

# SS Condiments, Dressing & Marinade

CATEGORY & SUB-CATEGORY REVIEW

JUNE 2025



**MAINE CENTER**  
**FOR ENTREPRENEURS**

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# Project Overview

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## Report Purpose

This report was created to assist businesses selling in the Condiment, Dressing & Marinades category better understand the markets for their products, and target new markets in the United States. Data presented in this report is intended to provide greater detail on consumer purchasing trends for products in this category.

## Included in this report:

This report provides market dynamics for each product subcategory within the shelf-stable(SS)Condiment, Dressing & Marinade category, delivering detailed insights into sales performance across diverse channels and US Census territories. Within this expanding category, the report covers four primary subcategories: BBQ Sauce, Dressing, Hot Sauce and Mustard.

Despite most sales being attributed to the Multi-Outlet (MULO) channel, this report also includes a breakdown of sales in the Natural Channel to address the prominence of emerging Maine Food & Beverage producers active in Natural and Specialty markets. Additionally, the report highlights the performance of leading brands within the Northeast Census region, a typical entry point for Maine producers.

## Data

All data in this report is derived from the **SPINS Satori Database** and refers to the latest 52 weeks, ending April 20, 2025, unless otherwise noted.

## Project Team and Project Funding

This report was completed by the Maine Center for Entrepreneurs, in partnership with Camoin Associates. Work was completed as a part of the larger body of work under the Domestic Trade Pilot Program, commissioned by the Maine Office of Business Development and funded in part by the Maine Jobs and Recovery Plan.



# How to Use This Report

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## Size of Market

These details and subcategory performance information are valuable for a sales or pitch deck. Generally, businesses and investors find it helpful to understand the overall size of the category and subcategories to **measure the health of a particular category and the scope of opportunities within it.**

Details about market sizing can be found in Section III.

## Growth of Market

Each section of this report shows how the category or subcategory is growing in the Multi-Outlet Channel and Natural Channel, and which geographic areas are growing faster than others. This information helps companies think strategically about **which retail channels offer the best opportunities** for growth in the category and subcategories and **which regions represent the best prospects.**

## Top 10 Brands in the Northeast Region

Most Maine companies start their retail development locally and then build out regionally and nationally. Companies can leverage this information to **identify the top-performing brands, how they are performing in sales dollars and units sold, and how your brand is performing against them.**

## Average All Commodity Volume (ACV)

This represents a weighted measure of product availability or distribution based on total store sales. High values indicate the brand is performing well, while low values indicate an opportunity for brand distribution growth or a more optimized market share. **This can help a company understand which brands are performing well or lack distribution.**

## Average Retail Price in the Top 10 Brands

helps companies understand retail pricing trends. Note that most retail brands showed pricing growth due to inflation. This information **can be used in sales reports as a comparative analysis against performance in the subcategory.** This data reflects the point of sale and scanned price for the brand's products, including discounts at the register. It does not provide pricing for individual SKUs, which should be reviewed when making pricing and pack size decisions.

## Other Uses

This data can direct a company's business development efforts. Suppose a certain channel and location have experienced strong growth. In that case, identifying best-fit retailers in those locations and connecting with relevant distributors and brokers can be worthwhile. **Again, indicating the growth of a channel or geography can be a useful reference point to include in a sales or pitch deck.**

# Executive Summary

## Condiments, Dressing & Marinades is valued at \$15.5 billion in retail sales in the United States

The overall product category grew 2.0%, annually in 2025, and grew in all US Census regions. The South led in sales volume, at \$6.4 billion, and demonstrated a solid growth rate at +2.4%.

**The review guideline for this project is to provide focus on 4 of the 12 Shelf Stable(SS) subcategories: BBQ Sauce, Dressing, Hot Sauce and Mustard.** The collective 4 subcategories are responsible for 34% of overall category \$ volume annually, at \$5.3B, for this data reporting period.

Of the 4 subcategories reviewed, the Dressing subcategory, registering 51% of total subcategory \$ volume, at \$2.7B, is experiencing a minor decline to the previous reporting period, -0.9%. BBQ Sauce, the 2<sup>nd</sup> largest of the 4 categories, experienced a significant sales increase, accounting for \$1.0B in \$ volume, and \$ growth of +5.3% over prior year. Hot Sauce, the 3<sup>rd</sup> largest category, responsible for \$876.5M in sales, grew the fastest at +5.5%. Mustard, the smallest subcategory, with \$588.5M in sales, experienced the largest decline of the 4 subcategories at -1.2%.

It is important to consider that the food inflationary trends of 2025 continue to be a contributing factor to the reported sales growth, potentially affecting the true scale of market expansion.



## SPINS Satori Data

52 Weeks Ending April 20, 2025

### SS Condiments, Dressing & Marinades

- **Sub-Categories:** BBQ Sauce, Dressing, Hot Sauce, Mustard

### Channels:

**MULO** “Multi Unit Location Outlet” - includes Food/Grocery, Drug, Mass Merchandisers, Walmart, Club Stores (BJs and Sam’s), Dollar Stores (Dollar General, Family Dollar, Fred’s Dollar), Military DECA (commissaries).

**Natural** - includes full-format stores with \$2 million+ in annual sales and 40% or more of UPC-coded sales from natural/organic/specialty products. Includes co-ops, associations, independents and large regional chains (excludes Whole Foods & Trader Joes).



### SPINS Syndicated Retail Data

The data included in this report is from **SPINS Satori Database** and includes Retail Scan Data for the Natural sales channel and Multi Unit Location Outlets (MULO). SPINS is focused mainly on the health and wellness ecosystem and addresses the growing niche landscapes of natural, specialty, alternative, and gourmet product retailers. SPINS partners with IRI to provide MULO data.

