vietnam	Dried fruit
Ăn Vặt Tiger Food	Vietnam	Jerky
S&R Membership Shopping	Philippines	Nuts
AN NHIÊN Foods - Ngon & Rẻ	Vietnam	Jerky

## TMO Observations:

- Best-selling stores in the dried snacks & nuts category are also **mainly based in Vietnam and the Philippines**, confirming high consumer demand for these snacks.
- Among the hot-selling categories, **jerky are particularly popular in Vietnam**.
- Popular stores include both **multi-category retailers** (e.g., S&R Membership Shopping, which also sells household goods) and **branded stores**, showing that one-stop shop formats are well received.

# Dried Snacks & Nuts - Price Range

## Share of Revenue by Price Range and Country



The **\$5–\$20** price range represented the core segment of the Dried Snacks & Nuts market in Southeast Asia.

- In **Malaysia and Thailand**, most sales come from the **\$5–10** range.
- In **the Philippines, Vietnam, and Singapore**, the **\$10–20** range accounted for the highest sales.
- In **Indonesia**, **\$2–5** is the key sales range, making it the lowest-price major market.
- In **Singapore**, over 20% of sales come from the **\$20–50** range, reflecting its high purchasing power.

# Dried Snacks & Nuts - Trending New Products



**Brand:** Ganyuan

**Store:** Lanna Store

**Price:** 0.21 USD

**Category:** Food & Beverage > Snacks > Seeds

**Country of Origin:** China

**Selling Country:** Vietnam

**Ingredients:** Nuts, dried fruits, beans, salt, sugar, seasonings, nuts (almonds, cashews, peanuts, macadamia, etc.)

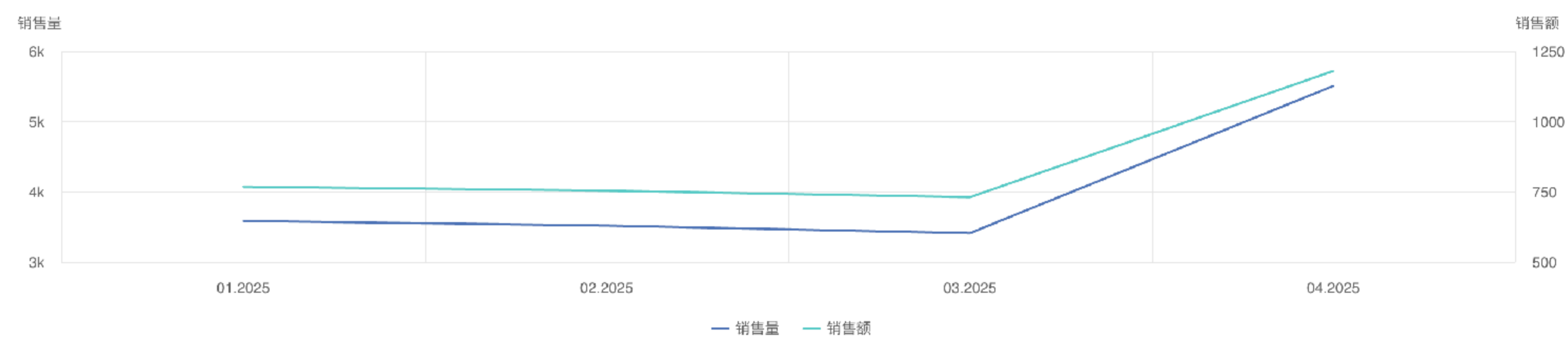
**Target Consumers:** Snack lovers, health-conscious eaters, busy individuals, travelers

**Storage:** Keep in a cool, dry place.


## GAN YUAN FLAVORED MIXED NUTS, KAM YUENS MIXED BEANS, NUTS & DRIED FRUITS

Ganyuan Food, a Chinese snack brand, offers popular products like **Crab Roe Broad Beans** and **Salted Egg Yolk Nuts**. In 2024, it expanded into Southeast Asia, launching **1KG mixed gift packs** to suit local bulk-buying preferences. During Vietnam's typhoon that year, Ganyuan provided **millions-worth of relief supplies** and promoted its efforts via **Shopee livestreams**, boosting brand trust.

### SALES TREND MONITORING - TMO Market Insider



### TITLE TRACKING - TMO Market Insider

产品	Original Title / New Title	Modification Time
	Original Title	
	New Title <b>Gan Yuan Flavored Mixed Nuts, Kam Yuens Mixed Beans, Nuts &amp; Dried Fruits</b>	2025-01-01

# Dried Snacks & Nuts - Trending New Products



**Brand:** Nutrifinds

**Store:** Nutrifinds

**Price:** 16.58 USD

**Category:** Food & Beverage > Snacks > Nuts

**Country of Origin:** Philippines

**Selling Country:** Philippines

**Ingredients:** Nuts, seeds, dried fruits, salt, vegetable oil, etc.

**Target Consumers:** Adults, children

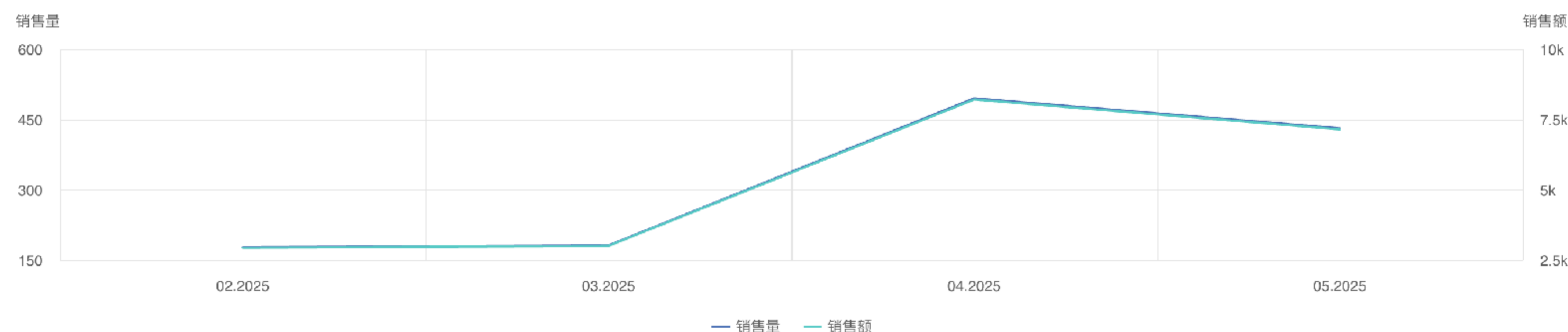
**Usage Scenarios:** On-the-go snacking, healthy snacks, sharing

**Storage:** Store in a cool, dry place.

## NUTRIFINDS® SIGNATURE MIXED NUTS - ASSORTED PACK


Nutrifinds is a **Philippine-based** healthy snack brand, with its flagship product being the **Signature Trail Mix** (a blend of nuts and dried fruits). It emphasizes "**natural & no salt added**" and "**high-protein & healthy**" concepts, making it popular among health-conscious consumers. The **large jar** comes with **free small resealable packs**, enhancing both **cost-effectiveness** and **purchase appeal**.

