



**Euromonitor
International**

Meals and Soups in the US

November 2025

Table of Contents

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

CATEGORY DATA

- Table 1 - Sales of Meals and Soups by Category: Volume 2020-2025
- Table 2 - Sales of Meals and Soups by Category: Value 2020-2025
- Table 3 - Sales of Meals and Soups by Category: % Volume Growth 2020-2025
- Table 4 - Sales of Meals and Soups by Category: % Value Growth 2020-2025
- Table 5 - Sales of Chilled Ready Meals by Ethnicity: % Value 2020-2025
- Table 6 - Sales of Frozen Ready Meals by Ethnicity: % Value 2020-2025
- Table 7 - Sales of Soup by Leading Flavours: Rankings 2020-2025
- Table 8 - NBO Company Shares of Meals and Soups: % Value 2021-2025
- Table 9 - LBN Brand Shares of Meals and Soups: % Value 2022-2025
- Table 10 - Distribution of Meals and Soups by Format: % Value 2020-2025
- Table 11 - Forecast Sales of Meals and Soups by Category: Volume 2025-2030
- Table 12 - Forecast Sales of Meals and Soups by Category: Value 2025-2030
- Table 13 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2025-2030
- Table 14 - Forecast Sales of Meals and Soups by Category: % Value Growth 2025-2030

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

CHANNELS

Supermarkets lead as some shoppers switch to discounters and warehouse clubs

Retail e-commerce enjoys strong growth

MARKET DATA

Table 15 - Sales of Cooking Ingredients and Meals by Category: Volume 2020-2025

Table 16 - Sales of Cooking Ingredients and Meals by Category: Value 2020-2025

Table 17 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2020-2025

Table 18 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2020-2025

Table 19 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2021-2025

Table 20 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2022-2025

Table 21 - Penetration of Private Label by Category: % Value 2020-2025

Table 22 - Distribution of Cooking Ingredients and Meals by Format: % Value 2020-2025

Table 23 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2025-2030

Table 24 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2025-2030

Table 25 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2025-2030

Table 26 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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