

Flavors and Ingredients in Dips and Sauces: Incl Impact of COVID-19 - US - April 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Dips and sauces of all types play a critical role: to make foods taste better. In this unprecedented time of COVID-19, as Americans are hunkered down at home, cooking and snacking, enjoyment, good taste and small comforts are more important than ever."

– **Mimi Bonnett, Food and Drink Research Director**

This report looks at the following areas:

- How the COVID-19 pandemic is impacting food shopping, preparation and consumption and use of dips and sauces
- How brands are helping consumers keep meal and snack time exciting
- "Go-to" flavors of dip and sauces
- What's next in flavors and ingredients for dips and sauces

Dips and sauces of all types play a critical role for consumers: to make foods taste better. In this unprecedented time of COVID-19, as Americans are hunkered down cooking and snacking at home, good taste and small comforts are more important than ever. This report looks across product categories to examine flavor and ingredient trends with dips, sauces, condiments and dressings, among others. We take a "now, near, next" approach to analyzing attitudes and usage when it comes to consumption patterns, consumer interest and awareness in flavors and ingredients. Providing this perspective provides opportunities for product development activities that can guide brands through in this unique era and through the challenging times ahead.

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

Flavors and Ingredients in Dips and Sauces: Incl Impact of COVID-19 - US - April 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 1: Short, medium and long term impact of COVID-19 on dips and sauces april 2020

Overview

Figure 2: Dips and sauces consumed, January 2020

Top takeaways

Competitive pressure within the super-category

Figure 3: Dip and sauce uses, January 2020

Dips are essential, yet occasion based

Figure 4: Attitudes toward dips and sauces, January 2020

The average household "pantry" looks like this . . .

Figure 5: TURF Analysis – go-to flavors, January 2020

Familiar, yet innovative flavors are sticky

Figure 6: Dip/sauce flavor experience and interest, tier 2 flavors, January 2020

Under 45s are enthusiastic flavor explorers

Figure 7: Dip/sauce flavor experience and interest, tier 3 flavors, by age, January 2020

The Impact of COVID-19 on Trending Flavors and Ingredients in Dips and Sauces

What you need to know:

Figure 8: Short, medium and long term impact of COVID-19 on dips and sauces april 2020

Opportunities and Threats

America: at home, and eating

Dips are essential, yet occasion based

Figure 9: COVID-19 Tracker, Future activities, April 16-24, 2020

Shoppers' shifts from spontaneity to stocking up could stick

eCommerce and DTC are natural fits for dips and sauces

Staying close to home may mean sticking with flavor favorites...

Figure 10: TURF Analysis – go-to flavors, January 2020

...but brand exploration may be inevitable

Figure 11: Important condiment and dressing attributes, September 2019

Social media can play a big role in what flavor(s) comes next

Versatility = value

Impact on the Dips/Sauces market

Growth categories have connections with snacking, but will likely bleed into meals

Figure 12: Total US retail sales of dips, sauces and marinades, at current prices, 2014-2019

Dips and Sauces support consumers via Experience

**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

Flavors and Ingredients in Dips and Sauces: Incl Impact of COVID-19 - US - April 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

How the crisis will affect key consumer segments in the Dips and Sauces category

Millennials, Gen Z will likely need the most attention

Dips and sauces are essential to Adventure Eaters and Value Chasers

Figure 13: Experience and interest in Flavors, Adventure eaters, Tried it and liked it, January 2020

Figure 14: Experience and interest in Flavors, Value Chasers, Tried it and liked it, January 2020

How a COVID-19 recession will reshape Dips and Sauces

Private label already poised for success

Figure 15: Private label share of multi-outlet food and drink sales, 2014-19

Foodservice re-openings will be met with reluctance from some

Figure 16: Dip/sauce flavor experience and interest, tier 3 flavors by age, January 2020

COVID-19: US context

Market Landscape – What You Need to Know

Growth tied to snacking, line extensions

Products blur across category and segment

Tapping global flavor experiences to drive interest

State of the Market

Growth categories have connections with snacking

Figure 17: Total US retail sales of dips, sauces and marinades, at current prices, 2014-2019

Figure 18: Percent change in sales of dips, sauces and marinades, at current prices, 2017-2019

Brands are staying close to home

Figure 19: change in new product launches by type, 2017 -19

Dips are essential, yet occasion based

Figure 20: Attitudes toward dips and sauces, January 2020

Condiments lead product types consumed

Figure 21: Dips and sauces consumed, January 2020

Two thirds of adults like to dip

Figure 22: Dips and sauce use, January 2020

Younger adults most likely to use dips/sauces in a variety of ways

Figure 23: Dips and sauce use, by age, January 2020

The average household pantry looks like this . . .

