

## Condiments and Dressings - UK - January 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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“Wider trends in the food market, such as consumers’ appetite for emerging cuisines, have impacted usage of condiments/dressings. While this has hit sales of dish-specific sauces, NPD in mayonnaise inspired by hot and spicy flavours has re-energised the segment.”

– **Alyson Parkes, Research Analyst**

This report looks at the following areas:

- **Dish-specific sauces need new usage occasions as traditional dishes lose favour**
- **Ethical credentials can provide a point of difference for condiments and dressings**
- **Fermented condiments could provide much-needed boost for pickles segment**

Total sales of table sauces, pickles, chutneys and relishes grew over 2012-17. This, however, masks variations across different categories, with only half of segments seeing value sales increase. The growth of own-label condiments/dressings contributed to this by ramping up pressure on brands and driving values down.

Volume sales for the largest segment – thick table sauces – have been hit by wider trends in the overall food market. Customers actively reducing their consumption of key carrier products, such as processed meat, has curbed usage of ketchup and brown sauce in particular.

Interest in emerging cuisines has proved a double-edged sword for the market. Sales of dish-specific sauces have continued on a downward trajectory, however, NPD (New Product Development) in mayonnaise inspired by hot and spicy flavours has provided a boost for the segment. Pairing suggestions for dish-specific sauces outside their traditional accompaniments offer a means to re-engage consumers.

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### DID YOU KNOW?

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The implications

Ethical credentials can provide a point of difference for condiments and dressings

The facts

The implications

Fermented condiments could provide much-needed boost for pickles segment

The facts

The implications

## The Market – What You Need to Know

Modest value growth masks underlying declines over 2012-17

Volume decline continues in table sauces in 2017

Volume sales pick up in pickles, chutneys and relishes category

Meat reduction and love of world foods stand to curb table sauce usage

Inflation fuels price rises; consumer incomes squeezed

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Healthy eating is widespread  
 Meat reduction could curb table sauce usage...  
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 Table sauces lead 2017 launches  
 Flavour innovation in mayonnaise and ketchup launches  
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Hellmann's unveils honey-sweetened and red & green ketchups  
 Unusual flavours from ethical brand Rubies in the Rubble  
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Usage of condiments and dressings is almost universal

Younger age groups eat hot/spicy sauces; over-55s drive dish-specific sauce usage

Two thirds use condiments/dressings in a variety of ways

Sizeable interest in fermented condiments

Wider availability of free-from condiments appeals to four in 10

Major brands are the most closely associated with positive attributes

Pairing suggestions outside traditional dishes spark interest

## Usage of Condiments and Dressings

Usage of condiments and dressings is almost universal

Thick table sauces lead

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Younger age groups eat hot/spicy sauces

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Sizeable interest in fermented condiments

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