

Thought Leadership | EMCG | Snacking | September 2026

Winning in Snacking:

what India's 129 volume winners do differently

NielsenIQ



Snacking is no longer defined by hunger. It is driven by moments. NIQ data on five strategic imperatives, and one proven growth bet, shows how the few brands that win at scale create, serve and stay visible in them.

Snacking is no longer defined by hunger. It is increasingly driven by moments.

A commuter grabs a quick bite between meetings. A teenager discovers a new flavour on social media. A family marks a regional festival. A late-night order arrives through quick commerce. Each is an opening for a brand to grow.

Yet despite the abundance of opportunity, very few brands succeed at scale. NIQ tracks around 65,000 FMCG brands across 88 categories in India. Only 129 qualify as true volume winners.

0.2%
of ~65,000 tracked FMCG brands are true volume winners

86%
of online purchases were top-ups, not full baskets (Q1 2025)

2.2x
e-commerce growth on non-Diwali festivals, while offline stays flat

Of those 129, 31 are established brands with more than 10% value share and 90 are evolving brands with 1.1% to 9.9%. Just 8 come from the 63,680 emerging brands below 1%. Read that carefully. Scale helps, but it does not decide the outcome, and a smaller brand cannot simply outspend its way in.

What the 129 share is a set of choices. Across NIQ's snacking data, those choices fall into three moves, which we call the WIN formula.

W

Win new occasions
Create the moments in which your brand is chosen

I

Innovate around need gaps
Offer what the shopper wants and the shelf does not

N

Navigate to scale
Stay visible and reachable, from social feeds to the store shelf

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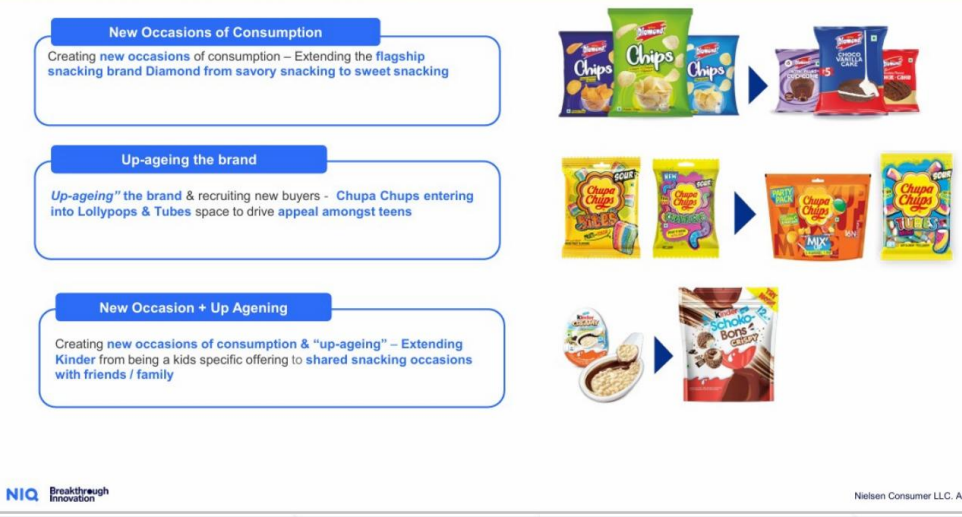
W | Win new occasions

Winners do not wait for the market to grow. They create the moments in which their brand is chosen.

