



**Euromonitor
International**

Processed Meat, Seafood and Alternatives To Meat in the US

November 2025

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

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 4 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 5 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 6 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 7 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 8 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 9 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 10 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 11 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 12 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 13 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 14 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

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Staple Foods in the US - Industry Overview

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 15 - Sales of Staple Foods by Category: Volume 2020-2025
Table 16 - Sales of Staple Foods by Category: Value 2020-2025
Table 17 - Sales of Staple Foods by Category: % Volume Growth 2020-2025
Table 18 - Sales of Staple Foods by Category: % Value Growth 2020-2025
Table 19 - NBO Company Shares of Staple Foods: % Value 2021-2025
Table 20 - LBN Brand Shares of Staple Foods: % Value 2022-2025
Table 21 - Penetration of Private Label by Category: % Value 2020-2025
Table 22 - Distribution of Staple Foods by Format: % Value 2020-2025
Table 23 - Forecast Sales of Staple Foods by Category: Volume 2025-2030
Table 24 - Forecast Sales of Staple Foods by Category: Value 2025-2030
Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030
Table 26 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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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-us/report.