### SALES TREND MONITORING - TMO



### PRICE TRACKING - TMO

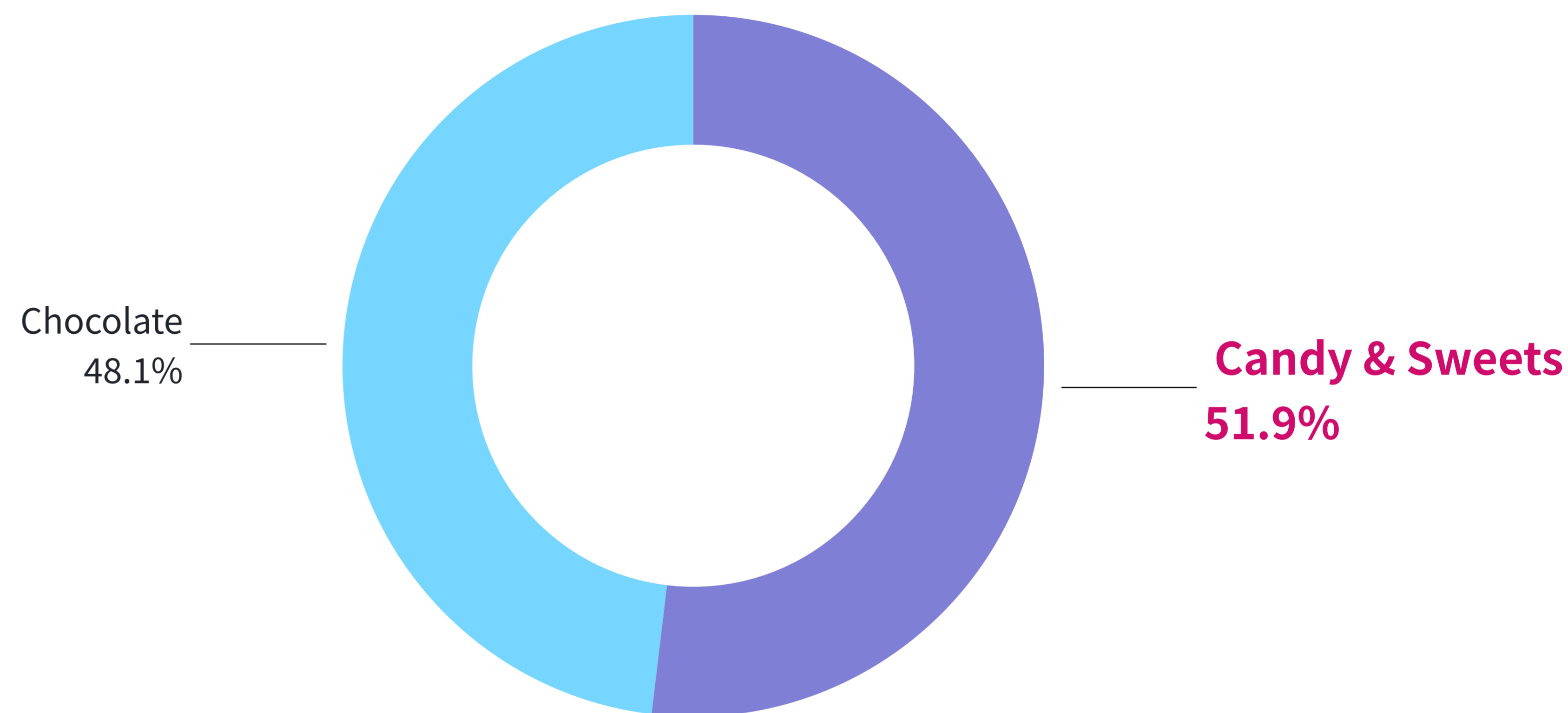
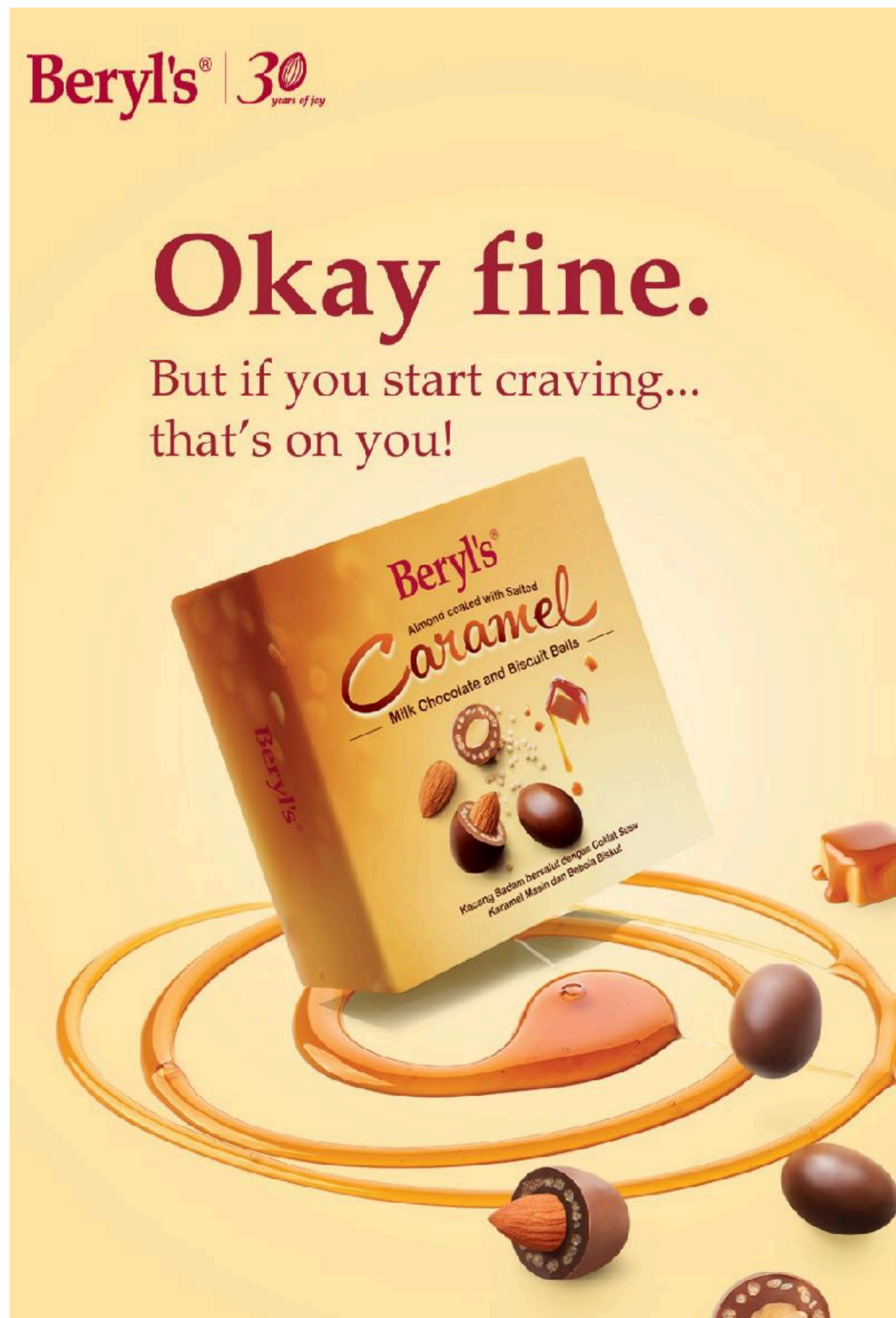


产品	Old Price	New Price	Modification Time
 Nutrifinds® Signature Trail Mix - Bundle	原价	\$10.06	2025-02-17
	价格	\$16.36	
	原价	\$10.06	
	价格	\$16.58 <span style="color: green;">▲ \$0.22</span>	



# **Chocolate & Sweets**

# Chocolate & Sweets - Hot Subcategories



## TMO Observations:

- In the Chocolate & Sweets category, the two subcategories each account for **around 50% of total sales.**
- Chocolate & Sweets are often used as small rewards, stress-relief snacks, or for social sharing. On cross-border eCommerce platforms (Shopee/Lazada Global Mall), imported products in this category are often best-sellers, attracting middle-class and younger buyers.

# Chocolate & Sweets - Best-selling countries by subcategories

## Candy & Sweets



- **Malaysia** leads with **over 25%** of sales among the six countries.
- International brands have launched products tailored to local preferences—such as durian and coconut-flavored candies—leveraging strong traffic from local eCommerce platforms to achieve high conversion.

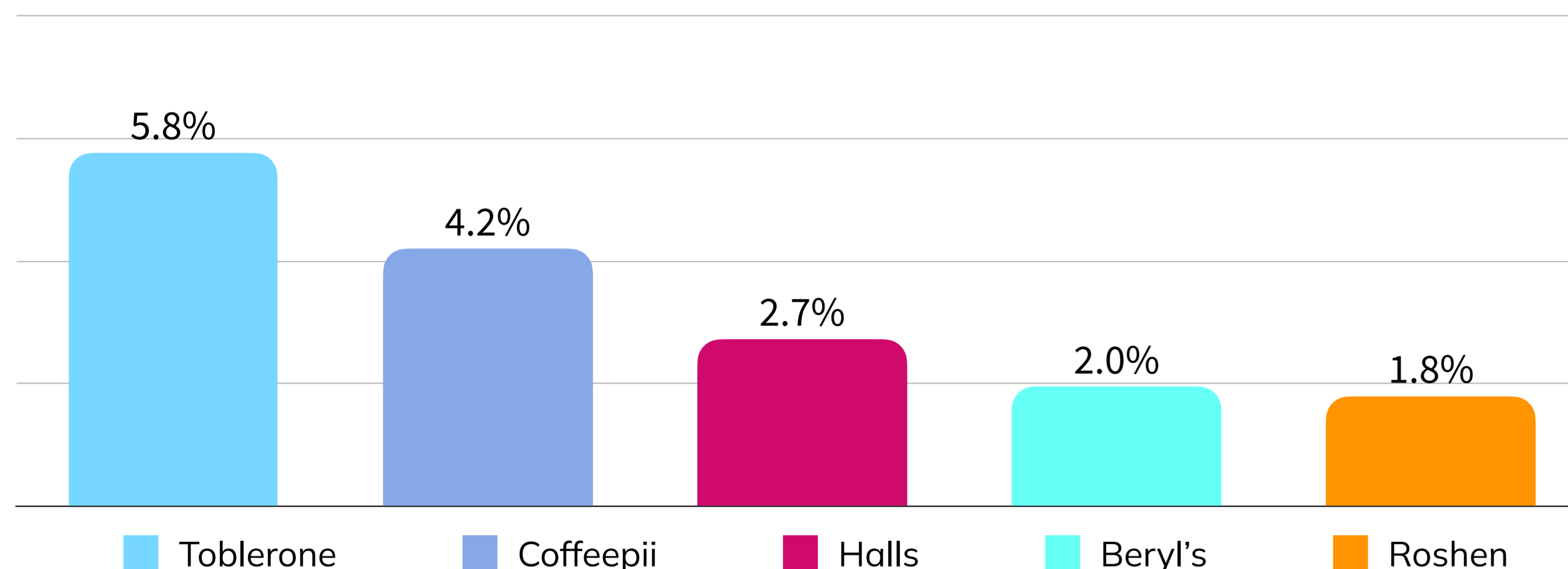
## Chocolate



- In the **chocolate subcategory**, Malaysia again leads with about 26.5% of sales, followed closely by the Philippines at 25%.
- Malaysia's Westernized food culture and long-standing chocolate consumption habits contribute to high acceptance of both imported and local brands. Both countries welcome international brands such as **Hershey's, Ferrero, and Cadbury**, whose presence has boosted overall category sales.