Create occasions, not just products

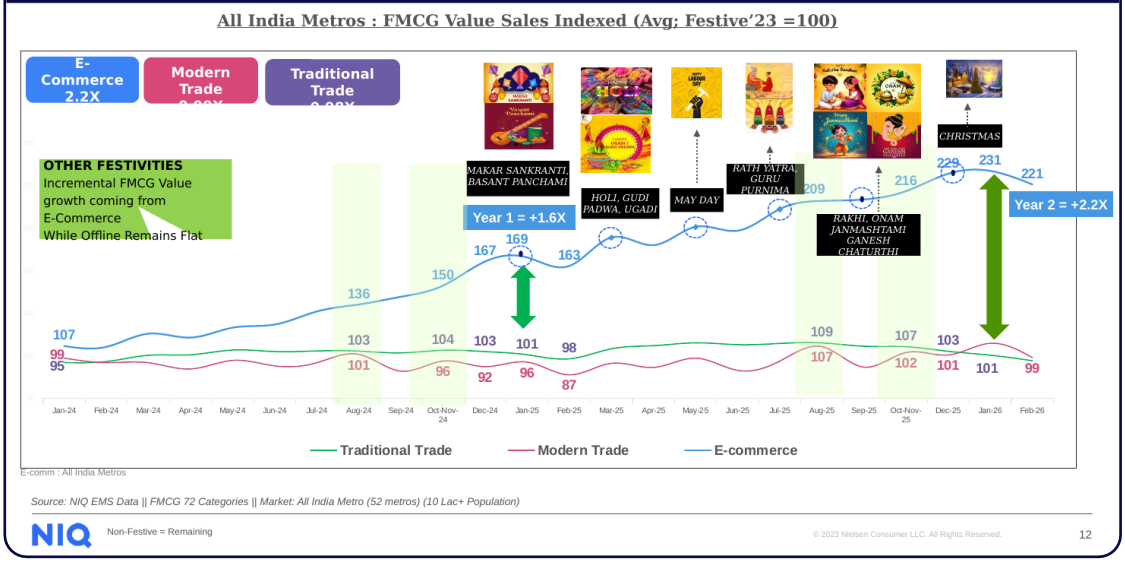
Diamond moved from savoury chips into sweet snacking. Chupa Chups entered lollipops and tubes to recruit teens. Kinder moved from a kids' product to a shared occasion for friends and family through Schoko-Bons.

Winners Create New Occasions and Dominate those occasions



The calendar is an occasion map too. Across the 52 metros NIQ tracks, incremental FMCG value growth on festivals beyond Diwali, from Makar Sankranti and Holi to Onam, Ganesh Chaturthi and Christmas, came from e-commerce at 2.2X. Modern Trade (0.99X) and Traditional Trade (0.98X) stayed flat. Regional moments are growth windows, and online is where they are being captured.

Winners look beyond the normal Big Day occasions and look for other festivities to drive sales



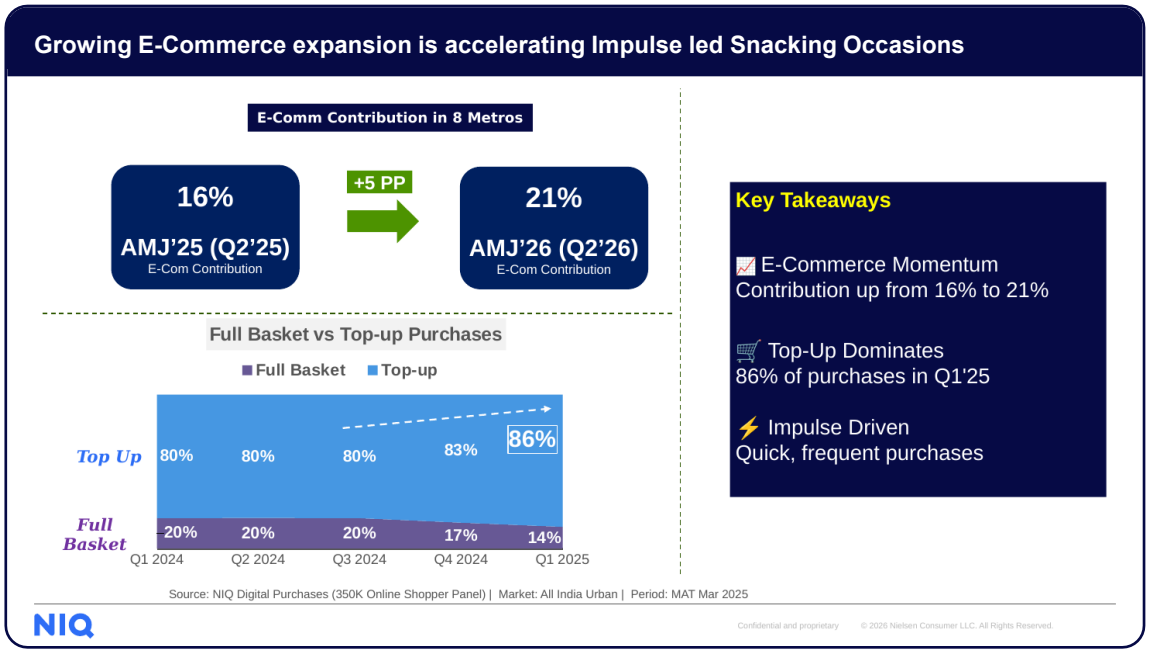
Non-Diwali festivities: incremental growth is coming from e-commerce.
Source: NIQ EMS, FMCG 72 categories, All India Metros

