



# Staple Foods in the US

November 2025

Table of Contents

## Staple Foods in the US

### EXECUTIVE SUMMARY

Health and wellness concerns shape demand but price-sensitivity intensifies

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Financial pressures and health concerns continue to impact market demand in 2025

Unit price growth stabilises as players adjust to global challenges

Volume sales return to growth in a challenging market

#### WHAT'S NEXT?

Challenging future ahead with volume sales predicted to decline

Regulatory changes and trade tensions expected to influence the market

Investment expected in infrastructure and distribution developments

#### COMPETITIVE LANDSCAPE

Artisanal players and private label lead sales

Ferrero acquires WK Kellogg in USD3.1 billion deal

#### CHANNELS

Supermarkets and hypermarkets still dominate but face growing competition

E-commerce remains the most dynamic distribution channel

#### MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Baked Goods in the US

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Cost concerns boost sales of more affordable products and small pack sizes

#### INDUSTRY PERFORMANCE

Economic pressures weigh on volume sales of baked goods in 2025

Consumers turn to smaller pack sizes for health and financial reasons

## WHAT'S NEXT?

Mixed outlook projected for baked goods with health, cost and indulgence influencing demand

The growing role of protein in the baked goods landscape

Potential impacts of the FDA's proposed revocation of baking standards

## COMPETITIVE LANDSCAPE

Players focusing on extending the shelf life of bread

Offering a longer shelf life could allow players to compete more effectively with artisanal products

## CHANNELS

Supermarkets benefit from delivering a good mix of packaged and unpackaged baked goods

E-commerce full of potential with further investments expected

## CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 17 - Sales of Pastries by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

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### [Breakfast Cereals in the US](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Price-sensitivity and health concerns impact sales

## INDUSTRY PERFORMANCE

Economic and health pressures are impacting breakfast choices

Muesli and granola thriving thanks to its healthy and versatile image

## WHAT'S NEXT?

Cautious spending behaviour set to limit growth while boosting private label sales

Innovation targeting health and wellbeing

Breakfast cereals market faces reform as FDA bans synthetic dyes and redefines what is 'healthy'

## COMPETITIVE LANDSCAPE

General Mills cements its lead through innovative new product development and marketing

Ferrero acquires WK Kellogg Co as it expands into breakfast cereals

## CHANNELS

Consumers shifting to more affordable channels as supermarkets lose share

E-commerce thriving thanks to improving infrastructure

## CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

- Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025
- Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025
- Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025
- Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025
- Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025
- Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025
- Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030
- Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030
- Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030
- Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

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### Processed Fruit and Vegetables in the US

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Long shelf life appeals to consumers seeking convenience

##### INDUSTRY PERFORMANCE

Processed fruit and vegetables sees a partial recovery in demand as prices stabilise

Frozen fruit benefits from being a healthy and convenient category

##### WHAT'S NEXT?

Tense economic outlook set to test market resilience

Marketing strategies to increase as part of efforts to engage consumers

Tightening regulations creating opportunities for healthier products

##### COMPETITIVE LANDSCAPE

Tight budgets and negative consumer perceptions impact the leading brands

Private label increases its control over the market

##### CHANNELS

Slight shift in the distribution landscape as consumers look for better deals

Consumers going online in search of convenience and value

##### CATEGORY DATA

- Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025
- Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025
- Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025
- Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025
- Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025
- Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025
- Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025
- Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025
- Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030
- Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030
- Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030
- Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### Processed Meat, Seafood and Alternatives To Meat in the US

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Growth hindered by high prices and health concerns

### INDUSTRY PERFORMANCE

Poultry is gaining ground to the detriment of red meat

Health and wellness trend fuelling demand for chilled processed seafood

### WHAT'S NEXT?

Evolving lifestyle habits set to have a mixed impact on the market

Legislation likely to impact production costs and consumer prices

Tariffs could raise seafood prices and change consumer purchasing behaviour

### COMPETITIVE LANDSCAPE

Private label continues to lead sales

Steak-umm's investments in innovative marketing strategies pays off

### CHANNELS

Supermarkets and hypermarkets lose ground to budget-friendly alternatives

E-commerce continues to make inroads as an increasingly important channel

### CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

### COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in the US](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Instant noodles benefits from innovation and expanding consumer base

### INDUSTRY PERFORMANCE

Value sales driven by customizability and convenience

Expanding Asian population fuelling growth in instant noodles

### WHAT'S NEXT?

Sales set to grow but challenges remain

Health and wellness concerns and novelty flavours likely to influence demand

Regulatory and trade tensions could shake up the market

## COMPETITIVE LANDSCAPE

Nongshim climbs the rankings with its increasingly popular range of instant noodles

Private label bucks the trend and sees its strongest growth in rice and pasta

## CHANNELS

Distribution patterns vary according to category

E-commerce the most dynamic channel overall

## CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

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