### US Census Regions





# SPINS<sup>®</sup>

## Additional Terms & Definitions

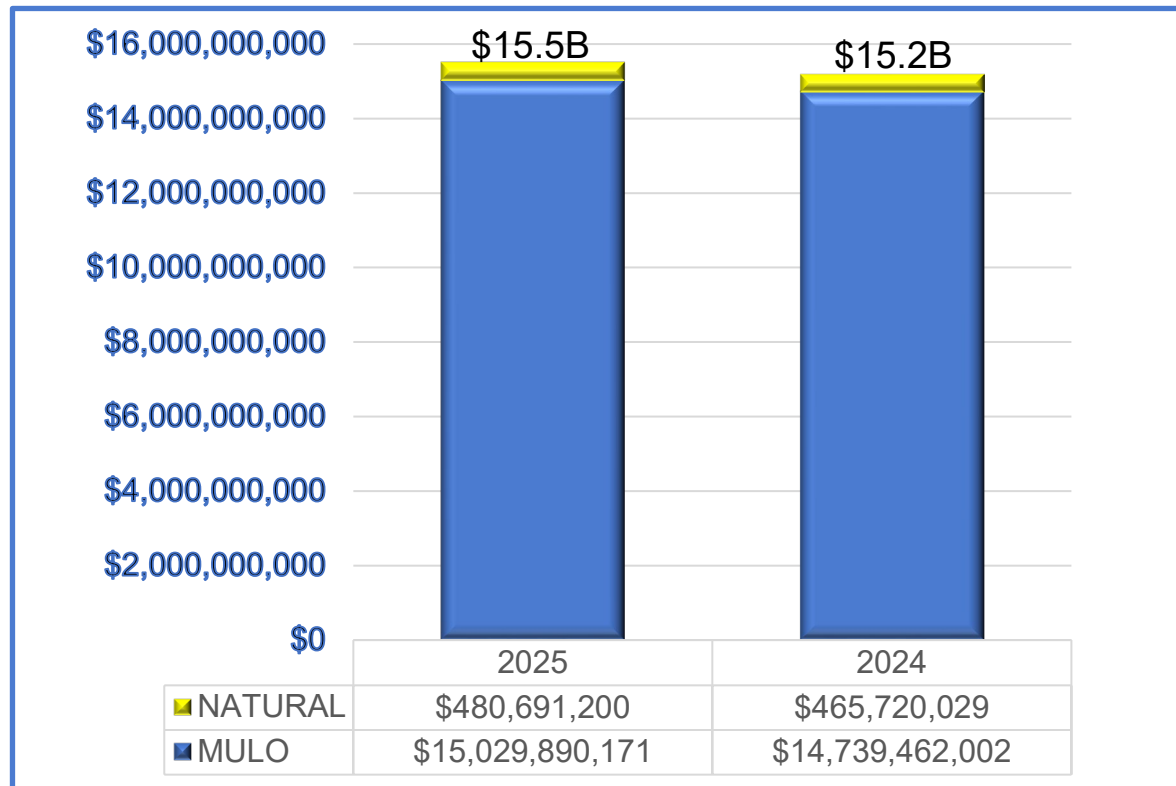
Term	Definition
Dollars	Total dollar sales of a product or group of products in the time frame indicated.
Dollars, Yago	Dollars sold over the same time period a year ago.
Dollars +/- Chg, Yago	The positive or negative dollar change for products sold in year reported, versus previous year.
Dollars % Chg, Yago	The positive or negative percent change of dollars sold in year reported, versus the previous year.
Units	Total unit sales of a product or group of products.
Units, Yago	Units sold over the same time period a year ago.
Units +/- Chg, Yago	The positive or negative units change for units sold in year reported, versus previous year.
Units % Chg, Yago	The positive or negative percent change of units sold in year reported, versus previous year.
AVG ACV	This Average All Commodity Volume measure is an average of a product's distribution weighted by the store size (ACV) across all weeks in a time period in which the product was distributed.
Average Items Selling	This is the number of items, on average, that a retailer carries of a category, segment or brand. e.g. if a brand is made of 7 different items (skus), the average store that carries the brand at all may have 4.
ARP	The Average Retail Price reports the average product unit price.
ARP, Yago	Average Retail Price over the same time period a year ago.
ARP +/- Chg, Yago	The positive or negative dollar change for average retail pricing in year reported, versus previous year.