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Quick commerce is turning impulse into the default

The fastest-growing occasion engine is on the phone. E-commerce contribution across the 8 metros rose from 16% to 21% between Q2 2025 and Q2 2026. Online, the shopping mission has become the top-up: 86% of purchases in Q1 2025 were top-ups, up from around 80% in early 2024. Quick, frequent and impulse-led is the profile of a snack purchase.

Full baskets are the minority, but where they happen they average about 14 items and ₹1,400, a sign that families are starting to trust online for weekly essentials, not just emergencies. Digital platforms are moving from emergency mode to everyday mode.



E-commerce momentum and the rise of top-up purchases.
Source: NIQ Digital Purchases (350K Online Shopper Panel), All India Urban

The shopper is changing as well. Gen Z, led by 18 to 24 year olds, is defining a new convenience culture. Quick commerce is moving beyond grocery, with Gen Z orders rising across Home & Kitchen and Appliances. The 10 PM to 2 AM window is gaining importance, driven by impulse purchases. Late night is becoming an occasion of its own.

For snack brands, the implication is direct. On a quick-commerce screen the shopper decides in seconds from a small digital shelf. Visibility, an add-on price point and a pack built for one person at midnight are now part of the product.

I | Innovate around need gaps

Winners find what the shopper wants and the shelf does not yet offer.

Sell the benefit, not the product

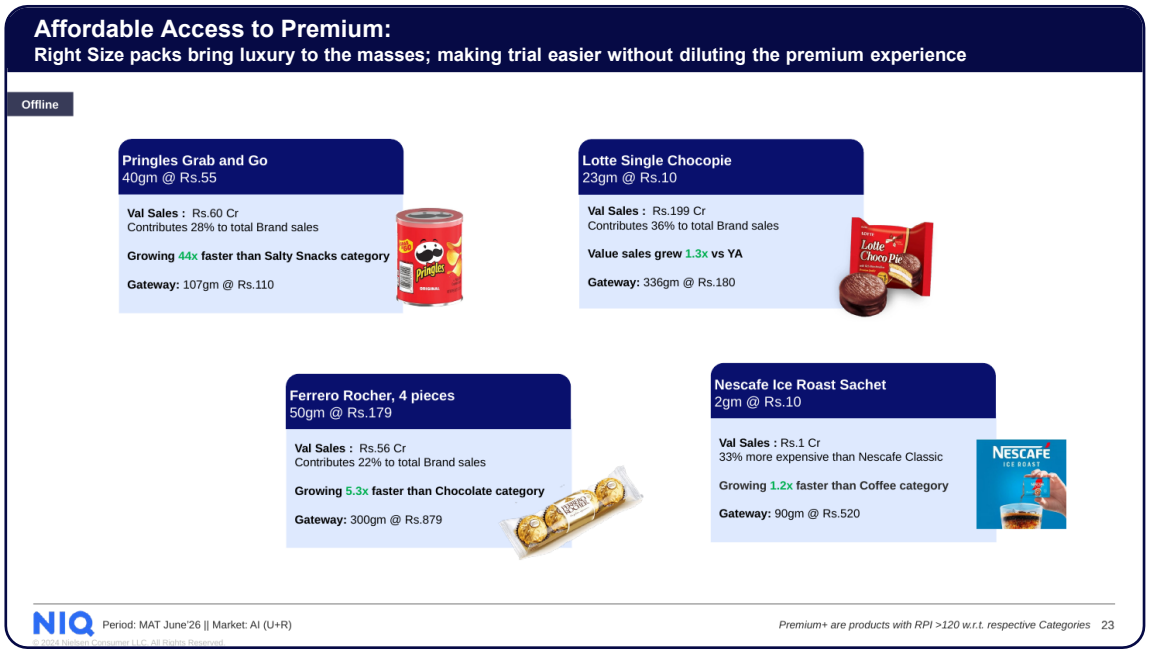
63% of Indian consumers say they look for healthy and innovative snacking, and 43% say they eat optimal portions (NIQ India Healthy Snacking Food Trends, 2024). Breakthrough brands answer both without trading away taste: millets, nuts and dates, clean labels, and pack sizes built for portion control.

