

Condiments - US - December 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

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



Condiments and dressings are substantial and diverse categories with extremely high penetration driven by consumer loyalty to brands and product types, along with healthy reputations for adaptability, affordability, and variety. As these mature categories struggle to grow sales, getting back to growth will take effort from brands to find even more ways for consumers to enjoy or experiment with condiments and dressings.

This report looks at the following areas:

- Condiments stalled by decline in mustard and mayonnaise
- Dressings decline driven by struggling shelf-stable
- Category overlap an issue and an opportunity
- Traditional condiments, dressings are pantry staples

Future growth opportunities may exist for brands that communicate alternative product uses on social media or websites, and those that innovate in complex flavor combinations, convenient packaging, and fresher and healthier varieties.

**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

Condiments - US - December 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

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 stalled by decline in mustard and mayonnaise

Figure 1: Total US sales and fan chart forecast of condiments, at current prices, 2011-22

Dressings decline driven by struggling shelf-stable

Figure 2: Total US sales and fan chart forecast of dressings, at current prices, 2011-22

Category overlap an issue and an opportunity

Figure 3: Total US retail sales percent change of pasta sauce, barbecue sauce, and other sauces and gravy, 2015-17*

Traditional condiments, dressings are pantry staples

Figure 4: Condiment and dressing purchase, any store, October 2017

The opportunities

Communicate categories' strengths, crossover potential, and quality

Figure 5: Condiment and dressing attitudes, October 2017

Interest in exciting flavor combinations

Figure 6: Condiment and dressing innovation, flavors, October 2017

What it means

The Market – What You Need to Know

Condiment growth stifled high penetration, competitive categories

Dressings sluggish due to shelf-stable dressings

Category blurring creates competitive pressure

Growing number of consumers enjoy cooking

Market Size and Forecast

Sales of condiments are stagnant

Figure 7: Total US sales and fan chart forecast of condiments, at current prices, 2011-22

Figure 8: Total US retail sales and forecast of condiments, at current prices, 2012-22

Dressing sales drop

Figure 9: Total US sales and fan chart forecast of salad dressings, at current prices, 2011-21

Figure 10: Total US retail sales and forecast of dressings, at current prices, 2012-22

Market Breakdown

Pickles, olives, and relish is largest segment

Figure 11: Total US market share of condiments and dressings, by segment, 2017

Traditional condiments struggle

Non-sauce condiments experience moderate growth

**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

Condiments - US - December 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

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

Hot sauces spur other condiments growth

Figure 12: Total US retail sales and forecast of condiments, by segment, at current prices, 2012-22

Refrigerated dressing growth can't make up for shelf-stable decline

Figure 13: Total US retail sales and forecast of shelf-stable and refrigerated salad dressings, rolling 52 weeks 2016 and 2017

Supermarkets dominate sales of condiments and dressings

Figure 14: Total US market share of condiments and dressings, by channel, at current prices, 2017

Market Perspective

Competition from other sauces, marinades, and dips

Figure 15: Total US retail sales percent change of pasta sauce, barbecue sauce, and other sauces and gravy, 2015-17*

Sales of international foods grow in the US

Figure 16: Total US retail sales and forecast of international foods, at current prices, 2014-16

Menu inspiration

Figure 17: Condiment ingredients, by menu incidence change, Q3 2015-Q3 2017

Figure 18: Condiment flavor of ingredients, by ketchup, mustard, mayonnaise, and hot sauce, by menu incidence change, Q3 2015-Q3 2017

Market Factors

Growing passion for cooking

Figure 19: Share and approximate number* of Cooking Enthusiasts, 2015-17

Americans are heavy snackers

Figure 20: Snacking frequency, March 2017

Key Players – What You Need to Know

Kraft Heinz domination

Unilever joins the battle

Interest in fresh benefits chilled condiments and dressings

Spicy sauces heat up sales

Big brands in traditional segments weaken

Sweet, heat, and sour

Company and Brand Sales of Condiments and Dressings

Kraft Heinz leads category with wide product range

Figure 21: MULO market share of ketchup, mayonnaise, mustard, other condiments, dressing, and pickles, olives, and relish, by leading companies, 52-weeks ending Sep 10, 2017

Figure 22: MULO sales of condiments and dressings, by leading companies, rolling 52 weeks 2016 and 2017

What's Working?