# SS CONDIMENTS, DRESSING & MARINADE Category Performance

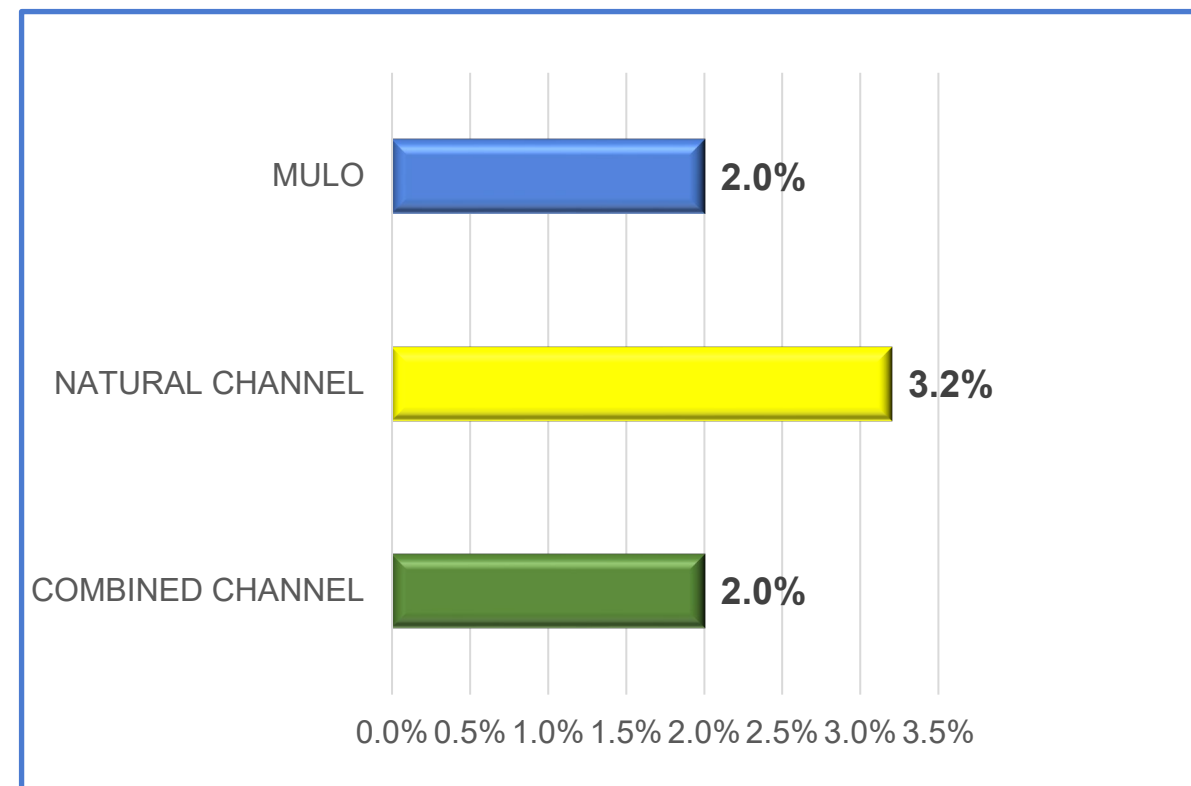
*SPINS Satori - 52 Weeks Ending APRIL 20, 2025*