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Close the gaps others leave open

Three gaps stand out in NIQ's MAT June 2026 offline data.

- **Better for you, without the compromise.** Maggi Nutrilicious Atta Noodles (₹263 Cr) is growing 2.8x faster than instant noodles. Bingo Popped Chips (₹8 Cr) is growing 41x faster than salty snacks. Yogabar Oats (₹18 Cr) grew 5.1x on the year.
- **Premium, at an accessible price.** Pringles Grab and Go (40g at ₹55) contributes 28% of brand sales, and Lotte's single Chocopie (23g at ₹10) contributes 36%. Ferrero Rocher in a 4-piece pack contributes 22% and is growing 5.3x faster than chocolate. A small pack removes the risk of trying the premium.
- **Global flavour, local reach.** Davidoff is growing 2.6x faster than coffee, Nissin Geki's Korean noodles have reached ₹101 Cr, and Malkist's cheese, chocolate and cappuccino crackers have reached ₹353 Cr.



Right-size packs: premium without the price barrier. Source: NIQ, MAT June 2026, All India (U+R)

N | Navigate to scale

A good idea stalls without visibility and reach. Winners work on both.

Borrow attention from culture

Oreo partnered with Stranger Things on a limited-edition Red Velvet. Knorr launched its Korean ramen range around Squid Game 2. Coca-Cola and IRCTC named a train the Sprite Tejas Express. In each case the brand meets people inside something they already care about.

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Buy or partner for the niche

Large manufacturers acquire the specialists they cannot build quickly, as Marico did with True Elements. Partnerships work too: KurKure's Schezwan Twist borrows Ching's Secret flavour for fusion snacking. For smaller brands, being the niche that scales is a route to the top.

Keep expanding distribution

The least glamorous lever is the most consistent. Winners keep adding outlets, particularly in rural and regional markets, and the growth follows.

- **Tanwani** (Uttar Pradesh, rural): 240K dealers, up 59K, growing about 8X faster than its segment on ₹5 packs.
- **1 to 3 Noodles** (Karnataka, rural): 110K dealers, up 25K, growing almost 12X faster than instant noodles.
- **Sobisco Cookies** (West Bengal, rural): 213K dealers, up 39K, growing 21X faster than cookies.
- **Lotte Chocopie** (Tamil Nadu, urban): 67K dealers, up 3K, growing 22X faster than the cream segment.

What should snacking leaders do now?

Win | name the occasion you want to own.
Choose one new moment or regional festival, and give it a budget and an owner. Treat the quick-commerce top-up, including late night, as an occasion to design for.

Innovate | make the first purchase easy.
Build entry packs that make a premium range simple to try, and back every better-for-you claim with taste. Health earns the trial. Taste earns the repeat.

Navigate | follow growth to where it is.
Map where your distribution is thin in the fastest-growing markets, and stay visible at every point of discovery before competitors do.

The road ahead

The future of snacking will not be won by the brands with the largest portfolios. It will be won by brands that spot emerging occasions faster, innovate around unmet needs, and stay visible across every point of consumer discovery, from social feeds to store shelves to quick-commerce platforms.

To see the category-level data behind these examples, reach out to your NIQ contact.

Sources: NIQ Volume Winner TL, MAT Mar 2026; NIQ Digital Purchases (350K Online Shopper Panel), All India Urban; NIQ EMS, FMCG 72 categories, All India Metros (52 metros, 10 lakh+ population); NIQ India Healthy Snacking Food Trends, 2024; NIQ retail measurement, MAT June 2026, All India (Urban + Rural).

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