

Fresh Food in the US

December 2023

Table of Contents

Fresh Food in the US

EXECUTIVE SUMMARY

Fresh food in 2023: The big picture

2023 key trends

Retailing developments

What next for fresh food?

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2018-2023

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2018-2023

Table 3 - Retail Sales of Fresh Food by Category: Volume 2018-2023

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2018-2023

Table 5 - Retail Sales of Fresh Food by Category: Value 2018-2023

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2018-2023

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2018-2023

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2018-2023

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2023-2028

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2023-2028

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2023-2028

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2023-2028

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2023-2028

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail volume recovery as eggs emerge from 2022's avian flu outbreak

Shifts in foodservice and institutional demand amid tense socioeconomic climate

PROSPECTS AND OPPORTUNITIES

Rising consumer distrust to impact price mix strategies

Consumer ethics to strengthen call for legislative pressures

Summary 2 - Major Processors of Eggs 2023

CATEGORY DATA

Table 15 - Total Sales of Eggs: Total Volume 2018-2023

Table 16 - Total Sales of Eggs: % Total Volume Growth 2018-2023

Table 17 - Retail Sales of Eggs: Volume 2018-2023

Table 18 - Retail Sales of Eggs: % Volume Growth 2018-2023

Table 19 - Retail Sales of Eggs: Value 2018-2023

Table 20 - Retail Sales of Eggs: % Value Growth 2018-2023

Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2018-2023

Table 22 - Forecast Total Sales of Eggs: Total Volume 2023-2028

Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2023-2028

Table 24 - Forecast Retail Sales of Eggs: Volume 2023-2028

Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2023-2028

Table 26 - Forecast Retail Sales of Eggs: Value 2023-2028

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2023-2028

Fish and Seafood in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Institutional volumes show resilience as retail growth continues to struggle

Climate concerns continue to raise flags in unstable fish and seafood market

PROSPECTS AND OPPORTUNITIES

Transparency and accountability to fuel PR revamp for fish and seafood

Consumer demand to remain hesitant despite deflationary trends

Summary 3 - Major Processors of Fish and Seafood 2023

CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2018-2023

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2018-2023

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2018-2023

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2018-2023

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2018-2023

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2018-2023

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2018-2023

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2023-2028

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2023-2028

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2023-2028

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2023-2028

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2023-2028

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2023-2028

Fruits in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Further retail volume declines amid ongoing supply chain disruptions

Growth of private label as consumers shift preferences

PROSPECTS AND OPPORTUNITIES

Rising confluence of social ethics and commercial practices to fuel claims

Regenerative agriculture as a long-term investment for category growth

Summary 4 - Major Processors of Fruits 2023

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2018-2023

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2018-2023

Table 43 - Retail Sales of Fruits by Category: Volume 2018-2023

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2018-2023

Table 45 - Retail Sales of Fruits by Category: Value 2018-2023

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2018-2023

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2018-2023

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2023-2028

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2023-2028

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2023-2028

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2023-2028

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2023-2028

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2023-2028

Meat in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Foodservice leads meat volume growth as convenience trends continue

Meat's growth threatened by ongoing beef in cattle market

PROSPECTS AND OPPORTUNITIES

Suppliers to face ongoing legislative pressures

Convenience to continue winning consumers as price gaps close

Summary 5 - Major Processors of Meat 2023

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2018-2023

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2018-2023

Table 56 - Retail Sales of Meat by Category: Volume 2018-2023

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2018-2023

Table 58 - Retail Sales of Meat by Category: Value 2018-2023

Table 59 - Retail Sales of Meat by Category: % Value Growth 2018-2023

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2018-2023

Table 61 - Forecast Sales of Meat by Category: Total Volume 2023-2028

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2023-2028

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2023-2028

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2023-2028

Table 65 - Forecast Retail Sales of Meat by Category: Value 2023-2028

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2023-2028

Nuts in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation and challenging economic environment lead to unit price hikes

Retail volumes decline as foodservice recovers

PROSPECTS AND OPPORTUNITIES

Convenience trends to fuel competition from processed nuts, impacting peanut growth

El Niño to intensify climate impact on product seasonality

Summary 6 - Major Processors of Nuts 2023

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2018-2023

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2018-2023

Table 69 - Retail Sales of Nuts by Category: Volume 2018-2023

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2018-2023

Table 71 - Retail Sales of Nuts by Category: Value 2018-2023

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2018-2023

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2018-2023

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2023-2028

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2023-2028

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2023-2028

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2023-2028

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2023-2028

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2023-2028

Pulses in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Further retail volume declines amid foodservice recovery

Price volatility and supply disruptions affect growth

PROSPECTS AND OPPORTUNITIES

Growing appeal of plant-based proteins to boost growth of pulses

Pulses grow as a tool for soil health

Summary 7 - Major Processors of Pulses 2023

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2018-2023

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2018-2023

Table 82 - Retail Sales of Pulses by Category: Volume 2018-2023

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2018-2023

Table 84 - Retail Sales of Pulses by Category: Value 2018-2023

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2018-2023

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2018-2023

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2023-2028

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2023-2028

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2023-2028

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2023-2028

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2023-2028

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2023-2028

Starchy Roots in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Supply chain disruptions challenge growth in staple ingredients: Potatoes

Shifts in supply chain to increase strain on potato alternatives

PROSPECTS AND OPPORTUNITIES

Global climates to threaten supply chain stability

Moderating foodservice growth to threaten outlook

Summary 8 - Major Processors of Starchy Roots 2023

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2018-2023

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2018-2023

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2018-2023

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2018-2023

Table 97 - Retail Sales of Starchy Roots by Category: Value 2018-2023

Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2018-2023
Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2018-2023
Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2023-2028
Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2023-2028
Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2023-2028
Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2023-2028
Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2023-2028
Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2023-2028

Sugar and Sweeteners in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sugar reduction and health trends influence demand for sugar and sweeteners
Supply chain disruptions result in rising unit prices

PROSPECTS AND OPPORTUNITIES

Volatile weather patterns to further strain supply chain stability
Global tensions to increase strain on domestic supply
Summary 9 - Major Processors of Sugar and Sweeteners 2023

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2018-2023
Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2018-2023
Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2018-2023
Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2018-2023
Table 110 - Retail Sales of Sugar and Sweeteners: Value 2018-2023
Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2018-2023
Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2018-2023
Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2023-2028
Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2023-2028
Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2023-2028
Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2023-2028
Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2023-2028
Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2023-2028

Vegetables in the US

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures continue to slow retail growth
Threats to crop yields feed push for regenerative agriculture

PROSPECTS AND OPPORTUNITIES

2024 elections to sway legislative insecurity on rising production costs
Uneven sustainability reform across supply chain to have further impact on growth
Summary 10 - Major Processors of Vegetables 2023

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2018-2023
Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2018-2023
Table 121 - Retail Sales of Vegetables by Category: Volume 2018-2023

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2018-2023

Table 123 - Retail Sales of Vegetables by Category: Value 2018-2023

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2018-2023

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2018-2023

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2023-2028

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2023-2028

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2023-2028

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2023-2028

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2023-2028

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/fresh-food-in-the-us/report.