# Total Category – Condiments, Dressing & Marinade

Total US Dollars



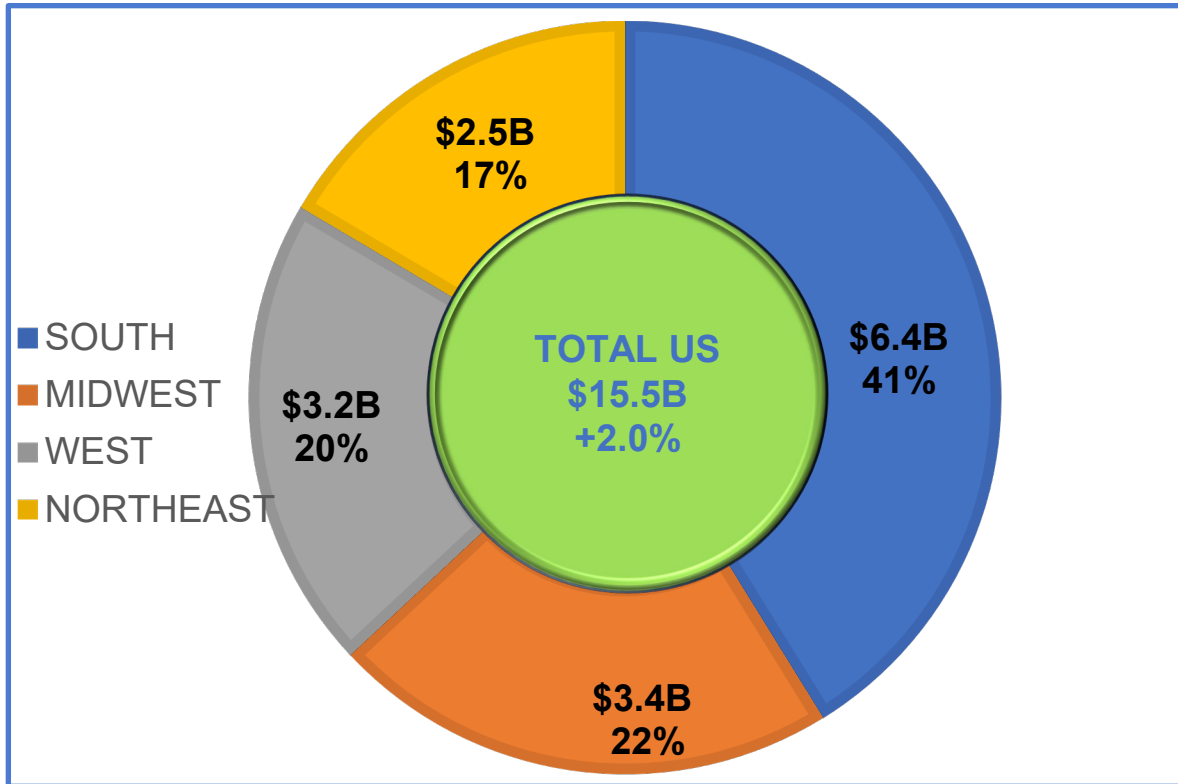
% Dollar Change vs Year Ago



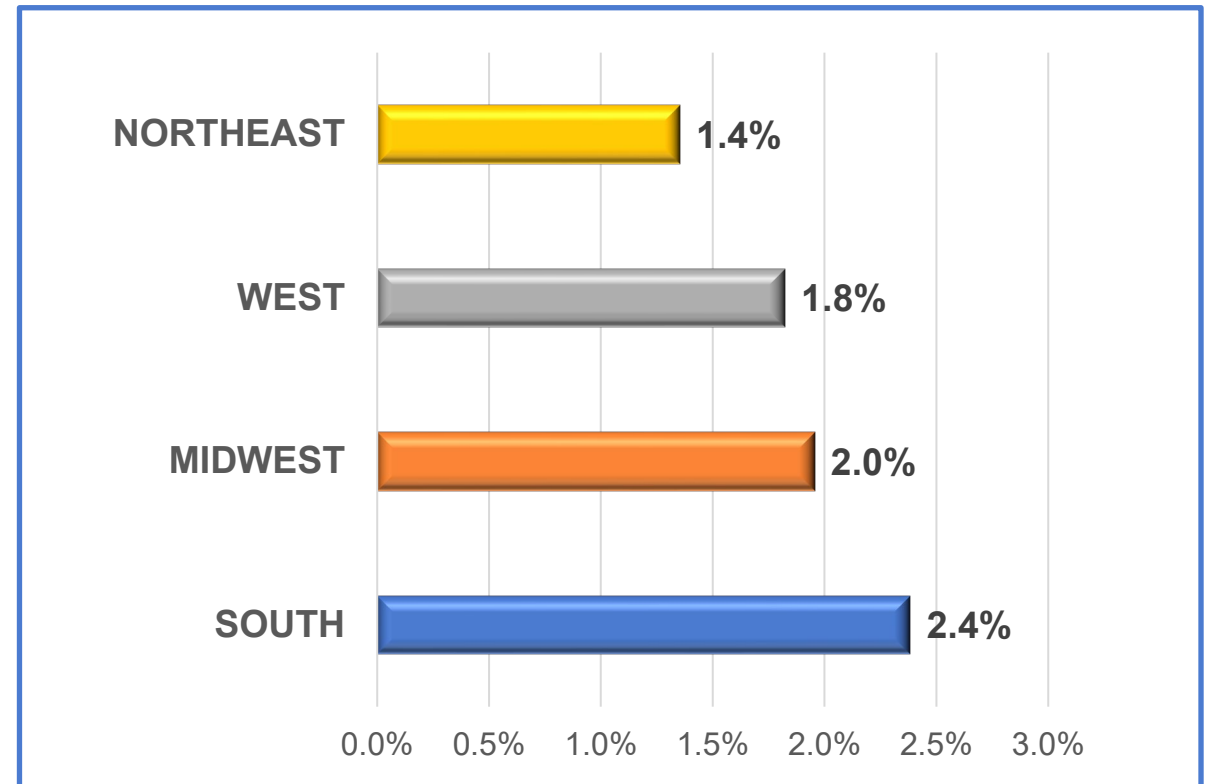
- The Total Condiment combined channel is a \$15.5B category and is performing better than prior year by 2.0%.
- Sales dollars were up in both the Natural Channel +3.2% and MULO +2.0%.
- As in most categories, MULO represents most category sales.

