



Euromonitor
International

Staple Foods in the US

November 2025

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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

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Baked Goods in the US

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

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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

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[Breakfast Cereals in the US](#)

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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

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[Processed Fruit and Vegetables in the US](#)

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

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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

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[Processed Meat, Seafood and Alternatives To Meat in the US](#)

KEY DATA FINDINGS

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Growth hindered by high prices and health concerns

INDUSTRY PERFORMANCE

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Health and wellness trend fuelling demand for chilled processed seafood

WHAT'S NEXT?

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Legislation likely to impact production costs and consumer prices

Tariffs could raise seafood prices and change consumer purchasing behaviour

COMPETITIVE LANDSCAPE

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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

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