

Soup - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"The soup category struggled to increase sales significantly. The key barrier to growth is lack of frequency, stemming from habitual behavior and conflicting consumer issues with health. Brands may break consumer habits and inspire trial with free-from claims and health benefits, bundling and sampling programs, and convenient packaging.

- **Michael Averbook, Food & Drink Analyst**

This report looks at the following areas:

- Growing soups overshadowed by stagnant segments
- Frequent consumption is low
- Condensed soup in need of a refresh
- Disrupt consumer habits
- Reinforce soup category's range
- In-store communication
- Play up the wholesome
- Products flexible to consumers and needs

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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 soups overshadowed by stagnant segments

Figure 1: Total US sales and fan chart forecast of soup, at current prices, 2013-23

Frequent consumption is low

Figure 2: Soup consumption frequency, April 2018

Condensed soup in need of a refresh

Figure 3: Multi-outlet sales of condensed wet soup, rolling 52 weeks 2017 and 2018

The opportunities

Disrupt consumer habits

Figure 4: Soup behaviors – Brands and types/varieties, April 2018

Reinforce soup category's range

Figure 5: Correspondence analysis – Soup associations, April 2018

In-store communication

Figure 6: Soup discovery, April 2018

Play up the wholesome

Figure 7: Increased soup consumption drivers – Any rank and ranked 1, April 2018

Products flexible to consumers and needs

Figure 8: Multi-outlet sales of dry soup, dry broth/stock, wet broth/stock, and refrigerated fresh soup, rolling 52 weeks 2017 and 2018

What it means

The Market – What You Need to Know

Modest growth continues, but improvement expected

Foodservice and international inspiration

Refrigerated options

Market Size and Forecast

Mature category struggles to move the needle

Figure 9: Total US sales and fan chart forecast of soup, at current prices, 2013-23

Figure 10: Total US sales and forecast of soup, at current prices, 2013-23

Market Breakdown

Smaller soup segments driving category growth

Figure 11: Total US market share of soup, by segment, at current prices, 2016, 2018, and 2023

Figure 12: Total US retail sales and forecast of soup, by segment, at current prices, 2013-23

Supermarkets dominate soup sales

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 13: Total US market share of soup, by channel, at current prices, 2018

Market Perspective

Interest in international foods

Figure 14: Interest in international flavors by retail food, any interest, October 2017

Global varieties/flavors trending on menus

Figure 15: Soups – Select growing menu item cuisine types and flavors of ingredients, by menu incidence change, Q1 2016-18

Market Factors

Ambitions to eat cleaner, healthier

Figure 16: Lifestyle statements: attitudes/opinions about food and health – Any agree

Perimeter of store offerings meet current consumer demands

Figure 17: Attitudes toward the perimeter, any agree, April 2017

Mounting influence from younger adults

Figure 18: Population by generation, 2013-23

Rise of passionate cooks

Figure 19: Cooking segments, by cooking enthusiasts, September 2015 and September 2017

Key Players – What You Need to Know

Turnaround from the top

Campbell Soup sales fall

Rapid innovation keeps refrigerated soups cool

Old staples pivot on versatility, flexibility

Condensed soup pigeonholed as an ingredient, old fashioned

Packaging matters

Company and Brand Sales of Soup

Most large companies get back to growth

Large gains come from small and private label brands

Figure 20: Multi-outlet sales of soup, by leading companies, rolling 52 weeks 2017 and 2018

Top companies recover in RTS soup, falter in condensed

Figure 21: Multi-outlet sales of ready-to-serve wet soup and condensed wet soup, by leading companies, rolling 52 weeks 2017 and 2018

Ramen and frozen soup brands make a comeback

Figure 22: Multi-outlet sales of ramen and frozen soup, rolling 52 weeks 2017 and 2018

What's Working?

Refrigerated soups grow through packaging and flavor innovation

Figure 23: Launches of soup, by storage, shelf-stable, refrigerated, and frozen, 2014-17

Figure 24: O, That's Good! TV Advertisement: "Unrequited Love: Soups"

Figure 25: Multi-outlet sales of select growing refrigerated soup brands, rolling 52 weeks 2017 and 2018

Cooking made simpler

Figure 26: Multi-outlet sales of dry soup, dry broth/stock, and wet broth/stock, rolling 52 weeks 2017 and 2018

Figure 27: Bonafide Provisions: "Sundried Tomato Polenta Bites"

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 28: Multi-outlet sales of select growing dry soup brands, rolling 52 weeks 2017 and 2018

Figure 29: Multi-outlet sales of select growing wet broth/stock brands, rolling 52 weeks 2017 and 2018

Focused claims that demonstrate health

Figure 30: Launches of soup, by select natural and suitability claims, 2014-17

Figure 31: Multi-outlet sales of select growing soup brands, rolling 52 weeks 2017 and 2018

What's Struggling?

Condensed soup struggles with innovation, versatility, and health image

Figure 32: Multi-outlet sales of condensed wet soup, rolling 52 weeks 2017 and 2018

Figure 33: Purchase intent of select condensed soup products, January 2017-April 2018

"Healthy" is a four letter word

Figure 34: Multi-outlet sales of soup, by total brands with "health" or "healthy" in name, rolling 52 weeks 2017 and 2018

What's Next?

