Euromonitor International

Processed Meat, Seafood and Alternatives to Meat in the United States

November 2026

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

INDUSTRY PERFORMANCE

Price growth fuels value-driven spending but opportunities at the higher-end remain
Processed meat remains dominant due to versatility and ingrained habits
Tofu and derivatives outperforms as consumers seek versatile protein
Chart 1 Value Sales 2021-2031
Chart 2 Volume Sales 2021-2031
Chart 3 Value Sales by Category 2026

WHAT'S NEXT?

Processed meat set to lead retail value as price growth offsets stagnant volumes
Tofu and derivatives to outpace growth as consumers embrace versatile natural proteins
Brands set to pivot from imitation to versatile protein as consumers demand authenticity
Chart 1 Forecast Value Sales 2021-2031
Chart 2 Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Tyson Foods maintains its lead, while private label captures a significant consolidated share
Premium Brands and Mark Foods acquisitions expand production and distribution capabilities
Chart 1 Company Shares 2026
Chart 2 Brand Shares 2026

CHANNELS

Retail e-commerce overtakes all offline channels to become the leading retail channel
Digital grocery platforms and last-mile delivery reshape access and competition
Chart 1 Retail Channels 2021-2026

PRODUCTS

Affordability and the plant-based pivot steer innovation toward versatile proteins
Mori-Nu and High Liner Foods deliver innovative formats capturing diverse consumer needs
Innovation balancing convenience and freshness reshapes competitive dynamics

ECONOMIC CONTEXT

Chart 1 Real GDP Growth 2021-2031
Chart 2 Inflation 2021-2031

CONSUMER CONTEXT

Chart 1 Population 2021-2031
Chart 2 Population by Generation 2026
Chart 3 Consumer Expenditure 2021-2031

COUNTRY REPORTS DISCLAIMER

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-the-united-states/report.