# Chocolate & Sweets - Popular Brands

## Market Share of Popular Brands



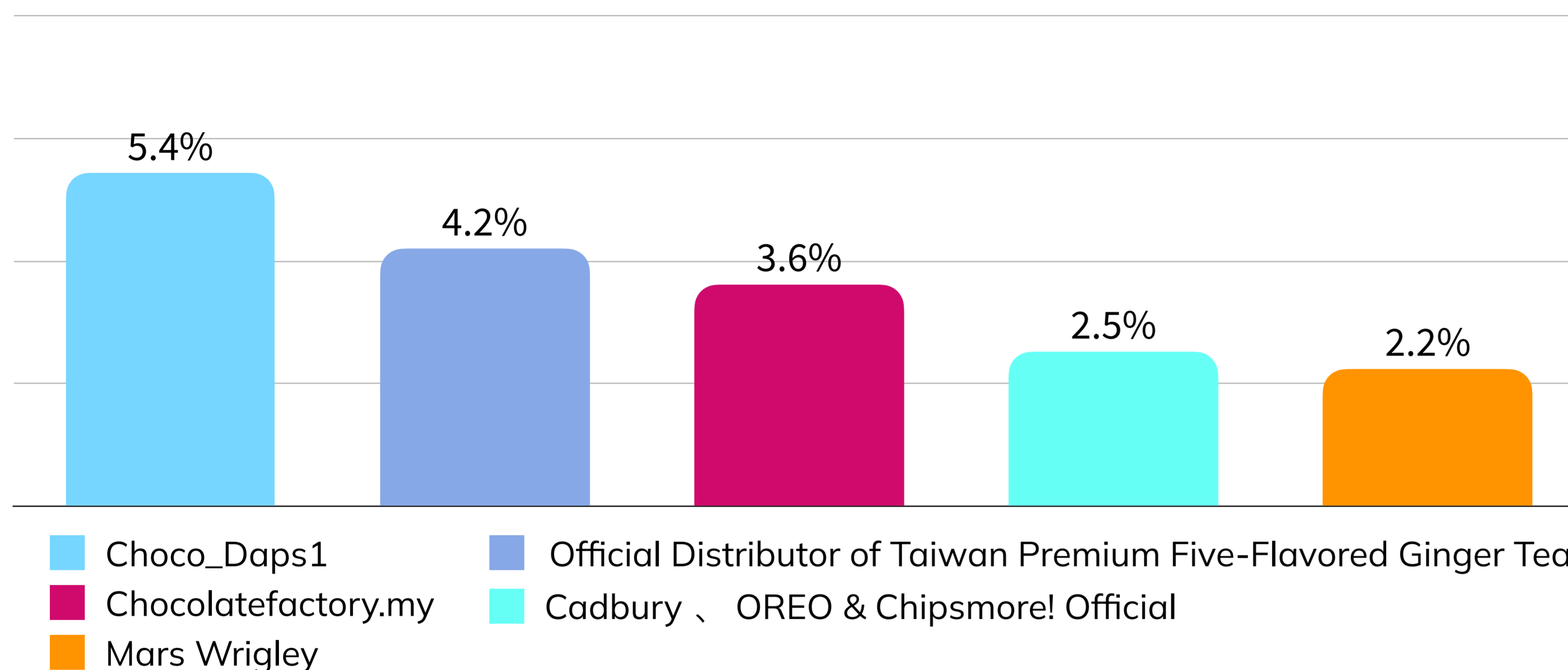
Brand	Origin Country	Hot Category
Toblerone (Mondelēz International)	Switzerland	Chocolate
Coffeepii	Japan	Candy
Halls (Mondelēz International)	United Kingdom	Candy
Beryl's	Malaysia	Chocolate
Roshen	Ukraine	Candy & Sweets

### TMO Observations:

- Imported brands from **Europe and Japan** are particularly favored in Southeast Asia. Swiss brand **Toblerone**, known for its triangular chocolate, leads the online market with a 5.8% share. Japan's **Coffeepii** ranks second.
- The top five brands in this segment together account for less than 20% of sales, indicating low brand concentration. Other popular international brands in the top 20 include **Ferrero Rocher (Italy)**, **Lotte (South Korea)**, and **Skittles (USA)**, showing this category is a key entry point for global players.

# Chocolate & Sweets - Popular Stores

## Market Share of Popular Stores



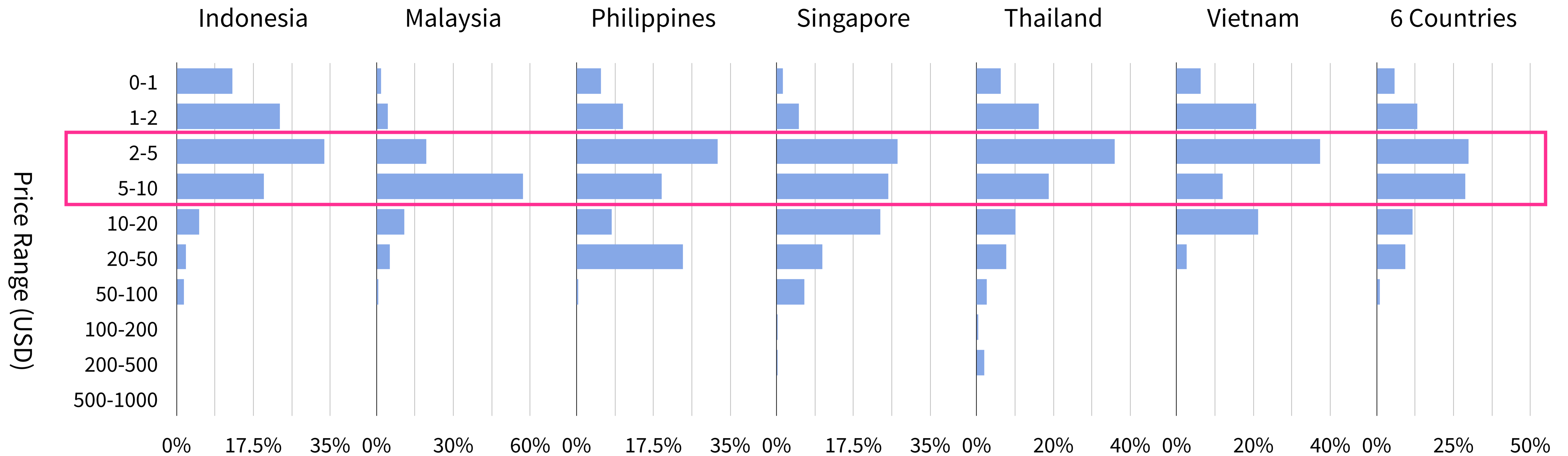
Stores	Selling Country	Hot Category
Choco_Daps1	Philippines	Chocolate
Official Distributor of Taiwan Premium Five-Flavored Ginger Tea	Malaysia	Candy & Sweets
Chocolatefactory.my	Malaysia	Chocolate
Cadbury, OREO & Chipsmore! Official	Malaysia	Candy & Sweets
Mars Wrigley	Multiple Southeast Asian countries	Candy & Sweets

### TMO Observations:

- The top 5 stores combined hold less than 20% market share, indicating no dominant brand exists in this category—creating opportunities for cross-border players.
- The top three stores are multi-brand, multi-category sellers, showing that this “one-stop shop” format is welcomed by snack consumers.
- **Cadbury, OREO & Chipsmore! Official** is an official flagship store operated or authorized by **Mondelēz International** (parent company of Cadbury, Oreo, etc.). **Mars Wrigley**, a division of U.S.-based Mars, Incorporated, runs a store featuring M&M’s, Snickers, and other well-known products.

# Chocolate & Sweets - Price Range

## Share of Revenue by Price Range and Country



The **\$2-\$5** price range represented the core segment of the Chocolate & Sweets market in Southeast Asia.

- In **Indonesia, the Philippines, Thailand, and Vietnam and Singapore**, products in the **\$2-5** price range accounted for the highest sales.
- In **Malaysia**, products in the **\$5-10** price range performed best, with a more concentrated price distribution.
- **Singapore** shows more evenly distributed sales across all price ranges, especially between **\$2-20**.

# Chocolate & Sweets - Trending New Products

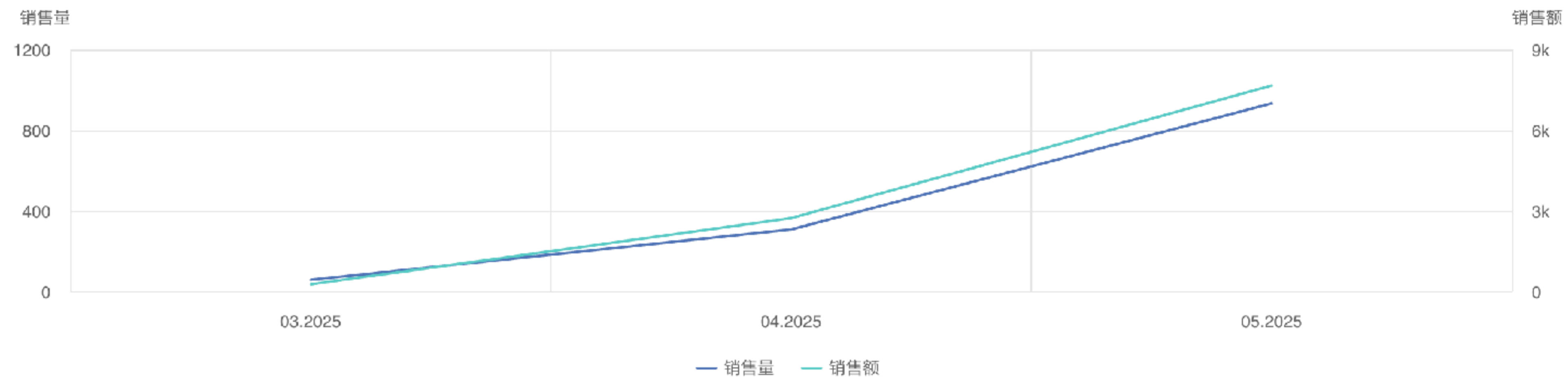


**Brand:** Beryl's  
**Store:** byHaerina  
**Price:** \$8.21  
**Category:** Food & Beverage > Snacks > Chocolate  
**Country of Origin:** Malaysia  
**Selling Country:** Malaysia  
**Ingredients:** Cocoa, Almonds, Sugar, Milk Solids, Emulsifier, Vanilla, etc.  
**Occasions:** Birthdays, weddings, engagements, special events  
**Storage:** Store in a cool, dry place.

## CHOCOLATE BIRTHDAY GIFT | HOMEMADE BERYL'S ALMOND CHOCOLATE | WEDDING GIFT | ENGAGEMENT GIFT 12, 21, 42 PCS

Beryl's, a premium local chocolate brand from Malaysia founded in 1995, is known for its high-quality cocoa and Southeast Asian-inspired flavors. It performs well in both the domestic gift market and exports. The **Almond Chocolate** is the brand's best-selling product, part of its "Nuts + Chocolate" line.