Figure 24: TURF analysis – go-to flavors, January 2020

The lines between dips, sauces, marinades and condiments are blurred

Figure 25: Dips and sauces consumed, by dip and sauce uses, January 2020

Market Drivers

Mintel Trend drivers – mapping the catalyst of change

For dips, spreads, sauces and condiments it's all about the flavor

Figure 26: Important condiment and dressing attributes, September 2019

Figure 27: Dips and spreads behaviors, January 2020

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

Flavors and Ingredients in Dips and Sauces: Incl Impact of COVID-19 - US - April 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Versatility = value

Figure 28: Condiment and dressing attitudes, October 2017

Taste plus wellbeing inspires trial for dips and sauces of all types

Figure 29: New dip/spread trial, January 2020

Figure 30: Increased spend for condiments/dressings, October 2019

Foodservice menus point to new paths to excitement

Figure 31: Menu incidence Q4 2016-Q4 2019 (number of menu mentions)

The future is flavorful

Figure 32: Correspondence Analysis – Symmetrical map – Flavor innovation, January 2020

Figure 33: Flavor innovation, January 2020

Brand Landscape – What You Need to Know

Now: Flavor blends and interesting ingredients

Near: Leveraging healthy ingredients and positioning

Next: Global and local flavors/ingredients

Product Development: Now – Current Flavor Trends

Classic flavors top the go-to list

Figure 34: Primary dip and sauce flavors consumed, January 2020

Product trend: Brands play it safe with range extensions

Product trend: Hot takes on classics

Figure 35: Attitudes about dips/sauces, January 2020

Brands in action

Product trend: Sweet heat takes new forms

Brands in action

Product Development: Near – What to Watch For

Product trend: Getting functional

Figure 36: Dips and sauce product launches, by top-10 claim categories, 2018-19

Brands in action

Product trend: Something borrowed

Brands in action

Product trend: Crossing category lines

Brands in action

Product trend: Power to the plants

Brands in action

Specialty diets don't have to be flavorless

Figure 37: Opinions on diet trends, by age, September 2019

Brands in action

Product Development: Next – What's in the Pipeline

Global flavors push boundaries

**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

Flavors and Ingredients in Dips and Sauces: Incl Impact of COVID-19 - US - April 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 38: Emerging international cuisine consumption, February 2020

Brands in action

The ethical expectation

Product trend: In a pickle

Figure 39: Attitudes about fermented condiments, November 2019

The Consumer – What You Need to Know

Dips/sauces can elevate everyday dishes

A fifth of adults will go out of their way to try new flavors

Ranch tops the list as favorite dip/sauce flavor

Consumers are looking beyond basic flavors

Less-conventional flavors will take some work

Attitudes toward Dips and Sauces

Dips/sauces are essential to improving taste

Figure 40: Attitudes toward dips and sauces, January 2020

18-24s think dips/sauces are essential; social media provides inspiration

Figure 41: Attitudes toward dips and sauces, by age, January 2020

Adventure Eaters emerge as important consumer of dips/sauces

Figure 42: Attitudes toward dips and sauces, by food and drink shopper segmentation, January 2020

Approach to New Flavor Trial

Majority of adults are willing to try new flavors

Figure 43: Interest in trying new flavors, January 2020

Niche young cohorts as ideal target for flavor innovation

Figure 44: Interest in trying new flavors, by select demographics, November 2019

Adventure Eaters seek out bold flavors, unique ingredients

Figure 45: Interest in trying new flavors, by food and drink shopper segmentation, November 2019

Now: Dip/Sauce Flavors Consumed

Ranch is the most consumed dip/sauce flavor

Figure 46: Dip and sauce flavors consumed, January 2020

Middle-age consumers enjoy a variety of dip/sauce flavors

Figure 47: Dip and sauce flavors consumed, by age, January 2020

Culturally diverse consumers have the most diverse palates

Figure 48: Dip and sauce flavors consumed, by race/Hispanic origin, January 2020

Near: Dip/Sauce Flavor Experience and Interest

Moving beyond mainstream

Figure 49: Dip/sauce flavor experience and interest, tier 2 flavors, January 2020

Young adults try flavors and like them, particularly hot/spicy

Figure 50: Dip/sauce flavor experience and interest, tier 2 flavors, by age, January 2020

**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

Flavors and Ingredients in Dips and Sauces: Incl Impact of COVID-19 - US - April 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Next: Dip/Sauce Flavor Experience and Interest

Flavor obscurity plays a role in experience and interest

Figure 51: Dip/sauce flavor experience and interest, tier 3 flavors, January 2020

Young adults willing to try unique, international flavors

Figure 52: Dip/sauce flavor experience and interest, tier 3 flavors by age, January 2020

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Mintel Food and Drink Shopper Segmentation

Purchase Intelligence

Abbreviations and terms

Abbreviations

Appendix – The Consumer

Figure 53: Flavor innovation, January 2020

Methodology

**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