McCormick, Unilever enter the condiment war

Figure 23: MULO sales of ketchup and mustard, by French's and Heinz, rolling 52-weeks 2016 and 2017

Refrigerated dressing, pickles/relish outperform shelf-stable varieties

Figure 24: MULO sales percent change of refrigerated relish/pickles, pickles/relish/olives, refrigerated salad dressings, and shelf-stable salad dressings, rolling 52 weeks 2016 and 2017

Sales of spicy sauces on fire

Figure 25: MULO sales of hot/Cajun sauce and horseradish sauce, by Frank's RedHot, McIlhenny Company, Cholula, and Inglehoffer, rolling 52-weeks 2016 and 2017

Figure 26: Launches of condiments and dressings, by flavor components, spice/spicy/piquant and hot, 2015-17*

**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

Condiments - US - December 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

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

Feel good flavorings

Figure 27: Launches of condiments and dressings, by claims, no additives/preservatives, GMO-free, and organic, 2015-17*

Figure 28: TV Advertisement – “Our Mayonnaise is Now Made With 100% Cage-Free Eggs!” – Hellmann’s

What’s Struggling?

Mainstream mayonnaise struggles

Figure 29: TV Advertisement – “Costume Party” – Kraft Mayo

Figure 30: MULO sales of mayonnaise, by declining brands, Heinz, Kraft, Best Foods, and Hellmann’s, rolling 52-weeks 2016 and 2017

Mustard in a sales slump

Figure 31: MULO sales of mustard, by declining brands, Guldens, French’s, and Grey Poupon, rolling 52-weeks 2016 and 2017

Downturn for dressing

Figure 32: MULO sales of dressing, by declining brands, Kraft, Wishbone, and Marzetti, rolling 52-weeks 2016 and 2017

Store brands struggle in many segments

Figure 33: MULO sales of mayonnaise, salad dressing, and pickles, olives and relish, by private label brands, rolling 52 weeks 2016 and 2017

What’s Next?

Sweet heat, sour power

Figure 34: Launches of condiments and dressings, by flavor component groups, sweet and sour, 2015-17*

Peculiar peppers

Craveable Korean

Portable portions

Figure 35: Launches of condiments and dressings, by convenience claims, ease of use and on-the-go, 2015-17*

The Consumer – What You Need to Know

Growth potential challenged by nearly universal participation

Flavor an imperative factor for purchase

Stellar reputation for versatility, affordability

Category definition blurry to consumers

Condiment and Dressing Purchase

Price, variety, and versatility drive high penetration

Figure 36: Condiment and dressing purchase, any store, October 2017

Figure 37: Repertoire of condiment and dressing purchase, Any store, October 2017

Supermarkets are primary purchase location

Figure 38: Condiment and dressing purchase, all store types, October 2017

Women prefer creamy products, men flavored varieties

Figure 39: Condiment and dressing purchase, any store, by gender, October 2017

Young adults purchase across wide variety of products, stores

Figure 40: Condiment and dressing purchase, any store, by age, October 2017

Figure 41: Condiment and dressing purchase, any condiment or dressing, all stores types, by age, October 2017

Larger households seek variety

Figure 42: Condiment and dressing purchase, any store, by parental status, October 2017

**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

Condiments - US - December 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

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

Condiment and Dressing Behavior

Condiments and dressings resourceful for pepping up food

Figure 43: Condiment and dressing behavior, October 2017

Flavored condiment buyers more active in the category

Figure 44: Condiment and dressing purchase, any store, by condiment and dressing behavior, October 2017

Women value familiarity, men look for variety

Figure 45: Condiment and dressing behavior, by gender, October 2017

Older consumers are brand loyal, younger consumers experiment

Figure 46: Condiment and dressing behavior, by age, October 2017

Condiment and Dressing Uses

Category's diversity leads to wide range of uses

Figure 47: Correspondence analysis – Condiment and dressing uses, October 2017

Figure 48: Condiment and dressing uses, October 2017

Young adults appreciate range of hot sauce uses

Figure 49: Condiment and dressing uses, any condiment or dressing, by age, October 2017