### SALES TREND MONITORING - TMO Market Insider



### TITLE TRACKING - TMO Market Insider

产品	Original Title / New Title	Modification Time
	Original Title	
	New Title	Chocolate Birthday Gift   Homemade Beryl's Almond Chocolate   Wedding gift   Engagement gift 12, 21, 42 pcs 2025-01-01
	Original Title	Chocolate Birthday Gift   Homemade Beryl's Almond Choc   Hantaran kahwin   Bertunang <del>12, 21, 42 pcs</del> 2025-03-19
	New Title	Chocolate Birthday Gift   Homemade Beryl's Almond Choc   Hantaran kahwin   Bertunang

# Chocolate & Sweets - Trending New Products



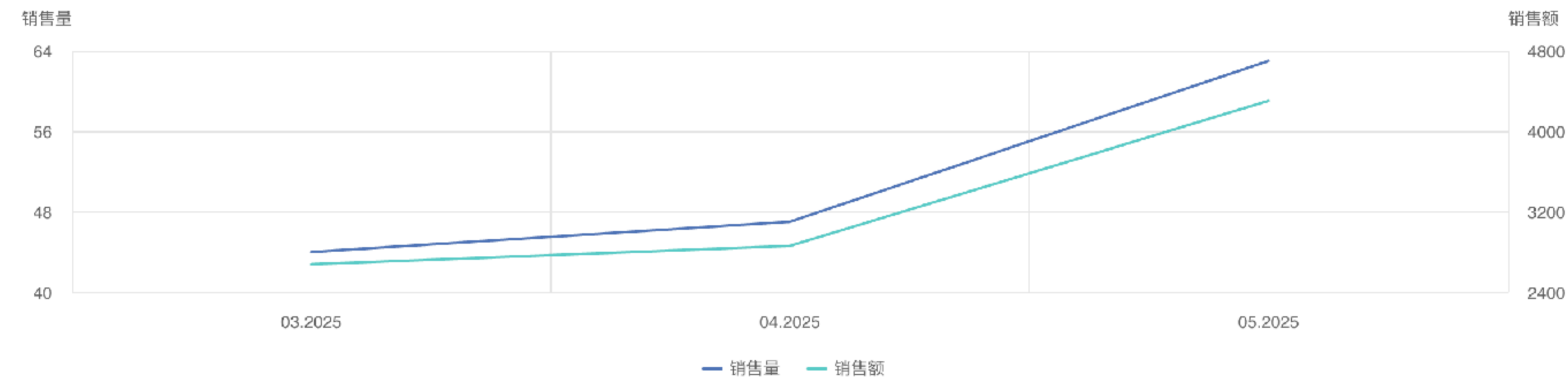
Callebaut 811 Dark Chocolate Callets 2.5 kg

## CALLEBAUT BELGIAN CHOCOLATE DARK CALLETS 811 (2.5 KG BAG)



**Callebaut**, founded in 1911 in Belgium, is a well-known professional chocolate brand and a global supplier of chocolate ingredients, serving bakers, pastry chefs, chocolatiers, and the food service industry.

**Brand:** Callebaut  
**Store:** Gourmet Baking MNL  
**Price:** \$68.29  
**Category:** Food & Beverage > Snacks > Chocolate  
**Country of Origin:** Belgium  
**Selling country:** Philippines  
**Ingredients:** Cocoa, sugar, emulsifier (soy lecithin), natural vanilla flavor, cocoa mass, etc.  
**Usage:** Pastry, chocolate making, desserts, baking  
**Storage:** Store in a cool, dry place.

### SALES TREND MONITORING - TMO Market Insider



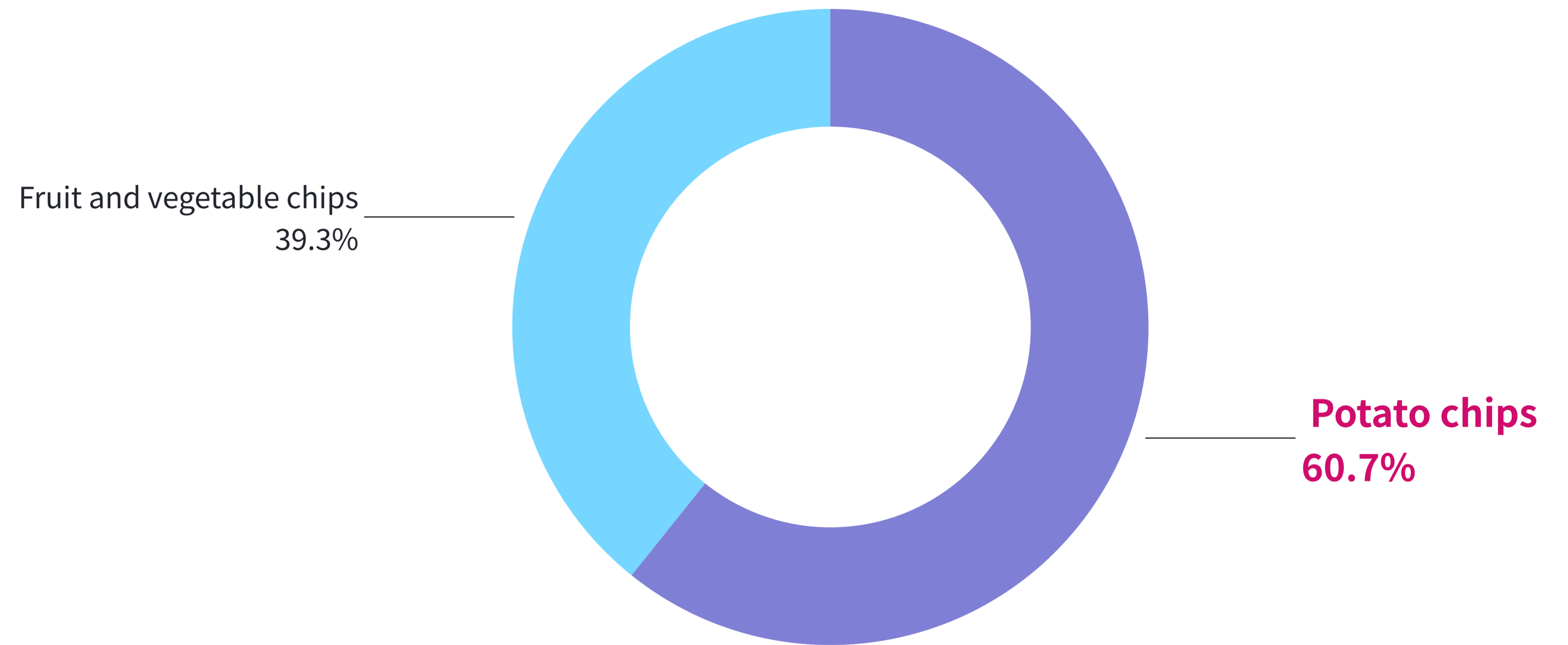
### ON - SHELF TRACKING - TMO Market Insider

产品	Type	Modification Time	价格
 Callebaut Belgian Chocolate Dark Callets 811 (2....	On-shelf	2025-02-01	\$60.86
 Callebaut Belgian Chocolate Dark Callets 811 (2....	On-shelf	2025-02-17	\$60.86



# **Fruit & Vegetable Chips, Potato Chips**

# Fruit & Vegetable Chips, Potato Chips - Hot Subcategories



## TMO Observations:

- In the **fruit & vegetable chips** and **potato chips** subcategories, traditional potato chips remain popular, accounting for over 60% of sales in the month.
- Southeast Asians increasingly prefer **low-calorie, high-fiber, additive-free** alternatives to traditional sugary and fatty snacks. Fruit and vegetable chips, which retain some of the original nutritional value and often carry “non-fried” labels, are becoming a preferred option. In addition to common varieties, local favorites like **jackfruit, bitter melon, cassava, chili, and durian** chips are also popular.

# Fruit & Vegetable Chips, Potato Chips

## - Best-selling countries by subcategories

### Potato Chips

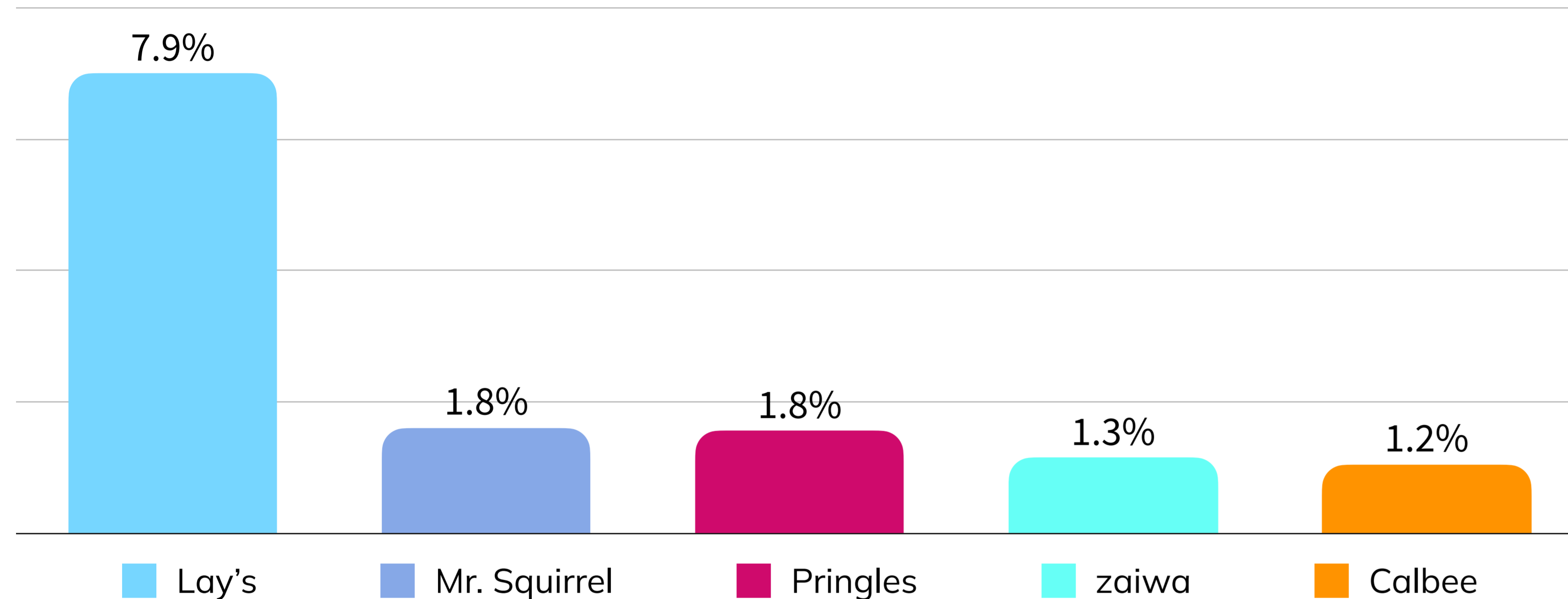
- In the **potato chips** subcategory, **Indonesia leads with over 45%** of total sales across six countries.
- As the most populous country in the region with a large youth population, Indonesia's consumers are a key force in online snack shopping. Local and international brands achieve success by **localizing flavors**, pricing, and packaging.

