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# Condiments & Sauces: United States

June 2017



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# About This Report

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## Scope & Method

This report forecasts annual US retail sales of condiments and sauces in US dollars for 2017-2021. Total retail sales of condiments are segmented by product in terms of:

- salad dressing
- nut butters
- mayonnaise
- ketchup and mustard
- spreads
- other products such as tartar sauce, horseradish sauce, and hot sauce.

Total retail sales of sauces are segmented by product in terms of:

- Italian
- Mexican
- barbeque
- Asian
- other products such as dairy/cheese sauce, steak/Worcestershire sauce, and meat sauce/marinade/glaze.

To illustrate historical trends, total retail sales and the various segments are supplied for 2011-2016.

The scope of this report encompasses sauces and condiments sold in multi-serving containers for personal consumption; bulk products are excluded. Sales by non-store retailers such as e-commerce and mail-order direct sellers are included.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year. A full outline of report items by page is available in the Table of Contents.

## Sources

*Condiments & Sauces: United States* (FF10050) is based on *Condiments & Sauces: US Retail Market Trends & Opportunities*, a comprehensive industry report published by Packaged Facts. Sources of market and consumer data consulted for this report include:

- Information Resources (IRI) sales tracking through selected US retail outlets
- government agencies
- sauce and condiment producers and representative trade associations
- a wide range of pertinent industry sources, including business newspapers and magazines, company websites, consumer blogs, press releases, and trade publications.

Consumer data in this report come from two primary sources. The first source is the Packaged Facts National Online Consumer Survey, which includes a panel of 2,000 US adults (age 18 and older) that is balanced to the national population on primary demographic measures such as age cohort, gender, geographic region, marital status, race/ethnicity, presence or absence of children in the household, and household income. Another source of consumer data in this report is the Simmons National Consumer Study from Experian Marketing Services. On an ongoing basis, Experian Marketing Services conducts booklet-based surveys of large and randomly selected samples of consumers (approximately 25,000 for each 12-month survey compilation), which, as an aggregate, are intended to represent a statistically accurate cross-section of the US population as a whole. Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 7 | Industry Codes Related to Condiments & Sauces

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
311421	Fruit and Vegetable Canning	2033	Canned Fruits, Vegetables, Preserves, Jams, and Jellies
311911	Roasted Nuts and Peanut Butter Mfg	2035	Pickled Fruits and Vegetables, Vegetable Sauces and Seasonings, and Salad Dressings
311941	Mayonnaise, Dressing, and Other Prepared Sauce Mfg	2099	Food Preparations, NEC

Source: US Census Bureau

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## Resources

### Packaged Facts

*Condiments & Sauces: US Retail Market Trends & Opportunities*, June 2017

### The Freedonia Group

#### Freedonia Industry Studies

*Converted Flexible Packaging Market in the US*, May 2017

*Food & Beverage Hydrocolloids Market in the US*, May 2017

*Poultry Packaging Market in the US*, March 2017

*Alternative Sweeteners Market in the US*, February 2017

*Meat Packaging Market in the US*, February 2017

*Global Labels Market*, January 2017

*Natural Flavors & Fragrances*, October 2016

*Retail Ready Packaging*, July 2016

*World Flavors & Fragrances*, March 2016

*Food Containers: Rigid & Flexible*, February 2016

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*Grain-Based Foods: United States*

*Healthy-Ingredient Snacks: United States*

*Hispanic Foods & Beverages: United States*

*Meat & Poultry Retail: United States*

*Natural & Organic Foods & Beverages: United States*

*Processed Food: United States*

*Restaurants & Foodservice: United States*

*Salty Snacks: United States*

*Snack Foods: United States*

#### Freedonia Custom Research

### Trade Publications

*Food Business News*

*Food Business Review*

*Grocery Headquarters*

*Prepared Foods*

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*Refrigerated & Frozen Foods*  
*Supermarket News*

### **Agencies & Associations**

American Peanut Council  
The Association for Dressings & Sauces  
Grocery Manufacturers Association  
Information Resources  
Private Label Manufacturers Association  
Simmons National Consumer Survey  
Specialty Food Association  
United States Census Bureau  
United States Department of Agriculture  
United States International Trade Commission