# Total SS Condiments, Dressing & Marinade - By Region

Total Dollars and % Category Share by Region



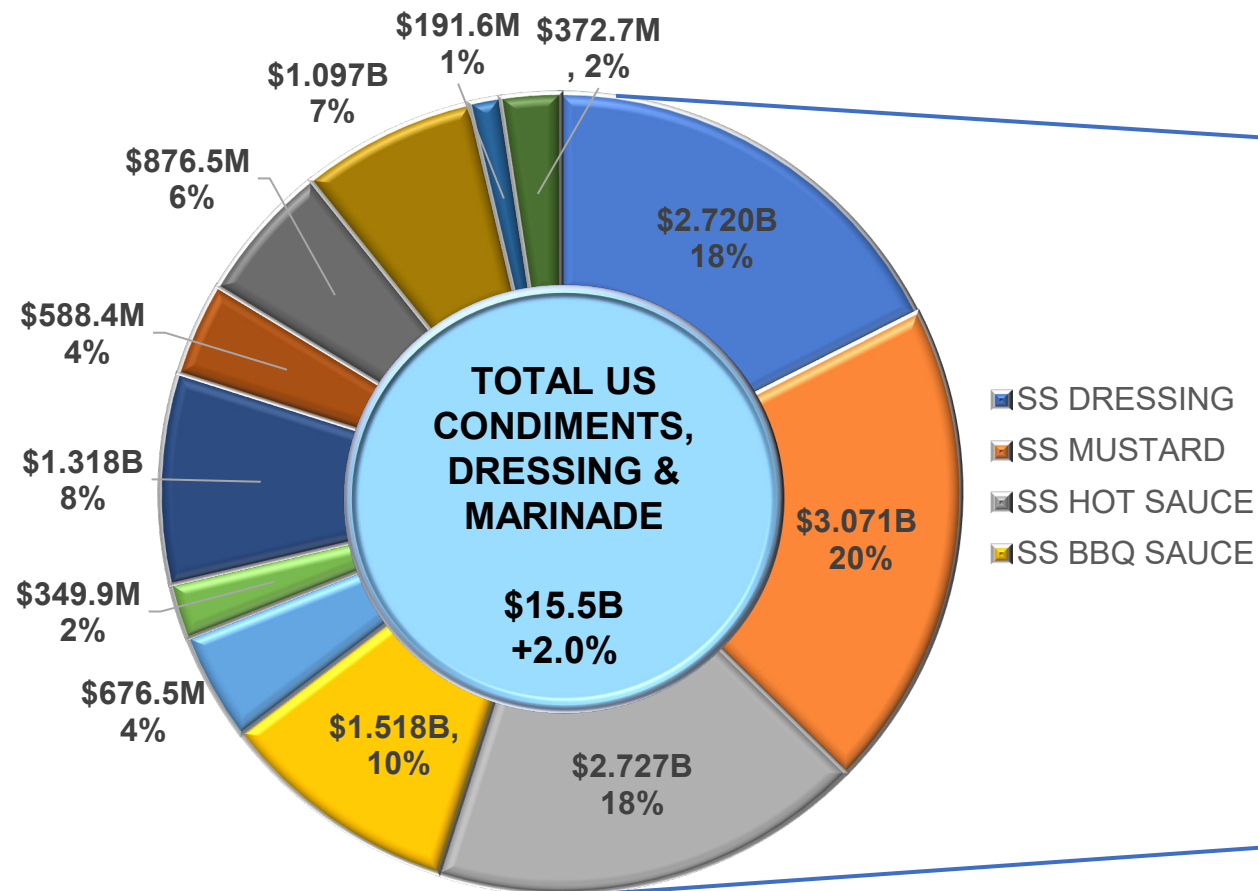
% Dollars Change vs Year Ago



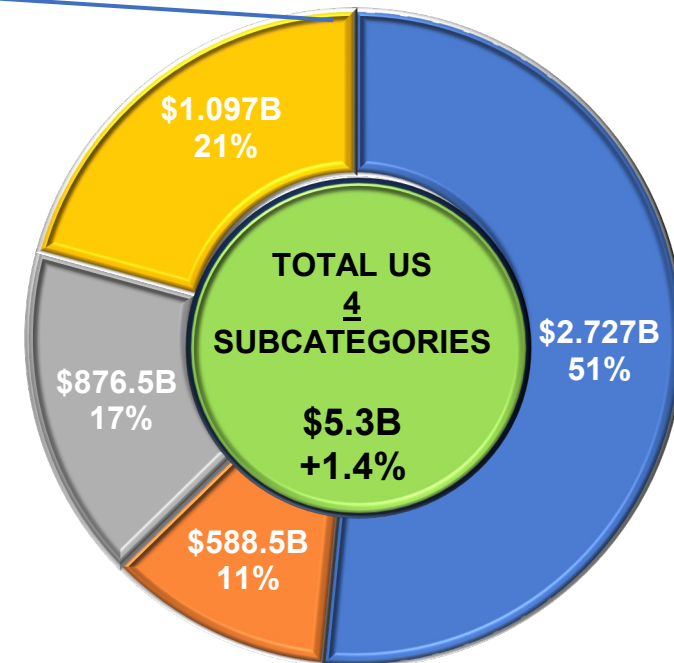
- The South represents 41% of total category sales dollars, followed by the Midwest (22%), the West (20%) and the Northeast (17%).
- All 4 regions experienced dollar growth over the prior year.

# Total SS Condiments, Dressing & Marinade – 4 Sub-Categories for this Review

- SS DIPPING FINISHING & EVERYTHING SAUCES
- SS & RF MAYONNAISE
- SS DRESSING
- SS SALAD TOPPERS & STUFFING MIX
- SS SIMMER & SKILLET SAUCES
- SS SOY SAUCE & TAMARI
- SS KETCHUP
- SS MUSTARD
- SS HOT SAUCE
- SS BBQ SAUCE
- SS CHUTNEYS & SAVORY JELLIES
- SS GRAVY



