

## Condiments and Dressings - US - December 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.



"Both the condiments and dressings categories have struggled to grow sales in recent years, impacted by competition from other categories including dips and sauces, and minimal innovation overall."

- Amanda Topper, Senior Food Analyst

This report looks at the following areas:

- Condiments and dressings categories struggle to grow sales
- Overlap in product usage
- Consumers split on healthfulness of condiments, dressings

Both the condiments and dressings categories have struggled to grow sales in recent years, impacted by competition from other categories including dips and sauces, and minimal innovation overall. Consumers are demanding products that are fresh, feature natural ingredients, and are customizable to their tastes and usage occasions. Both categories are expected to face further declines, when accounting for inflation, highlighting the importance of meeting consumer preferences with product innovation.

This report builds on the analysis presented in Mintel's *Condiments and Dressings – US, December 2014*, *Condiments – US, December 2013*, *August 2012*, *July 2010*, *July 2008*, *December 2006*, and earlier reports, and salad dressing analysis in Mintel's *Cooking Sauces, Marinades, and Dressings – US, December 2013*.

For the purposes of this report, condiments are defined as prepared sauces or spreads, requiring no preparation (including heating), used as a topping or accompaniment to prepared food. While variation exists, common use of these items is as a finishing topping or enhancement, not as a component in a recipe, and not necessarily considered to be eaten as a standalone item. The condiment should be understood to be an add-on, and not necessarily integral to the dish.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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

# Condiments and Dressings - US - December 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

Condiments and dressings categories struggle to grow sales

Figure 1: Total US sales and fan chart forecast of condiments, at current prices, 2010-20

Figure 2: Total US sales and fan chart forecast of dressing, at current prices, 2010-20

Overlap in product usage

Figure 3: Correspondence analysis – Using condiments, dressings, sauces, and marinades, September 2015

Consumers split on healthfulness of condiments, dressings

Figure 4: Attitudes toward condiments and dressings, September 2015

The opportunities

Focus on natural, free-from claims

Figure 5: Ideal condiment claims, by Millennials and Non-Millennials, September 2015

Emphasize product versatility and customization

Figure 6: Condiments and dressings use, September 2015

Boost simple, fresh, and organic options

Figure 7: Influential condiments and dressings features, September 2015

What it means

### The Market – What You Need to Know

Condiments and dressings sales fall flat

Category sales thriving in natural channels

Foodies, cooking enthusiasts key audiences for growth

### Market Size and Forecast

Condiment sales remain flat

Figure 8: Total US sales and fan chart forecast of condiments, at current prices, 2010-20

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

Figure 10: Total US sales and forecast of condiments, at inflation-adjusted prices, 2010-20

Dressings category struggles to grow sales

Figure 11: Total US sales and fan chart forecast of dressing, at current prices, 2010-20

Figure 12: Total US sales and forecast of dressing, at current prices, 2010-20

Figure 13: Total US sales and forecast of dressing, at inflation-adjusted prices, 2010-20

### Market Breakdown

Ketchup, mustard, mayonnaise account for less than half of category sales

Figure 14: Total US retail sales of condiments and dressings, by segment share, 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Condiments and Dressings - US - December 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 15: Total US retail sales and forecast of condiments, by segment, at current prices, 2010-15

**Nearly two thirds of condiments sales stem from supermarkets**

Figure 16: Total US retail sales of condiments, by channel, at current prices, 2010-15

**Supermarkets represent two thirds of dressing category sales**

Figure 17: Total US retail sales of dressings, by channel, at current prices, 2010-15

**Refrigerated condiments, organic, and gluten-free growing in natural channels**

Figure 18: Natural supermarket sales of condiments and dressings, by segment, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 19: Natural supermarket sales of condiments and dressings, by organic ingredients, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 20: Natural supermarket sales of condiments and dressings, by gluten-free labeling/certification, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

## Market Perspective

**Category blurring and crossover**

Figure 21: Condiments use, by usage of cooking sauces, marinades, and pasta sauces – Any use, September 2015

