

Soup - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Sales in the total soup category have been flat and are expected to remain flat through 2020. Sales of refrigerated and frozen soups, as well as broths and stocks, are anticipated to grow on account of their less-processed nature and consumers' interest in cooking. Canned and dry soup brands, which are expected to continue declining, could get a boost with more gourmet and organic introductions, as well as more customizable offerings.

This report looks at the following areas:

- Growing interest in cooking helping broth sales
- Refrigerated, frozen soups up on strong interest in fresh, natural products
- RTE wet, condensed and dry soups flat due to not-so-healthy image

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Soup - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Growing interest in cooking helping broth sales

Figure 1: Total US sales and fan chart forecast of wet broth/stock, at current prices, 2010-20

Refrigerated, frozen soups up on strong interest in fresh, natural products

Figure 2: Total US sales and fan chart forecast of refrigerated fresh soup/frozen soup, at current prices, 2010-20

RTE wet, condensed and dry soups flat due to not-so-healthy image

Figure 3: Total US retail sales and forecast of soup, by segment, at current prices, 2010-20

The opportunities

Demand still lies in the traditional

Figure 4: Ideal Soup, August 2015

Rejuvenating, snack-able soups appeal to Millennials

Figure 5: Ideal Soup Attributes, by demographics, August 2015

Figure 6: Ideal Soup Eating Occasions, by demographics, August 2015

Convenient packaging in demand, but not the same from generation to generation

Figure 7: Desirable Packaging Types, by demographics, August 2015

Figure 8: Desirable Packaging Types, by demographics, August 2015

What it means

The Market – What you need to know

Refrigerated fresh, frozen soups enjoy impressive growth

Healthy growth for wet broth, soup stock

Sales of canned wet, dry soups flat due to processed perception

Market Size and Forecast

Soup category to remain flat through 2020

Figure 9: Total US sales and fan chart forecast of soup, at current prices, 2010-20

Figure 10: Total US sales and forecast of soup, at current prices, 2010-20

Market Breakdown

Growth in wet stock/broth

Figure 11: Attitudes/Opinions About Food, any agree, May 2006-June 2015

Figure 12: Total US retail sales and forecast of wet broth/soup stock, at current prices, 2010-20

Refrigerated fresh, frozen soups enjoy growth

Figure 13: Total US retail sales and forecast of refrigerated fresh soup/frozen soup, at current prices, 2010-20

Flat sales in RTS wet, condensed wet, dry soups

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Soup - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 14: Total US retail sales and forecast of ready-to-serve wet soup, at current prices, 2010-20

Figure 15: Total US retail sales and forecast of condensed wet soup, at current prices, 2010-20

Figure 16: Total US retail sales and forecast of dry soup, at current prices, 2010-20

Organic soup enjoys growth in natural channel

Figure 17: Natural supermarket sales of soup, by organic ingredients, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Key Players – What You Need to Know

Gourmet, organic grow in RTE wet, refrigerated

Private label dominates in refrigerated

Bone broth helps boost wet stock/broth sales

Hispanic marketing helps bouillon sales

Manufacturer Sales of Soup

Overall, other companies, store brands enjoy growth

Figure 18: MULO sales of soup, by leading companies, rolling 52 weeks 2014 and 2015

Private label, other companies gain in wet broths/stocks

Figure 19: MULO sales of wet broth/stock, by leading companies and brands, rolling 52 weeks 2014 and 2015

Major companies, private brands see growth in refrigerated

Figure 20: MULO sales of refrigerated soup, by leading companies and brands, rolling 52 weeks 2014 and 2015

Despite declining sales, Campbell enjoys some success in organic, gourmet

Figure 21: MULO sales of ready to serve wet soup, by leading companies and brands, rolling 52 weeks 2014 and 2015

Condensed sales unimpressive, but organic, licensed options see some growth

Figure 22: MULO sales of condensed wet soup, by leading companies and brands, rolling 52 weeks 2014 and 2015

Knorr bouillon gains via Hispanic marketing

Figure 23: MULO sales of dry soup, by leading companies and brands, rolling 52 weeks 2014 and 2015

Campbell, Amy's, Heritage Family log strong sales in frozen

Figure 24: MULO sales of frozen soup, by leading companies and brands, rolling 52 weeks 2014 and 2015

What's Working?

Restaurant-inspired products winning in frozen soups

Figure 25: Campbell's Reserve frozen soups

Sales gain in organic RTS wet soup

Figure 26: Amy's Organic Soups

Unilever grows Knorr bouillon sales via Hispanic marketing

Figure 27: Knorr bouillon

Restaurant brand sales grow in refrigerated soup

Figure 28: Panera Bread refrigerated soup

What's Struggling?

High sodium, fat content hurt dry ramen sales

Figure 29: Maruchan Ramen Noodle Soup

What's Next?