### Fruit & Vegetable Chips

- In the **fruit & vegetable chips** subcategory, **Indonesia also leads with over 35%** share, followed by Malaysia and the Philippines.
- As Indonesia's middle class expands, consumers show growing interest in healthy, natural food options. These chips often highlight labels such as 'no additives,' 'low fat,' and 'high fiber,' which appeal to younger consumers.

# Fruit & Vegetable Chips, Potato Chips - Popular Brands

Market Share of Popular Brands



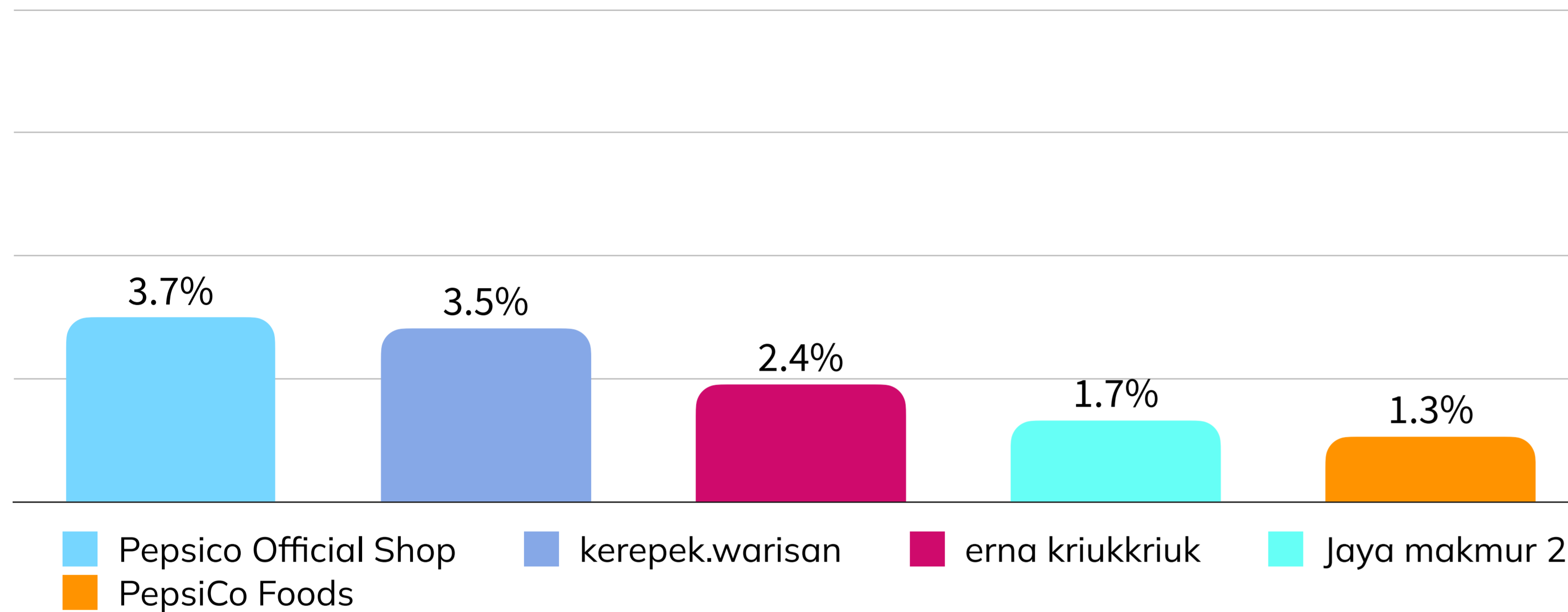
	Brand	Origin Country	Hot Category
1	Lay's (PepsiCo)	United States	Potato Chips
2	Mr. Squirrel	Philippines	Fruit & Vegetable Chips
3	Pringles (Kellogg's)	United States	Potato Chips
4	zaiwa	Malaysia	Potato Chips
5	Calbee	Japan	Potato Chips

## TMO Observations:

- **Lay's**, a brand under PepsiCo, is the top-selling brand in this category in Southeast Asia's online market, and the only brand with a **market share over 5%**.
- Other international brands like **Pringles and Calbee** also perform well, particularly in the potato chips subcategory. These brands have introduced **localized flavors** based on Southeast Asian preferences, such as Lay's Thai Spicy, Hainanese Chicken Rice, and Vietnamese Spring Roll flavors
- In high-income markets like Malaysia, Singapore, and Thailand, imported chips are often seen as premium snacks, and consumers are willing to pay more for well-known brands.

# Fruit & Vegetable Chips, Potato Chips - Popular Stores

## Market Share of Popular Stores



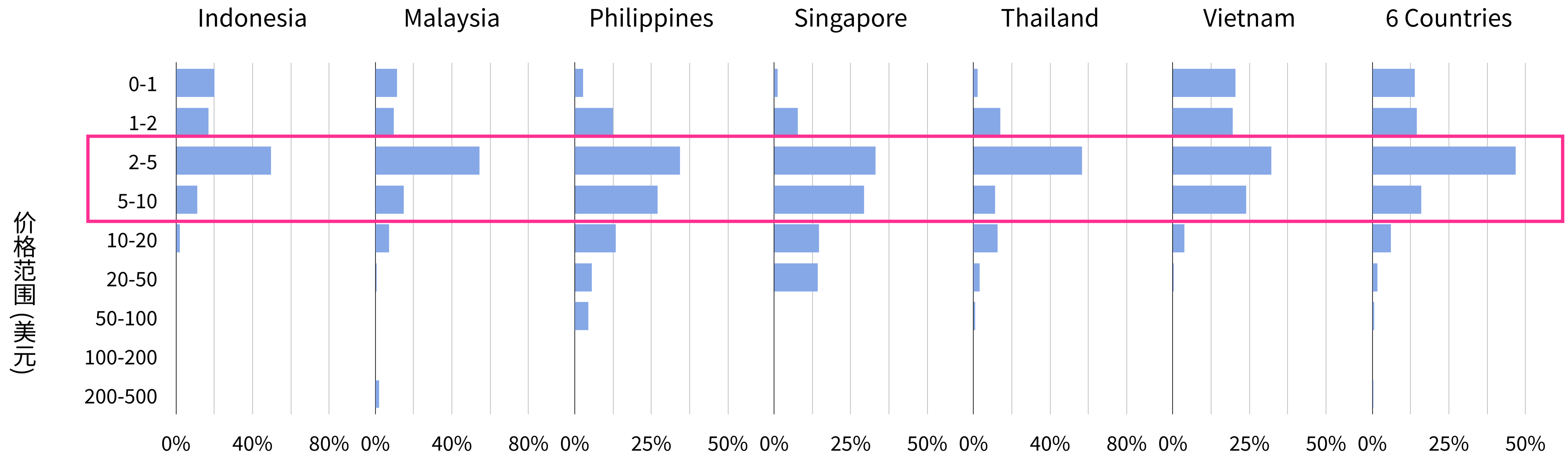
Stores	Selling Country
Pepsico Official Shop	Thailand
kerepek.warisan	Malaysia
erna kriukkriuk	Malaysia
Jaya makmur 2	Indonesia
PepsiCo Foods	Vietnam

## TMO Observations:

- **PepsiCo Official Shop**, the authorized flagship store for PepsiCo products, ranked No.1 in monthly sales in this category, but only led by a narrow margin of 0.2% over the second-ranked store. On **Shopee Mall Thailand**, the store is operated by PepsiCo or its authorized distributors and sells authentic products under brands like Lay's.
- The second and third-ranked stores mainly sell **unbranded or white-label products**, appealing to consumers with bulk packaging, low prices, freshness, and locally sourced ingredients.

# Fruit & Vegetable Chips, Potato Chips - Price Range

## Share of Revenue by Price Range and Country



Across the six countries, **products priced between \$2-\$10** are the most popular in this category.

- The **\$2-\$5 range** accounts for **46% of total sales**, showing that these snacks are more affordable compared to categories like nuts and chocolate.
- In **Malaysia, the Philippines, Singapore, and Vietnam**, **\$2-\$5** is the best-selling range on Shopee and Lazada.
- In **Indonesia and Thailand**, **\$1-\$5** products perform better, reflecting lower average prices in these two countries.

# Fruit & Vegetable Chips, Potato Chips - Trending New Products

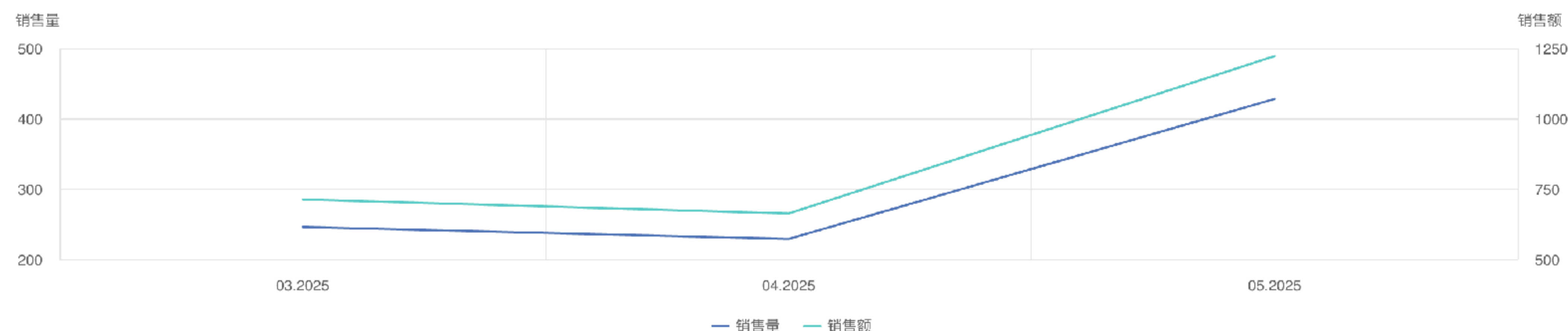


**Brand:** Lay's  
**Store:** Big C Official Shop  
**Price:** \$2.85  
**Category:** Food & Beverage > Snacks > Chips & Crisps  
**Country of Origin:** USA  
**Selling country:** Thailand  
**Ingredients:** Potatoes, squid chili seasoning, vegetable oil, sugar, salt, spices, flavor enhancer, maltodextrin, citric acid, etc.  
**Usage:** Sharing with friends & family, On-the-go snacking, Lunchbox





## LAY'S ROCK CRISPY WAVY POTATO CHIPS HOT CHILI SQUID FLAVOR 40 G. PACK 6 (ONLY AVAILABLE IN THAILAND)

Lay's, a global brand under PepsiCo, has built a strong presence in Southeast Asia through its brand power, localized strategy, and innovative marketing. It customizes flavors for local preferences, such as "Spicy Seafood" and "Tom Yum" in Thailand. The **Hot Chili Squid flavor** was developed specifically for Southeast Asian markets.