**Growth of retail-branded condiments on menus**

## Market Factors

**Home cooking, foodie mentality are drivers for product use**

Figure 22: Cooking frequency, by age, September 2015

Figure 23: Home cooking responsibility, by condiments use, September 2015

Figure 24: Condiments use by identification as a foodie, September 2015

Figure 25: Home cooking responsibility, by identification as a foodie, September 2015

**International population growth to influence consumer tastes**

Figure 26: Population by race and Hispanic origin, 2010-20

## Key Players – What You Need to Know

**Condiments and dressings categories highly fragmented**

**Heinz sees success with ketchup and mustard**

**Traditional dressing, mayonnaise brands face declines**

**Innovative flavors, BFY claims, and gourmet options across segments**

## Manufacturer Sales of Condiments and Dressings

**Condiments, dressings highly segmented**

Figure 27: Condiments and dressings product launches, by private label, 2010-15\*

**Manufacturer sales of condiments and dressings**

Figure 28: MULO sales of condiments and dressings, by leading companies, rolling 52 weeks 2014 and 2015

## What's Working?

**Heinz and French's condiment war**

Figure 29: MULO sales of Heinz mustard

Figure 30: Heinz TV Commercial, "Heinz Ketchup Got a New Mustard – The BBQ," April 2015

Figure 31: MULO sales of Heinz ketchup

Figure 32: French's TV Commercial, "French's Introduces NEW Ketchup, Free From High Fructose Corn Syrup," May 2015

Figure 33: Top 10 condiment product claims, September 2014-15

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

## Condiments and Dressings - US - December 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.

### Pickles, olive brands experience growth

Figure 34: MULO sales of select olive brands

### Hot sauce is hot

Figure 35: MULO sales of Frank's RedHot

Figure 36: MULO sales of Huy Fong Foods

Figure 37: MULO sales of Cholula

Figure 38: MULO sales of private label other sauces

### What's Struggling?

#### Dressing declines

Figure 39: MULO sales of Wish-Bone dressing

Figure 40: MULO sales of Kraft salad dressing

Figure 41: MULO sales of private label salad dressing

#### Traditional mustard brands' market shares negatively impacted

Figure 42: MULO sales of French's mustard and Gulden's mustard

#### Mainstream mayonnaise declines

Figure 43: Hellmann's TV Commercial, "1,000 Pounds of Mayonnaise. Gone." June 2015

Figure 44: MULO sales of Unilever and Kraft Foods Group mayonnaise

### What's Next?

Restaurant and foodservice brands

Segment blurring

Upscale and gourmet

International influences

Pickling for digestive health

### The Consumer – What You Need to Know

Condiments use remains fairly consistent

Customization plays an important role

Categories not exempt from broader health trends

### Condiments and Dressings Use

#### Specialty condiments, spicy flavors appealing

Figure 45: Condiments use, September 2015

#### 25-44s are flavor and spice seekers

Figure 46: Condiments use, by age, September 2015

#### Similar use across income groups

Figure 47: Condiments use, by household income, September 2015

#### Hispanics more likely to use spicy condiments

Figure 48: Condiments use, by race and Hispanic origin, September 2015

### Reasons for Using

Opportunity to boost sophistication, customization

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Condiments and Dressings - US - December 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 49: Correspondence analysis – Using condiments, dressings, sauces, and marinades, September 2015

Figure 50: Using condiments, dressings, sauces, and marinades, September 2015

**Millennials use condiments to add sophistication, specific flavors to dishes**

Figure 51: Using condiments (eg ketchup, mayonnaise), by Millennials and Non-Millennials, September 2015

**Hispanics use condiments to customize recipes**

Figure 52: Using condiments (eg ketchup, mayonnaise), by Hispanic origin, September 2015

**Men more calorie conscious with dressings**

Figure 53: Using dressings, by gender, September 2015

## The Ideal Condiment

**Ideal condiment is savory and spicy, American, and additive-free**

Figure 54: Ideal Condiment, September 2015

**Flavor**

Figure 55: Ideal condiment flavor, September 2015

**International influence**

Figure 56: Ideal condiment international influence, by race and Hispanic origin, September 2015

**Claims**

Figure 57: Ideal condiment claims, by Millennials and Non-Millennials, September 2015

