



Competitor Strategies in Cooking Ingredients and Meals

January 2026

INTRODUCTION

Executive summary

COMPETITIVE LANDSCAPE

Companies at a glance

“Cooking ingredients and meals” exists within the wider food and beverage industry

It is an industry that is relatively fragmented, particularly in developing regions

Market share losses common among the largest players

A developed market focus is holding the largest players back

Stability in projected shares masks the wave of turbulence to come

The rise of private label is part of the wider affordability challenge

THE SHRINKING BIG PLAYERS

The biggest players are looking to split, shrink, or shift their focus

Why are the largest food companies struggling right now?

The challenges of Kraft Heinz have been symbolic of the industry as a whole

Unilever continues to sell off some of its largest food brands

Future industry leader Nestlé is tightening its focus onto its largest brands

Privately-held Ferrero is pursuing different goals than its public rivals

HELLOFRESH AND THE FUTURE OF MEAL KITS

HelloFresh has seized control of the troubled meal kits category

Can anyone challenge HelloFresh?

CONCLUSIONS

Key findings

Questions we are asking

APPENDIX

Projected company sales: FAQs

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