Glass packaging

Figure 35: Launches of shelf-stable soup, by packaging material, glass plain, 2014-17

Sippable soups

Figure 36: Launches of soup, by packaging type, bottled, 2014-17

International accents

Figure 37: Emerging international cuisine purchase, November 2017

Purely plants

Figure 38: Launches of soup, by vegan and dairy free, 2014-17

The Consumer – What You Need to Know

High penetration, problematic frequency

Canned soup holds the crown

Trial needed to break habits

Packaging can lead to discovery, trial

Desire for healthier soups

Soup Purchase and Consumption Frequency

Canned soup drives strong penetration

Figure 39: Soup purchase, April 2018

Room to increase frequency, especially among younger women

Figure 40: Soup consumption frequency, April 2018

Figure 41: Soup consumption frequency – At least once a week, by gender and age, April 2018

Older consumers stick to canned, young adults open to new formats

Figure 42: Soup purchase, by age, April 2018

Household size influences assortment

Figure 43: Soup purchase, by parental status, April 2018

Figure 44: Repertoire of soup purchase, by parental status and household size, April 2018

Cooking skills, experience influential to broth purchase

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 45: Soup purchase – Any broth and meal kits with ingredients for making soup, by parental status and gender, April 2018

Soup Behaviors

Routine behaviors benefit and challenge soup

Figure 46: Soup behaviors, April 2018

Soup seekers still looking for more

Figure 47: Soup behaviors – Purchase tendencies, by soup behaviors – Consumption versus last year and occasions, April 2018

Figure 48: Soup behaviors – Purchase tendencies, by soup consumption frequency – More than once a week, April 2018

Younger adults more experimental in the category

Figure 49: Soup behaviors, by generation, April 2018

Rural consumers habitual, city dwellers more experimental

Figure 50: Soup behaviors, by location, April 2018

Soup Discovery

In-store communication can lead to soup discovery

Figure 51: Soup discovery, April 2018

Frequent soup eaters/seekers find new products online

Figure 52: Soup consumption frequency – At least once a week, by soup discovery, April 2018

Figure 53: Soup behaviors – Often look for different types/varieties to try, by soup discovery, April 2018

Younger men discover soup across mediums

Figure 54: Soup discovery, by age and gender, April 2018

Hispanics, parents discover soups through friends and family

Figure 55: Soup discovery – Friends and family, by Hispanic origin and parental status, April 2018

Soup Associations

Emphasize diversity of strengths

Figure 56: Correspondence analysis – Soup associations, April 2018

Figure 57: Soup associations, April 2018

Convenience comes in many forms, especially for older women

Figure 58: Soup associations – Easy to use in recipes, convenient, versatile, and comforting, by gender and age, April 2018

Young adults still in discovery mode

Figure 59: Soup associations – Consumption occasions and filling, any soup, by age, April 2018

Soup Attitudes

Soups pair well

Figure 60: Soup attitudes – Good as side dish and more recipes, April 2018

Consumers stick with same brands even amid change

Figure 61: Soup attitudes – Switching brands, premium soups, unique soups, and healthy soups, April 2018

Flexibility of uses, quality ingredients important to parents

Figure 62: Soup attitudes – More recipes and premium soups, by parental status, April 2018

Increased Soup Consumption Drivers

Health takes on a new definition

**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 - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 63: Increased soup consumption drivers – Any rank and ranked 1, April 2018

Women looking for healthier soups

Figure 64: Increased soup consumption drivers – Health claims, recognizable ingredients, and functional benefits, any rank, by gender and age, April 2018

Larger households seek convenience and variety

Figure 65: Increased soup consumption drivers – any rank, by household size, April 2018

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Appendix – The Market

Figure 66: Total US retail sales and forecast of soup, at inflation-adjusted prices, 2013-23

Figure 67: Total US retail sales and forecast of soup, by segment, at current prices, 2013-23

Figure 68: Total US retail sales of soup, by segment, at current prices, 2016 and 2018

Figure 69: Total US retail sales and forecast of ready-to-serve wet soup, at current prices, 2013-23

Figure 70: Total US retail sales and forecast of ready-to-serve wet soup, at inflation-adjusted prices, 2013-23

Figure 71: Total US retail sales and forecast of condensed wet soup, at current prices, 2013-23

Figure 72: Total US retail sales and forecast of condensed wet soup, at inflation-adjusted prices, 2013-23

Figure 73: Total US retail sales and forecast of dry soup, at current prices, 2013-23

Figure 74: Total US retail sales and forecast of dry soup, at inflation-adjusted prices, 2013-23

Figure 75: Total US retail sales and forecast of wet broth/stock, at current prices, 2013-23

Figure 76: Total US retail sales and forecast of wet broth/stock, at inflation-adjusted prices, 2013-23

Figure 77: Total US retail sales and forecast of refrigerated fresh soup/frozen soup, at current prices, 2013-23

Figure 78: Total US retail sales and forecast of refrigerated fresh soup/frozen soup, at inflation-adjusted prices, 2013-23

Figure 79: Total US retail sales of soup, by channel, at current prices, 2013-18

Figure 80: Total US retail sales of soup, by channel, at current prices, 2016 and 2018

Figure 81: US supermarket sales of soup, at current prices, 2013-18

Figure 82: US sales of soup through other retail channels, at current prices, 2013-18

Appendix – Key Players

Figure 83: Multi-outlet sales of ready-to-serve wet soup, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 84: Multi-outlet sales of condensed wet soup, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 85: Multi-outlet sales of dry soup, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 86: Multi-outlet sales of wet broth/stock, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 87: Multi-outlet sales of refrigerated fresh soup/frozen soup, by leading companies and brands, rolling 52 weeks 2017 and 2018

**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