**Packaging**

Figure 58: Ideal condiment packaging, September 2015

Figure 59: Top condiment package types, September 2014-15

## Condiments and Dressings Behaviors

**Customization is vital**

Figure 60: Condiments and dressings use, September 2015

Figure 61: Condiments and dressings shopping behavior, September 2015

Figure 62: Condiments and dressings shopping behavior – agree, by parental status, September 2015

**Hot sauces use is very diverse**

Figure 63: Condiments and dressings use – agree, by condiments use, September 2015

**Retail opportunities for reaching Hispanics**

Figure 64: Select condiments and dressings use and shopping behavior – agree, by race and Hispanic origin, September 2015

## Influential Features

**Simplicity is key**

Figure 65: Influential condiments and dressings features, September 2015

Figure 66: Condiments and dressings with an organic claim, September 2010-15

**Millennials prefer fresh, Boomers more ingredient conscious**

Figure 67: Select influential condiments and dressings features, by generation, September 2015

**Parents, Hispanics value fresh, organic**

Figure 68: Influential condiments and dressings features, by parental status, September 2015

Figure 69: Influential condiments and dressings features, by race and Hispanic origin, September 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Condiments and Dressings - US - December 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.

## Attitudes toward Condiments and Dressings

Opportunities for flavor, packaging innovation

Flavor

Figure 70: Attitudes toward condiments and dressings, September 2015

Figure 71: Select attitudes toward condiments and dressings, by Millennials and non-Millennials, September 2015

Packaging

Figure 72: Attitudes toward condiments and dressings, September 2015

Nutrition/health

Figure 73: Attitudes toward condiments and dressings, September 2015

Innovation opportunities

Figure 74: Attitudes toward condiments and dressings, September 2015

Hispanics have more positive health perceptions

Figure 75: Select attitudes toward condiments and dressings, by race and Hispanic origin, September 2015

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

## Appendix – Market

Condiments

Figure 76: Total US retail sales and forecast of condiments, by segment, at current prices, 2010-20

Figure 77: Total US retail sales of condiments, by segment, at current prices, 2013 and 2015

Figure 78: Total US retail sales and forecast of mayonnaise, at current prices, 2010-20

Figure 79: Total US retail sales and forecast of mustard, at current prices, 2010-20

Figure 80: Total US retail sales and forecast of ketchup, at current prices, 2010-20

Figure 81: Total US retail sales and forecast of pickles, olives, and relish, at current prices, 2010-20

Figure 82: Total US retail sales and forecast of other condiments, at current prices, 2010-20

Figure 83: Total US retail sales of condiments, by channel, at current prices, 2013 and 2015

Figure 84: US supermarket sales of condiments, at current prices, 2010-15

Figure 85: US sales of condiments through other retail channels, at current prices, 2010-15

Dressings

Figure 86: Total US retail sales of dressings, by channel, at current prices, 2013 and 2015

Figure 87: US supermarket sales of dressings, at current prices, 2010-15

Figure 88: US sales of dressings through other retail channels, at current prices, 2010-15

Natural channel sales data

Figure 89: Natural supermarket sales of condiments and dressings, at current prices, rolling 52 weeks 9/8/13-9/6/15

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Condiments and Dressings - US - December 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 90: Natural supermarket sales of condiments and dressings, by brand positioning, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 91: Natural supermarket sales of dressings, by fat content, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 92: Natural supermarket sales of condiments and dressings, by storage, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 93: Natural supermarket sales of mayonnaise, by vegan status, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

Figure 94: Natural supermarket sales of condiments and dressings, by ethnicity, at current prices, rolling 52 weeks ending 9/8/13 and 9/6/15

## Appendix – Key Players

Figure 95: MULO sales of mayonnaise, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 96: MULO sales of mustard, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 97: MULO sales of ketchup, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 98: MULO sales of pickles, olives and relish, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 99: MULO sales of other\* sauces, by leading companies and brands, rolling 52 weeks 2014 and 2015

Figure 100: MULO sales of salad dressings, by leading companies and brands, rolling 52 weeks 2014 and 2015

## Appendix – Correspondence Analysis

Methodology

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)