



Euromonitor
International

Cooking Ingredients and Meals in the US

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Cooking Ingredients and Meals in the US

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

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Olive oil sees higher prices but benefits from consumers seeking healthy options

INDUSTRY PERFORMANCE

Consumers shift toward natural and minimally processed edible oils

Evolving pricing strategies shape category performance

WHAT NEXT?

Polarisation between premium and value segments
Health perceptions and more transparent labelling will guide purchasing decisions
Sustainability messaging and supply chain transparency become imperatives

COMPETITIVE LANDSCAPE

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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
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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Consumption rises as shoppers switch to more affordable lines

Small and emerging brands take on heavyweights

Flavour development entices millennials and Gen Z

WHAT NEXT?

Innovation will capitalise on home cooking trend amid economic pressures

FDA redefines “healthy”, prompting reformulation in sauces, dips and condiments

US tariffs could lead to higher prices and less innovation

COMPETITIVE LANDSCAPE

Private label performs well in challenging economic climate

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2025 DEVELOPMENTS

More erratic daily routines impact breakfast demand

INDUSTRY PERFORMANCE

Value growth is stifled by weak price growth over 2025

Honey remains the sweet spot aided by rising consumption

WHAT NEXT?

Consumer lifestyles and industry perceptions will disproportionately affect growth

Greater ingredient scrutiny to benefit independent brands and minimally processed goods

Global volatility poses threat to supply chain stability

COMPETITIVE LANDSCAPE

The JM Smucker Co asserts leading position in sweet spreads

Premiumisation and wellness trends support demand for specialist brands

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