

Soup - US - 2023

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This report looks at the following areas:

- Types of soup purchased.
- Factors important in soup selection.
- When and how soup is eaten.
- Attributes associated with soup formats.

Soup remains a household staple, purchased by 91% of US adults and considered a shopping list constant for greater than a third of category participants. The category, particularly canned soup, is seen as affordable, convenient, and familiar, traits that carry extra weight and value amid heightened cost-consciousness spurred by inflation.

While broth has been a shopper sweetheart of late, benefitting from both dietary trends (eg gut health, collagen) and reliance on home cooking necessitated by pandemic restrictions, the dry soup segment is the mover of the moment, with leading and fast-growing brands including Asian-inspired formats, such as ramen. The segment overtook ready-to-serve wet soup in 2021 to take the top spot in the category in terms of dollar sales.

It's time for soup to dig its heels in as a healing food (associated with recovery from sickness) and to expand to being seen as a healthy food, delivering easy nourishment. Such a move will enhance permissibility and broaden consumption occasions, including soup for snacking. At present, 22% of soup shoppers turn to soup as a snack, increasing to 52% among young adult men and 70% among young adult women.

Flavor innovation is lacking in the category. While flavor (68%) is more important to soup choice than price (52%), only around a quarter of soup shoppers describe retail offerings as flavorful, and one in 10 describe canned soup as boring. Bold, spicy, and internationally inspired flavors and formats are in high demand and score the highest for excitement among soup launches.



“Brands must address soup’s paradox, renowned for healing, but not health, to prepare a new generation of soup fans for increased occasions. Affordability and convenience have sustained pandemic growth, but longstanding retention requires exciting flavor innovation and reframed health positioning.”

– Mimi Bonnett, Senior Director – US Food and Drink

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