



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

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Supermarkets lead as some shoppers switch to discounters and warehouse clubs

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