

Condiments - US - December 2013

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“Competition from away-from-home dining, coupled with consumer health concerns, can potentially hinder future condiment category growth. However, the increasingly blurred lines between condiments, cooking sauces, and dressings present an opportunity for product development, flavor innovation, and the marketing of expanded usage occasions.”

– Amanda Topper, Food Analyst

This report looks at the following areas:

- How can the highly saturated market continue to appeal to consumers?
- How will increases in away-from-home food spending impact the market?
- Will health concerns negatively impact consumer condiment use?

The \$5.6 billion US condiment industry has grown 10% from 2008-13 as greater interest in eating at home in the post-recession economy helped boost sales.

While growth was largest in the period immediately following the onset of the recession, the category is now challenged to increase sales as household penetration rates of many condiments have stabilized. Greater competition from increased away-from-home spending on food also will impact the category. Consumer interest in condiments with health-based claims, as well as hot and spicy flavors, will help drive product innovation. Further, the increasingly blurred lines between condiments, sauces, and dressings will help create expanded usage occasions across the category's segments.

Looking ahead, the market is expected to decline 12% from 2013-18, when accounting for inflation.

Mintel here provides a comprehensive analysis of the following factors that have the greatest potential to impact the category's performance:

- How different condiment segments have been performing in recent years, and how new product innovation (including foodservice) is impacting sales trends for the category as a whole, and in each of its segments
- Which brands are gaining, which are losing, and why within the market
- Current product positioning (including TV ads, online and digital promotional efforts) and what marketing strategies make the most sense given the various target audiences that manufacturers are trying to connect with to maximize sales opportunities
- How condiments factor into home meal preparation and their distinctive appeal to different consumer demographics
- The effects of nutritional issues, such as concerns about gluten and sodium, and their impact on consumer behavior
- Flavor preferences by condiment type and whether there are standard flavors that interest consumers

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DID YOU KNOW?

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

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- The attitudes and behaviors of condiment users, including purchase decision criteria, foods used with condiments, and more

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