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Soup - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Bone broths on the horizon

Refrigerated soup brands to increase focus on organic

The Consumer – What You Need to Know

Millennials more adventurous with their soups

Soup a snack option for Millennials, including Hispanics and parents

Boomers use soup as cooking ingredient, want healthy, comforting soups

Overall Soup Purchase

Nine in 10 consumers purchase soup

Figure 30: Age Group Purchased For, Any Type, August 2015

Condensed, RTE canned/boxed, RTU broth top three purchased soups

Figure 31: Age Group Purchased For, Any Purchase, August 2015

Women more likely to buy broth; Hispanics and Millennials strong accepters of all types

Figure 32: Age Group Purchased For - Any Purchase, by demographics, August 2015

Figure 33: Age Group Purchased For - Any Purchase, by demographics, August 2015

Figure 34: Age Group Purchased For - Any Purchase, by demographics, August 2015

Figure 35: Age Group Purchased For - Any Purchase, by demographics, August 2015

Soup Purchase Behavior

Overall buyers use soup as cooking ingredient, purchase it year-round

Figure 36: Soup Purchasing Behavior, August 2015

Dry soup, soup kits, refrigerated soup buyers want more customizable, healthful, filling soup

Figure 37: Soup Purchasing Behavior, by Age Group Purchased For, August 2015

Customization, functionality important to Millennials

Figure 38: Soup Purchasing Behavior, by demographics, August 2015

Baby Boomers more likely to use soup as ingredient, buy seasonal soups

Figure 39: Soup Purchasing Behavior, by demographics, August 2015

Millennial parents enjoy customizable, protein-rich soup

Figure 40: Soup Purchasing Behavior, by demographics, August 2015

Reasons for Not Purchasing Soup

Processed reputation main reason for soup's declined purchases

Figure 41: Reasons for Not Purchasing Soup, August 2015

Packaging Types

Millennials want suitable on-the-go packaging

Figure 42: Desirable Packaging Types, by demographics, August 2015

Boomers desire packaging that's easy to open, read

Figure 43: Desirable Packaging Types, by demographics, August 2015

Hispanics desire variety packs, packaging that eases preparation

Figure 44: Desirable Packaging Types, by demographics, August 2015

Millennial parents value wide variety of packaging options

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Soup - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 45: Desirable Packaging Types, by demographics, any rank, August 2015

Ideal Soup

Ideal soup traditional, but provides added health-related "boosts"

Figure 46: Ideal Soup, August 2015

Ideal Soup Attributes

Healthy, comforting most desired ideal soup attributes

Figure 47: Ideal Soup Attributes, August 2015

All usage groups see soup mostly as source of health, comfort

Figure 48: Ideal Soup Attributes, by Age Group Purchased For, Any Purchase, August 2015

Millennials want soups that energize, relax

Figure 49: Ideal Soup Attributes, by demographics, August 2015

Boomers want comforting, healthy soup

Figure 50: Ideal Soup Attributes, by demographics, August 2015

Hispanics, particularly Millennials, want energizing, relaxing soups

Figure 51: Ideal Soup Attributes, by demographics, August 2015

Ideal Soup Occasions

Ideal soup eaten overall as complete meal, mostly for lunch

Figure 52: Ideal Soup Eating Occasions, August 2015

Millennials see soup as a snack option

Figure 53: Ideal Soup Eating Occasions, by demographics, August 2015

Time-strapped Millennial parents snack on soup

Figure 54: Ideal Soup Eating Occasions, by demographics, August 2015

Hispanic Millennials more likely to see soup as a snack, on-the-go option

Figure 55: Ideal Soup Eating Occasions, by demographics, August 2015

Boomers more likely to eat ideal soup for lunch, dinner

Figure 56: Ideal Soup Eating Occasions, by demographics, August 2015

Soup Attitudes

Dry soup, soup kits, RTE refrigerated soup purchasers seek more unique offerings

Figure 57: Soup Attitudes - Any agree, by Age Group Purchased For, August 2015

Overall, soup buyers value healthy soup

Figure 58: Soup Attitudes, by demographics, August 2015

Millennials demand more from their soup

Figure 59: Soup Attitudes, by demographics, August 2015

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Soup - US - November 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Abbreviations and terms

Abbreviations

Terms

Appendix – Market

Figure 60: Total US retail sales and forecast of soup, at inflation-adjusted prices, 2010-20

Figure 61: Total US retail sales and forecast of soup, by segment, at current prices, 2010-20

Figure 62: Total US retail sales of soup, by segment, at current prices, 2013 and 2015

Figure 63: Total US retail sales and forecast of ready-to-serve wet soup, at inflation-adjusted prices, 2010-20

Figure 64: Total US retail sales and forecast of condensed wet soup, at inflation-adjusted prices, 2010-20

Figure 65: Total US retail sales and forecast of dry soup, at inflation-adjusted prices, 2010-20

Figure 66: Total US retail sales and forecast of wet broth/soup stock, at inflation-adjusted prices, 2010-20

Figure 67: Total US retail sales and forecast of refrigerated fresh soup/frozen soup, at inflation-adjusted prices, 2010-20

Figure 68: Total US retail sales of soup, by channel, at current prices, 2010-15

Figure 69: Total US retail sales of ready-to-serve soup, by channel, at current prices, 2010-15

Figure 70: Total US retail sales of condensed wet soup, by channel, at current prices, 2010-15

Figure 71: Total US retail sales of dry soup, by channel, at current prices, 2010-15

Figure 72: Total US retail sales of wet broth/soup stock, by channel, at current prices, 2010-15

Figure 73: Natural supermarket sales of soup, by type, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 74: Total US retail sales of refrigerated fresh soup/frozen soup, by channel, at current prices, 2010-15

Figure 75: Natural supermarket sales of soup, by gluten-free labeling/certification, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 76: Natural supermarket sales of soup, by presence of GMO ingredients, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Appendix – Consumer

Figure 77: canned/packaged soup, broth and stock; Dry soup and bouillon brands used within last 7 days, household, most often

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com