### SALES TREND MONITORING - TMO Market Insider



### IMAGE TRACKING - TMO Market Insider

Product Title	Original Image / New Image	Modification Time
Lay's Rock Crispy Wavy Potato Chips Hot Chili Squid Flavor 40 g. Pack 6	 	2025-02-01
Lay's Rock Crispy Wavy Potato Chips Hot Chili Squid Flavor 40 g. Pack 6	 	2025-04-18

# Fruit & Vegetable Chips, Potato Chips - Trending New Products



**KRIPIK SINGKONG**  
RASA SAMBAL BALADO | 2,5 kg

1 PC

**Brand:** TES

**Store:** Golden Snack Official

**Price:** \$7.69

**Category:** Food & Beverage > Snacks > Cassava Chips & Crisps

**Country of Origin:** Indonesia

**Selling Country:** Indonesia

**Ingredients:** Cassava, chili, vegetable oil, sugar, salt, spices, etc.

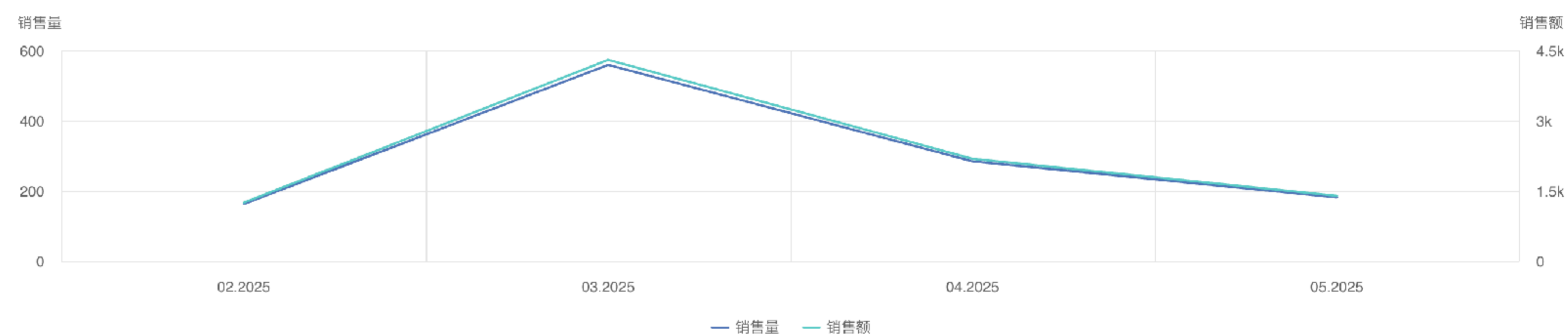
**Usage:** Snacking, Parties, Travel

**Storage:** Store in a cool, dry place away from direct sunlight.

## TES BARADO (TRADITIONAL SPICY) FLAVORED CASSAVA CHIPS (2.5KG)

TES is a well-known local snack brand in Indonesia under **PT. Acefood Industrial Corporation**. It specializes in traditional Indonesian flavors in products like potato and cassava chips. With affordable pricing, authentic taste, and large pack sizes, TES is widely popular both offline and on platforms like Shopee and Tokopedia.

### SALES TREND MONITORING - TMO Market Insider



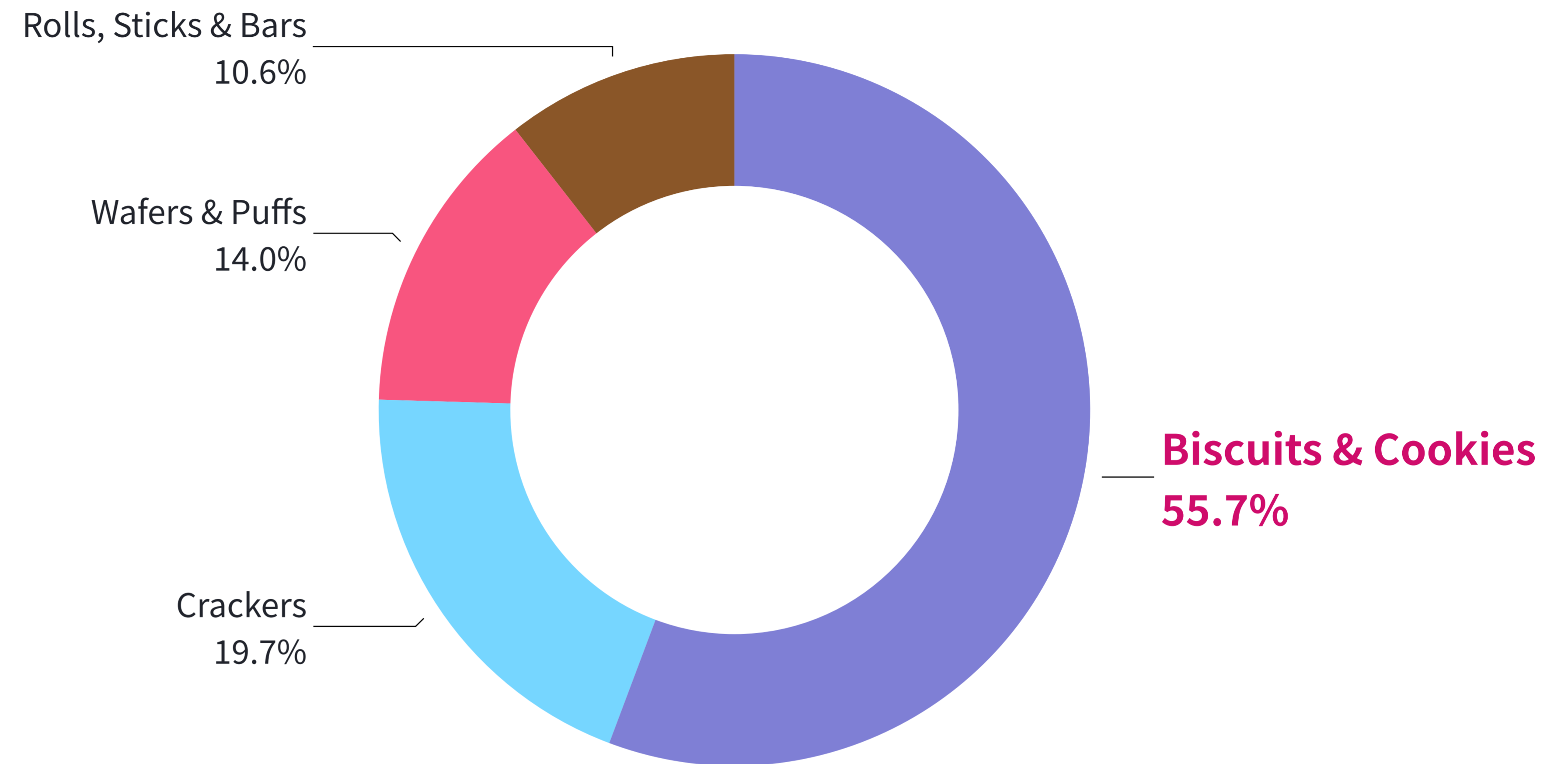
### TITLE TRACKING - TMO Market Insider

产品	Original Title / New Title	Modification Time
	Original Title	2025-01-01
	New Title <b>TES Cassava Chips Balado Flavor 2.5 kg</b>	2025-01-01
	Original Title <b>TES-KRIPIK-SINGKONG 2.5 KG SAMBAL-BALADO</b>	2025-05-26
	New Title <b>Tes Kripik Singkong 2.5 Kg Sambal Balado Renyah Pedas</b>	2025-05-26



# **Biscuits & Crackers**

# Biscuits & Crackers - Hot Subcategories



## TMO Observations:

- In the **biscuits and crackers** category, sweet biscuits (e.g., cookies) have the highest share, accounting for over **50%** of sales.
- **Crackers** rank second, close to **20%**. Other popular subcategories include wafers, puffs, biscuit rolls, and sticks, reflecting the variety of biscuit products available online and consumers' preference for diverse snack formats.

# Biscuits & Crackers

## - Best-selling countries by subcategories

### Biscuits & Cookies



- **Vietnam leads** with nearly **20%** of total sales among the six countries, followed by **Malaysia**.
- Consumers prefer soft and sweet biscuits with creamy or chocolate fillings. Gift-giving is popular during festivals like Tết (Vietnamese New Year), and brands such as **Danisa**, **Cosy**, and **Oreo** are top choices for cookie gift boxes.

### Wafers & Puffs



- In **wafers and puffs**, **Indonesia leads**, accounting for over **60%** of sales.
- These products are typically sold in individually wrapped formats within larger bags, making them suitable for family sharing and portioned consumption, which fits well with Indonesia's household consumption habits.

### Crackers



- For **crackers**, the **Philippines** dominates, with over **50%** share.
- Filipino consumers prefer cheese, salted butter, and savory flavors, which align well with the taste profile of crackers. Local brand **Jack 'n Jill** offers multiple popular products such as **Dewberry**, **Magic Flakes**, and **Chiz Curls**.