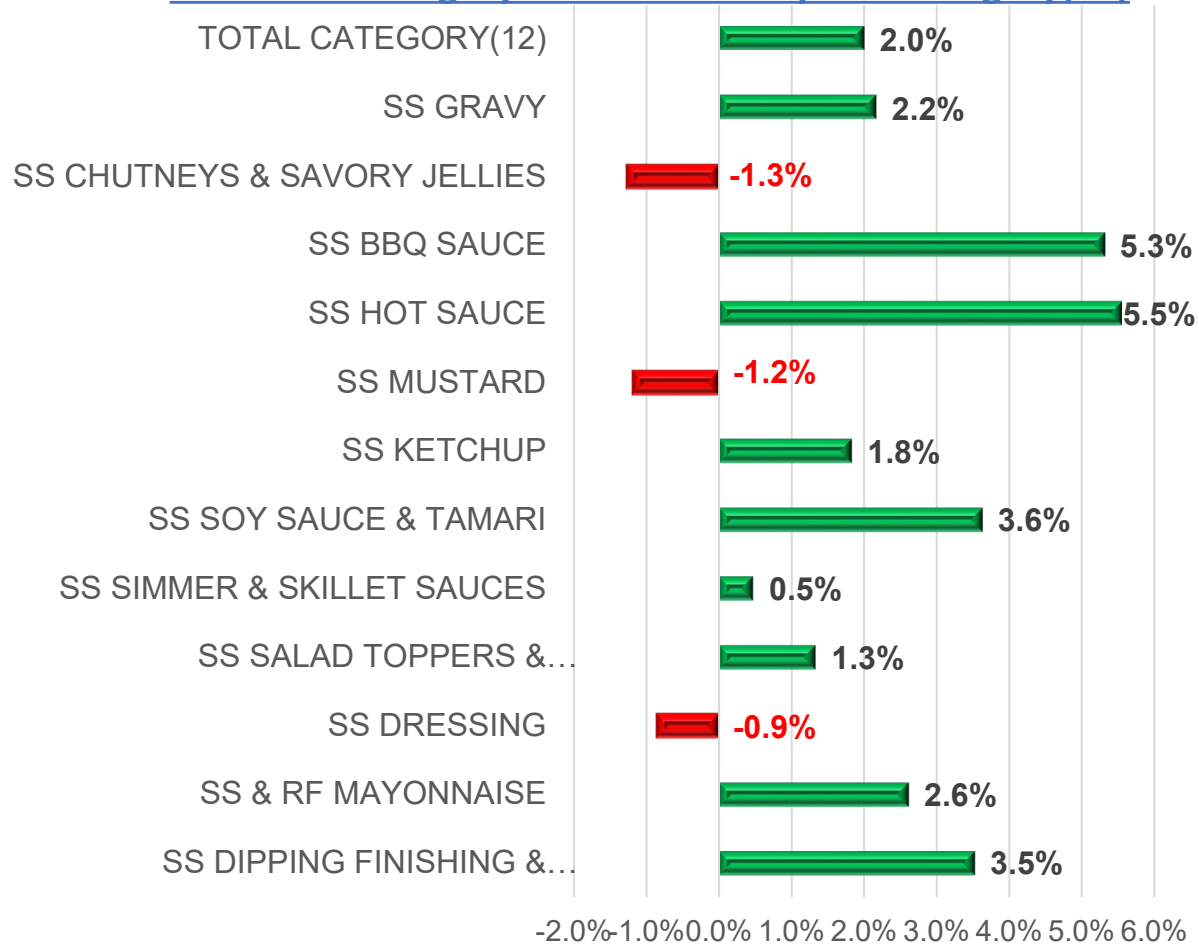
- SS DRESSING
- SS MUSTARD
- SS HOT SAUCE
- SS BBQ SAUCE



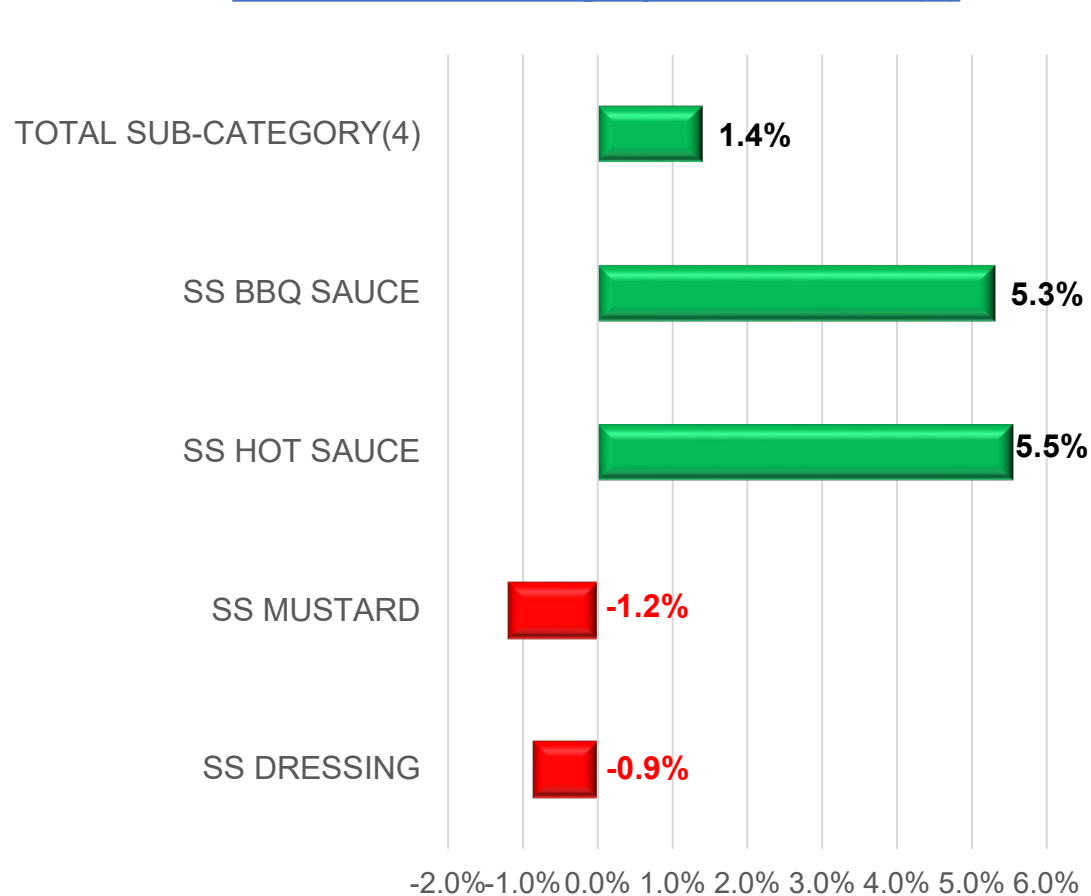
- The Condiments, Dressing & Marinade categories, consisting of 12 sub-categories, including the 4 Sub-categories for this review; **SS Dressing, Mustard, Hot Sauce & BBQ Sauce**, is a very large category, responsible for \$15.5B in annual sales total US and growing 2% year over year.
- The 4 subcategories for this review comprise 34% of Total Category \$ volume, or \$5.3B growing 1.4% year over year.

# Total US Condiments, Dressing & Marinades – Dollar % CHG By Subcategory

**Total US – Category Dollar % CHG by Sub-Category(12)**



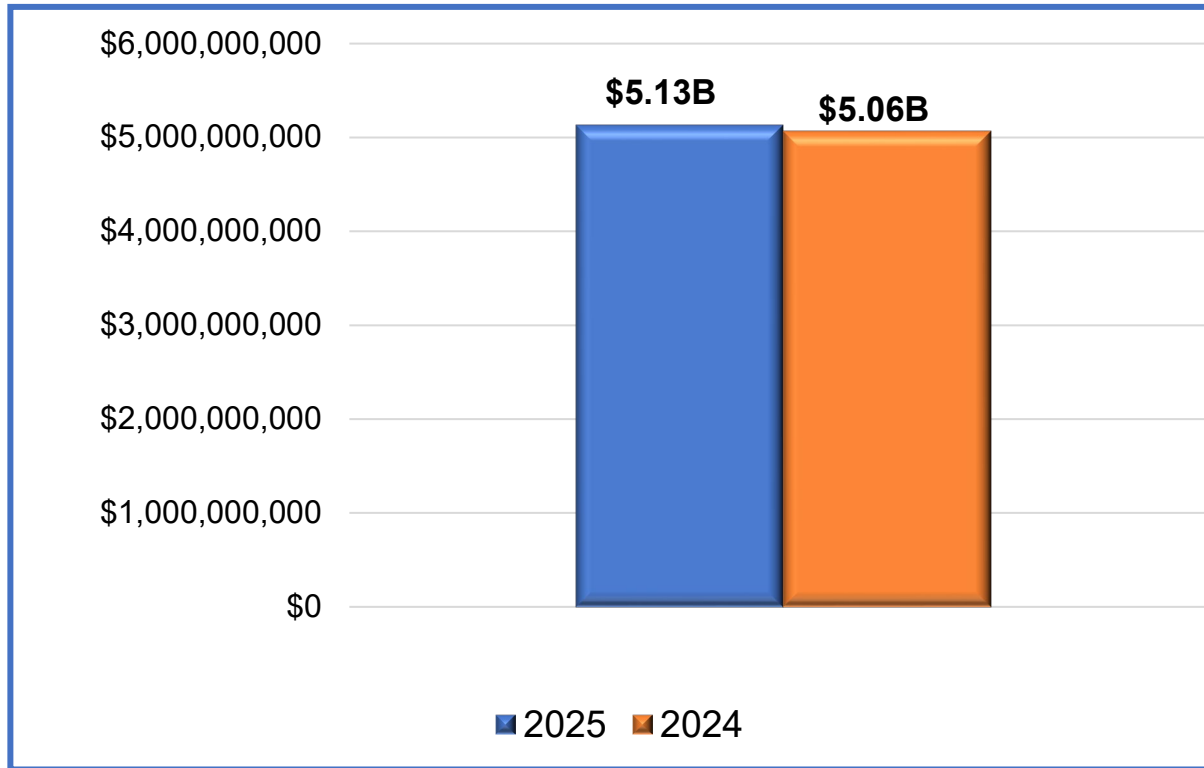
**Total US – Sub-Category Dollar % CHG (4)**



