Euromonitor International

Meals and Soups in the US

November 2025

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Meals and Soups in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordable and convenient products appeal

INDUSTRY PERFORMANCE

Home cooking resurgence supports mild value growth in meals and soups
Chilled pizza was the most dynamic category in 2025

WHAT NEXT?

Price pressures to drive new launches and innovations
Players will continue to adapt to GLP-1 lifestyles with products that complement the use of such medications
US tariffs could elevate consumer prices and hinder innovation

COMPETITIVE LANDSCAPE

Private label extends its lead in meals and soups
The JM Smucker Co inaugurated its third manufacturing facility and improved its portfolio

CHANNELS

Supermarkets and hypermarkets account for bulk of sales
Price-sensitive consumers are enticed by warehouse channels

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Cooking Ingredients and Meals in the US - Industry Overview

EXECUTIVE SUMMARY

Shift to home cooking benefits sales, as consumers seek to save money

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Home cooking trends bolster demand, but economic factors and US tariffs present challenges
Sauces, dips and condiments grows as consumers seek to enhance flavour, add variety, and recreate restaurant-style dishes at home
Major players respond to use of GLP medications

WHAT'S NEXT?

Economic pressures will place stronger emphasis on home cooking
GLP-1 use will guide further product development

New legal definition of ‘healthy’ will lead to reformulation of products

COMPETITIVE LANDSCAPE

Private label share accounts for majority of sales
Stability is anticipated for the competitive landscape

CHANNELS

Supermarkets lead as some shoppers switch to discounters and warehouse clubs
Retail e-commerce enjoys strong growth

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DISCLAIMER

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