Condiments and dressings address many needs for parents

Figure 50: Condiment and dressing uses, any condiment or dressing, by parental status, October 2017

Spiciness, versatility of hot sauce appeals to Hispanic, Black consumers

Figure 51: Condiment and dressing uses, hot sauce, by race and Hispanic origin, October 2017

Condiment and Dressing Attributes

Flavor far and away most critical

Figure 52: Condiment and dressing attributes, October 2017

Life stage plays role in types of attributes looked for

Figure 53: Condiment and dressing attributes, by age, October 2017

Black consumers place priority on brand, Asians on health

Figure 54: Condiment and dressing attributes, by race and Hispanic origin, October 2017

Condiment and Dressing Attitudes

Condiments, dressings helpful in variety of ways to everyone

Figure 55: Condiment and dressing attitudes, October 2017

Women enjoy adaptability, young adults interested in unique options

Figure 56: Condiment and dressing attitudes, by gender and age, October 2017

Affordability, diversity shines in categories

Figure 57: Condiment and dressing attitudes, by number of children under 18 in household, October 2017

Hispanics enjoy flavoring foods with inexpensive condiments, dressings

Figure 58: Condiment and dressing attitudes, by Hispanic origin, October 2017

Condiment and Dressing Innovation

Interest in options that further increase variety and versatility

Figure 59: Condiment and dressing Innovation, October 2017

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

Condiments - US - December 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

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

Variety of flexible, flavored, and fresh offerings an optimal assortment

Figure 60: TURF analysis – Condiment and dressing innovation, October 2017

Women interested in flexible products, men in diverse flavors

Figure 61: Condiment and dressing Innovation, by gender, October 2017

Young consumers, parents, Hispanics look for wide range of innovation

Figure 62: Condiment and dressing Innovation, by age, parental status, and Hispanic origin, October 2017

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 63: Total US retail sales and forecast of condiments, at inflation-adjusted prices, 2012-22

Figure 64: Total US retail sales and forecast of condiments, by segment, at current prices, 2012-22

Figure 65: Total US retail sales of condiments, by segment, at current prices, 2015 and 2017

Figure 66: Total US retail sales and forecast of mayonnaise, at current prices, 2012-22

Figure 67: Total US retail sales and forecast of mayonnaise, at inflation-adjusted prices, 2012-22

Figure 68: Total US retail sales and forecast of mustard, at current prices, 2012-22

Figure 69: Total US retail sales and forecast of mustard, at inflation-adjusted prices, 2012-22

Figure 70: Total US retail sales and forecast of ketchup, at current prices, 2012-22

Figure 71: Total US retail sales and forecast of ketchup, at inflation-adjusted prices, 2012-22

Figure 72: Total US retail sales and forecast of pickles, olives, relish, at current prices, 2012-22

Figure 73: Total US retail sales and forecast of pickles, olives, relish, at inflation-adjusted prices, 2012-22

Figure 74: Total US retail sales and forecast of other condiments, at current prices, 2012-22

Figure 75: Total US retail sales and forecast of other condiments, at inflation-adjusted prices, 2012-22

Figure 76: Total US retail sales of condiments, by channel, at current prices, 2012-17

Figure 77: Total US retail sales of condiments, by channel, at current prices, 2015 and 2017

Figure 78: US supermarket sales of condiments, at current prices, 2012-17

Figure 79: US sales of condiments through other retail channels, at current prices, 2012-17

Figure 80: Total US retail sales and forecast of dressings, at inflation-adjusted prices, 2012-22

Figure 81: Total US retail sales of dressings, by channel, at current prices, 2012-17

Figure 82: Total US retail sales of dressings, by channel, at current prices, 2015 and 2017

Figure 83: US supermarket sales of dressings, at current prices, 2012-17

Figure 84: US sales of dressings through other retail channels, at current prices, 2012-17

Appendix – Key Players

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

Condiments - US - December 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

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

Figure 85: MULO sales of mayonnaise, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 86: MULO sales of mustard, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 87: MULO sales of ketchup, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 88: MULO sales of pickles, olives and relish, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 89: MULO sales of other sauces*, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 90: MULO sales of salad dressings, by leading companies and brands, rolling 52 weeks 2016 and 2017

**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