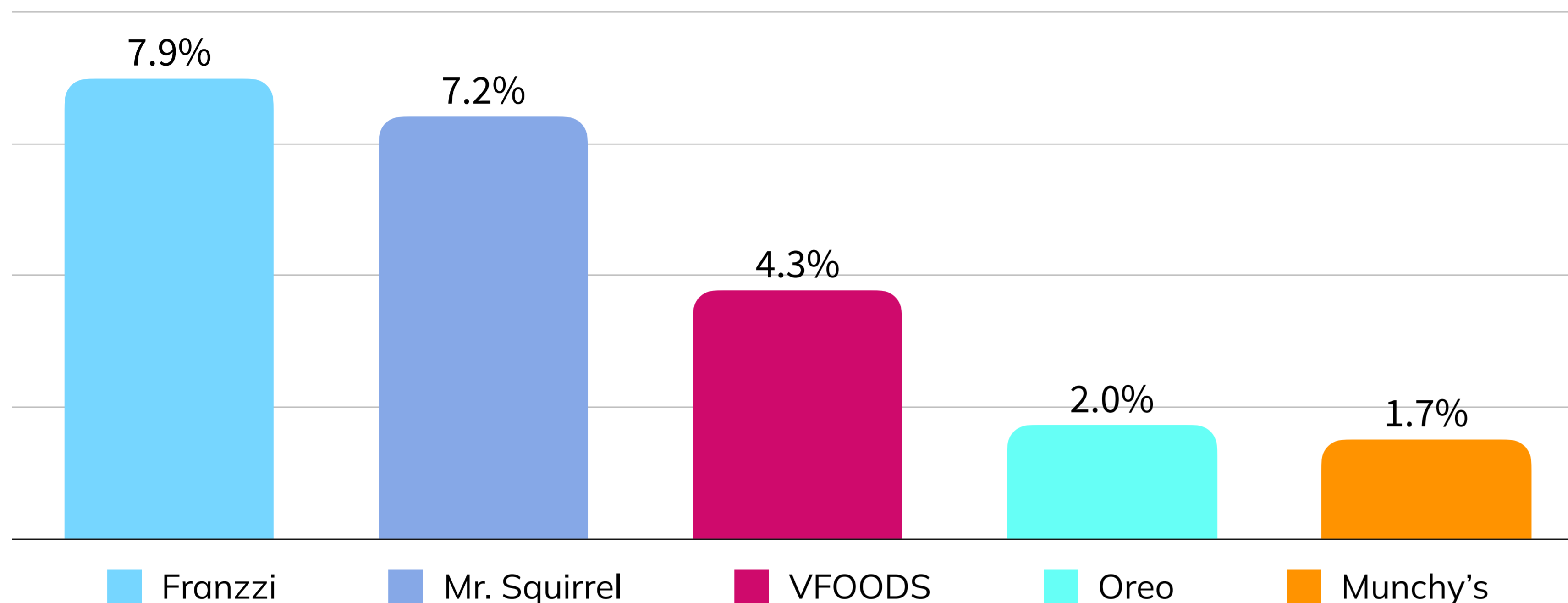
### Rolls, Sticks & Bars



- In **biscuit rolls, sticks and bars**, **Vietnam ranks first** with over **40%** market share, followed by **Thailand** and **Indonesia**.

# Biscuits & Crackers - Popular Brands

Market Share of Popular Brands



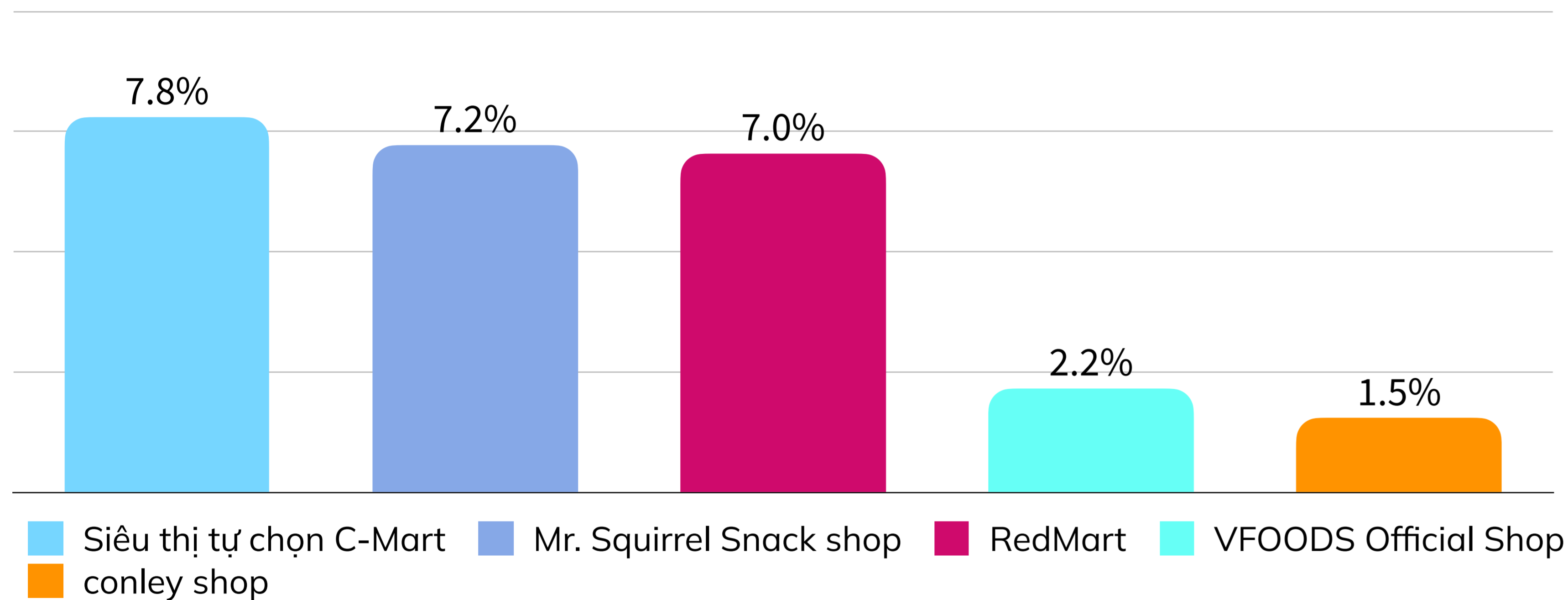
	Brand	Origin Country	Hot Category
1	Franzzi	China	Biscuits & Cookies
2	Mr. Squirrel	Philippines	Biscuits & Cookies
3	VFOODS	Thailand	Biscuits & Cookies
4	Oreo (Mondelēz International)	United States	Biscuits & Cookies
5	Munchy's	Malaysia	Biscuits & Cookies

## TMO Observations:

- Franzzi (Chinese brand), is the top-selling biscuit brand. It focuses on creative cookie flavors like cheese chocolate, scallion chocolate, matcha mousse, and sea salt scallion. Its trendy branding appeals to young consumers seeking variety and novelty.
- **Oreo** (USA) also performs well in this category, while most other top brands are local to Southeast Asia, such as **VFOODS** (Thailand) and **Munchy's** (Malaysia).

# Biscuits & Crackers - Popular Stores

Market Share of Popular Stores



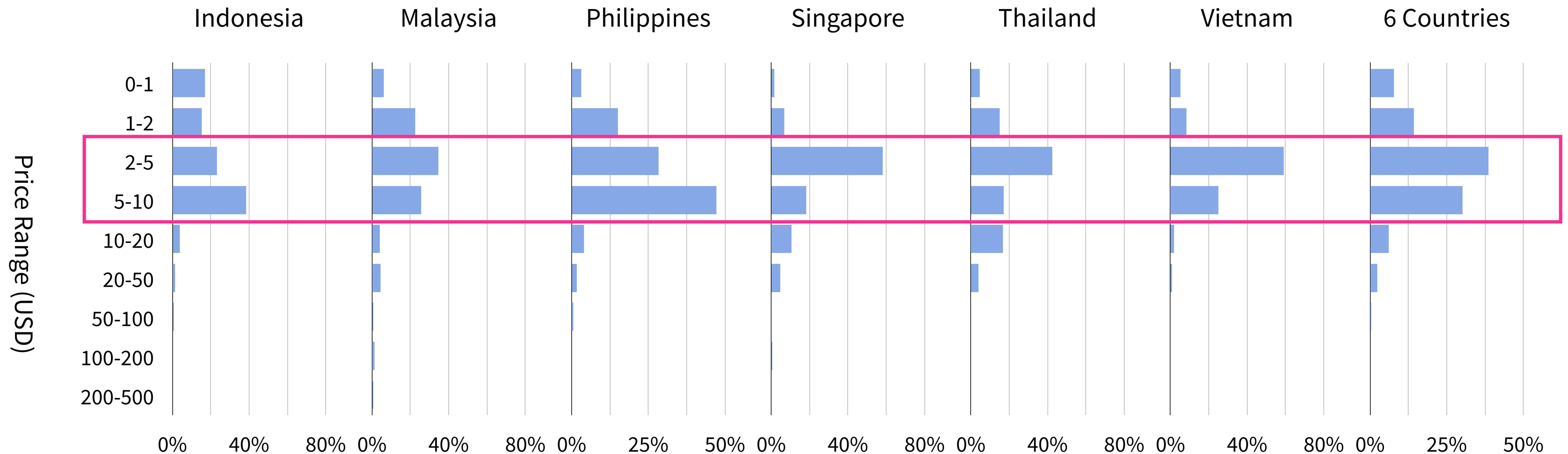
Brand	Selling Country
Siêu thị tự chọn C-Mart	Vietnam
Mr. Squirrel Snack shop	Philippines
RedMart	Singapore
VFOODS Official Shop	Thailand
conley shop	Indonesia

## TMO Observations:

- The **top-selling store**, **Siêu thị tự chọn C-Mart**, is a multi-brand Chinese snack retailer in Vietnam.
- Other top stores include the **VFOODS Shopee Mall Official Store**, with over 100,000 followers and a 4.8/5 rating. Shopee Mall provides official sales channels for verified local and international brands.

# Biscuits & Crackers - Price Range

## Share of Revenue by Price Range and Country



Across all six countries, products priced **between \$2–\$10** are the best-selling.

- The **\$2–5** price range accounts for **38%** of sales.
- In **Malaysia, Thailand, Singapore, and Vietnam**, **\$2–5** products dominate Shopee and Lazada sales.
- In **Thailand**, higher-priced products (**\$10–20**) also perform well. In **Indonesia and the Philippines**, the **\$5–10** range sees more sales.