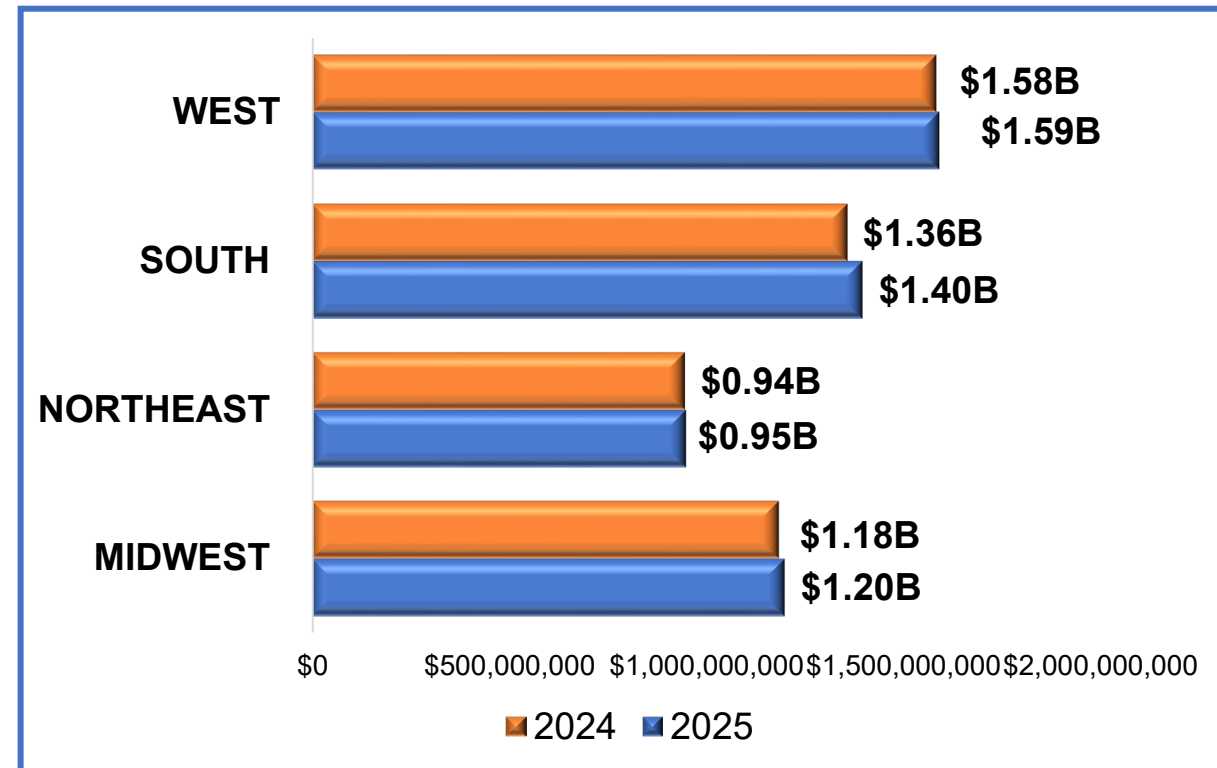
- While the Total Category \$ performance to prior year is positive 2.0%, detractor Sub-Categories, SS Chutneys & Savory Jellies, Mustard & Dressing, are at -1.3%, -1.2% and -0.9%, respectively.
- The 4 Sub-categories for this review are in overall % Dollar growth at +1.4%, with Mustard & Dressing in decline.