# Biscuits & Cracker - Trending New Products



**Brand:** Franzzi

**Store:** Siêu thị tự chọn C-Mart

**Price:** \$3.18

**Category:** Food & Beverage > Snacks > Cookies & Wafers

**Country of Origin:** China

**Selling Country:** Vietnam

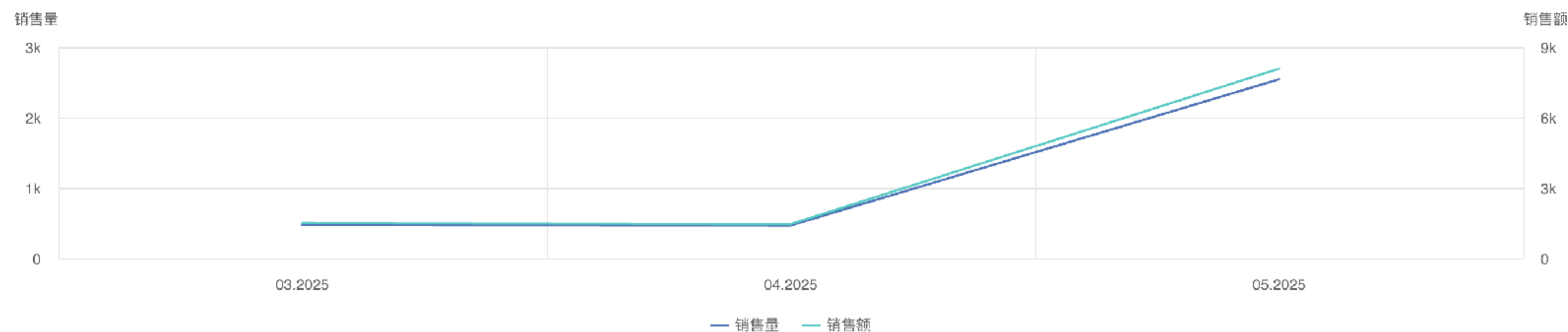
**Ingredients:** Chocolate, strawberry flavor, matcha flavor, emulsifier, food coloring, flavor enhancer, sugar, wheat flour, etc.

**Usage:** Snacking, Dessert, Pairing with tea/coffee, Sharing with friends & family


## [C-MART] FRANZZI CHOCOLATE COVERED LAVA COOKIE BALLS 3 FLAVORS BOX 100G

Franzzi (Chinese brand) is a snack food brand under Dongguan Sunssi Food Group, established in 2009. Specializing in premium sandwich cookies, egg rolls, soft cookies, malt candy, and nougat, the brand targets fashion-forward young consumers who pursue quality desserts.

### SALES TREND MONITORING - TMO Market Insider



### PRICE TRACKING - TMO Market Insider

产品	Old Price	New Price	Modification Time
 [C-MART] Franzzi Chocolate Covered Lava Cookie B...	原价 \$1.56	原价 \$1.56	2025-02-17
	价格 \$1.31	价格 \$1.31 <span style="color: red;">▼ \$0.02</span>	
 [C-MART] Franzzi Chocolate Covered Lava Cookie B...	原价 \$1.56	原价 \$1.56	2025-03-19
	价格 \$1.31	价格 \$3.16 <span style="color: green;">▲ \$1.85</span>	

# Biscuits & Cracker - Trending New Products

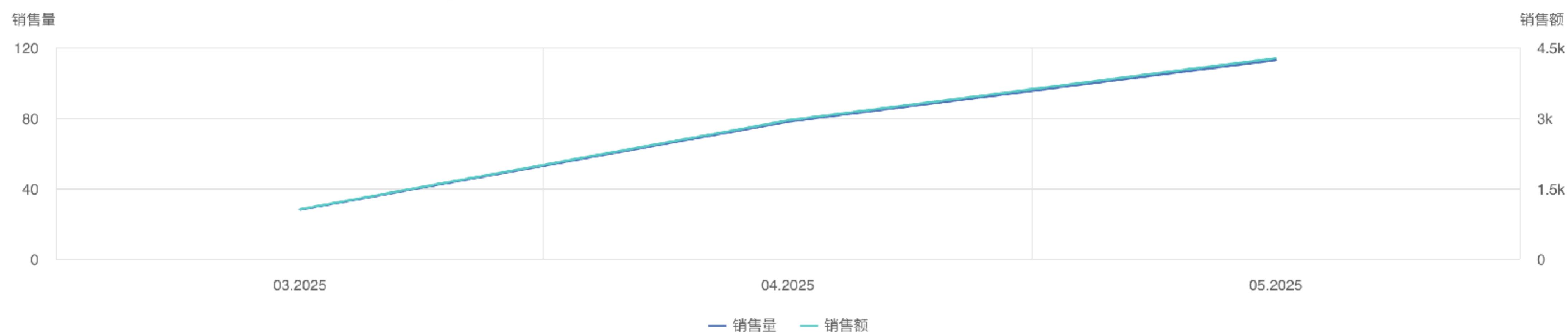


**Brand:** Munchy's  
**Store:** JT MART  
**Price:** \$37.87  
**Category:** Food & Beverage > Snacks > Cookies & Wafers  
**Country of Origin:** Malaysia  
**Selling Country:** Malaysia  
**Ingredients:** Cocoa powder, wheat flour, sugar, vegetable fat, milk powder, emulsifier (soy lecithin), artificial flavors, etc.  
**Usage:** Snacking, Party favors, Desserts

## MUNCHY'S MUZIC WAFER ROLLS CARTON - CHOCOLATE (85G X 36)

Munchy's is a Malaysian biscuit brand founded in 1991 by the Tan brothers (Soo Kuok Tan, Lee Kok Tan, et al.) in the small town of Batu Pahat, Johor. Starting with just a single second-hand wafer bar machine, the brothers gradually built it into a thriving business that became a household name in Malaysia's snack industry.

### SALES TREND MONITORING - TMO Market Insider



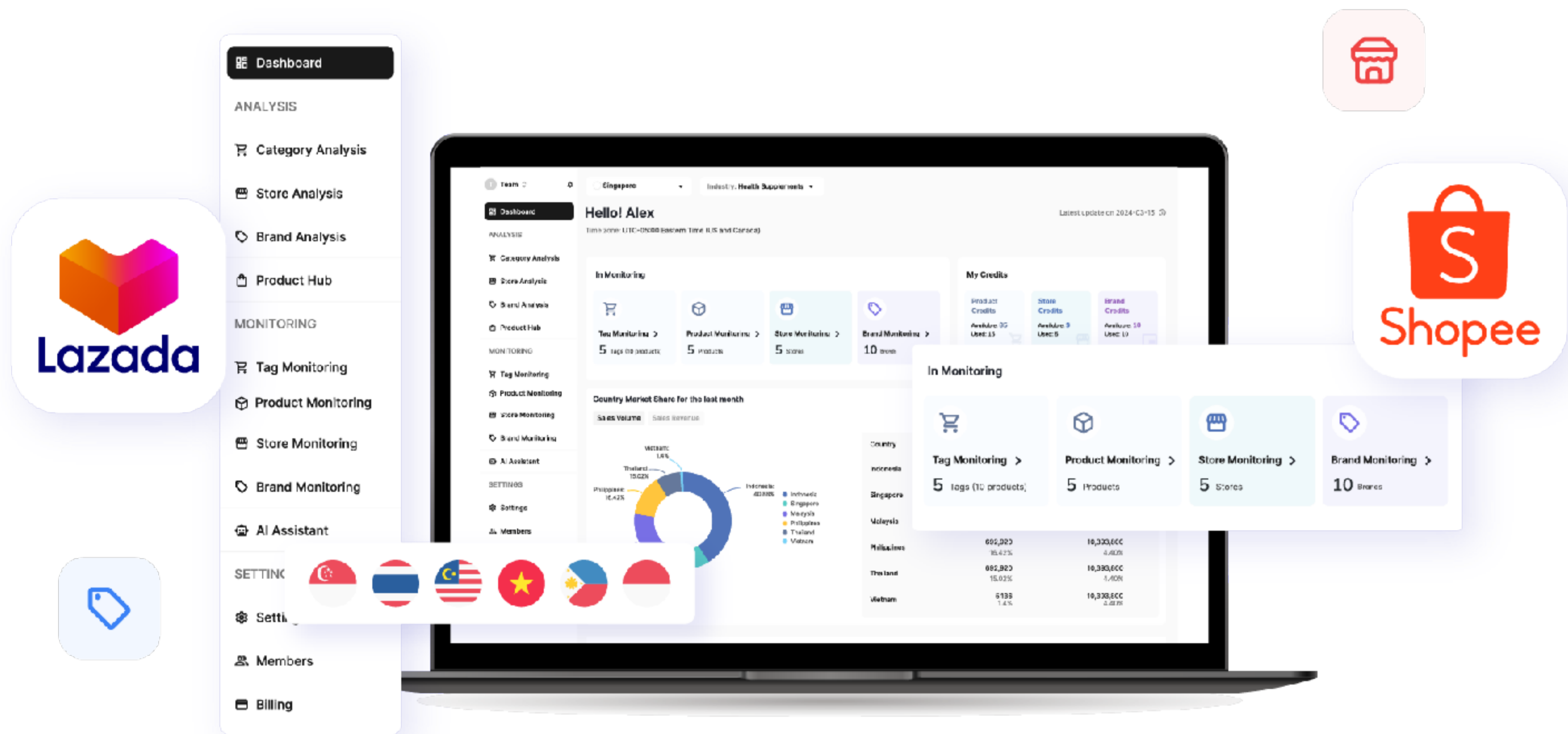
### TITLE TRACKING - TMO Market Insider

产品	Original Title / New Title	Modification Time
	Original Title	
	New Title	2025-01-01
	Original Title	
	New Title	2025-02-17

# Closing Notes

- The South East Asian snacks market holds great potential and there is still much to be explored. Although this outlook have covered several snacks categories, more insights can be gathered from the data, such as delving into more specific subcategories, analyzing price distribution and average review scores among brands, as well as tracking sales and brand performance in the long term.
- If you're interested in obtaining deeper insights into the F&B market or any other market in South East Asia, please feel free to reach out to [TMO Group](#). We can collaborate with you to help you achieve your goals.

# TMO eCommerce data platform - Market Insider is now available for demo!



- Covering six Southeast Asian countries and major eCommerce platforms, it spans 7 major industries including **health, beauty, food and beverage, home appliances, sports and outdoor**, with hundreds of subcategories and features TMO's specialized standardized classification for health supplements, real-time trend tracking, and in-depth competitor monitoring.



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# About TMO



TMO Group is a Digital Commerce Agency, Based in Shanghai, Chengdu, Hong Kong, Singapore and Amsterdam. We provide brands with Consultancy, Design, Development & Managed services covering (e)Commerce - Data - AI.

TMO offers integrated solutions for the entire eCommerce value chain with a strong focus on Health & Beauty for Business-to-Consumer (B2C) / Direct-to-consumer (D2C) & Industry wide focus for Business-to-Business (B2B).

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