# MULO: SS BBQ Sauce, Dressing, Hot Sauce & Mustard – Dollar Volume

MULO Dollars



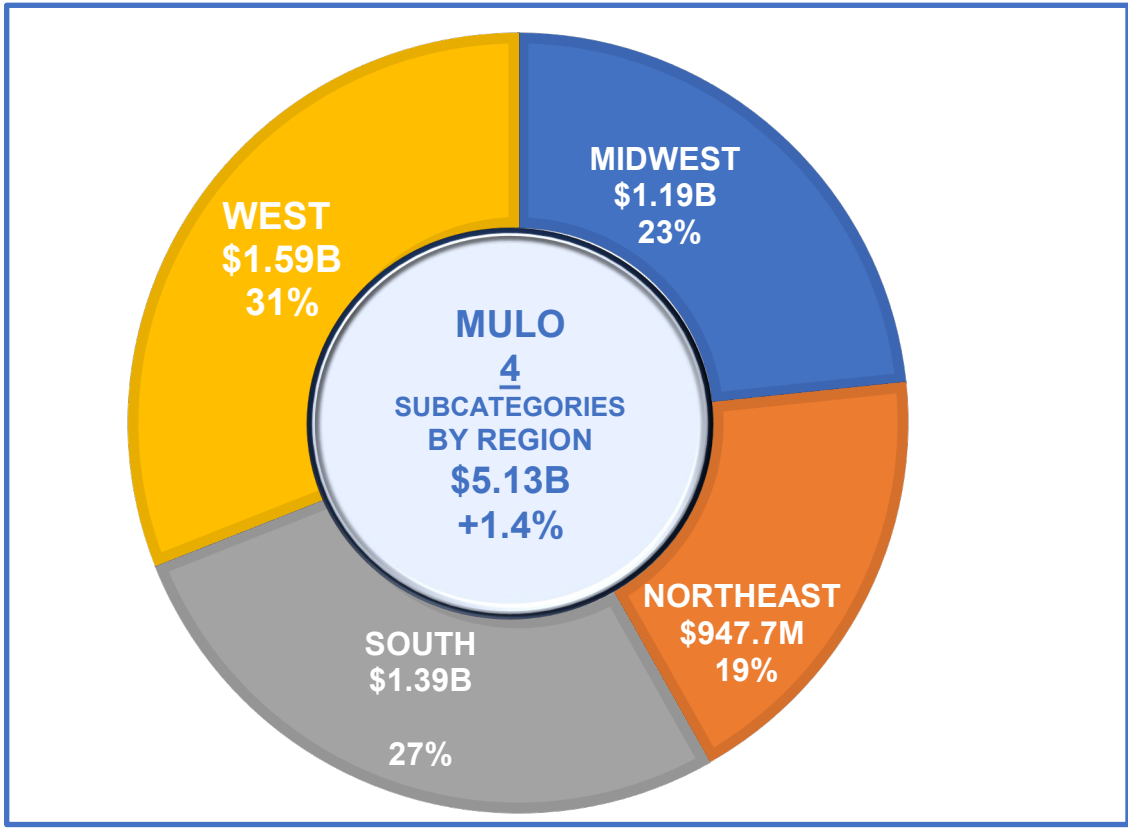
Dollar Change vs Year Ago by Region



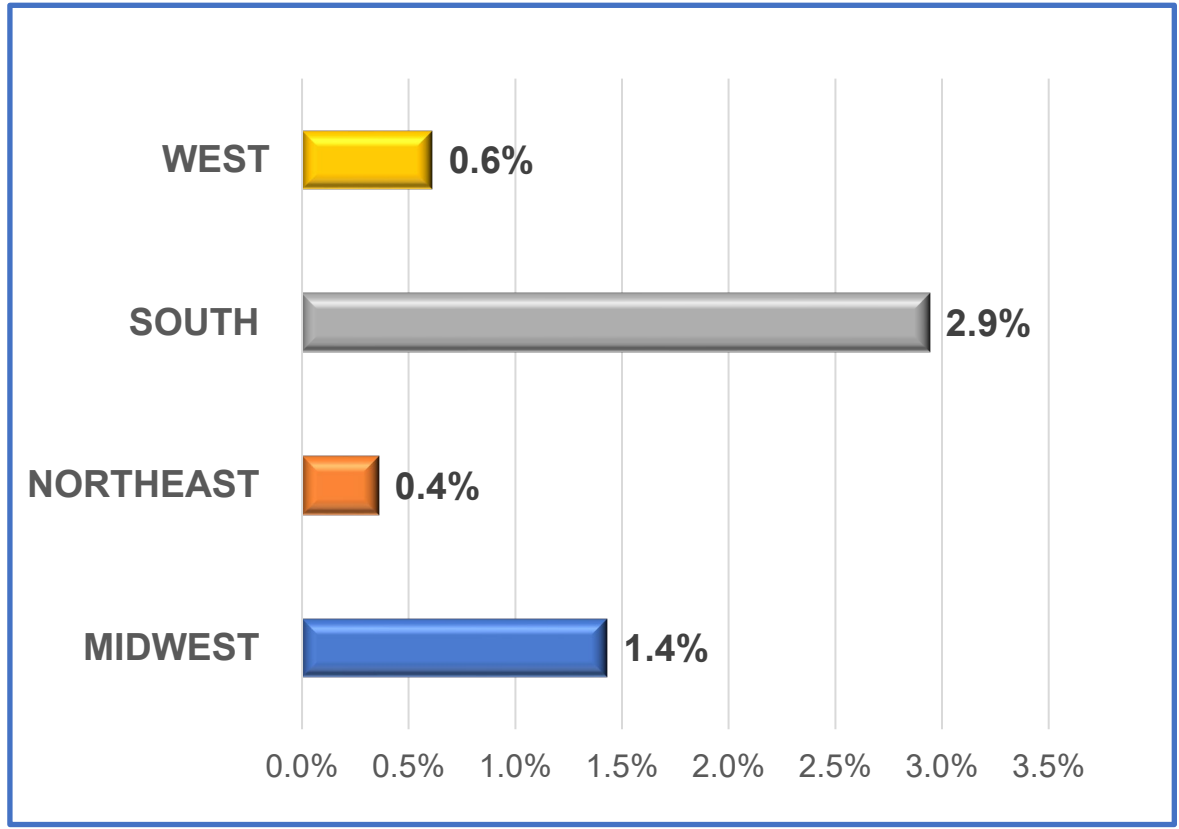
- Total US MULO dollar volume for the category is \$5.13B and is performing better than prior year by 1.4%.
- The West region is the largest \$ volume region, representing 38% of total MULO sales, followed by Midwest, West and Northeast, respectively.
- All 4 regions and Total US are posting sales that are greater than prior year.

# MULO: SS BBQ Sauce, Dressing, Hot Sauce & Mustard – Dollar Volume by Region

Combined – 4 Sub-Category \$ Share by Region



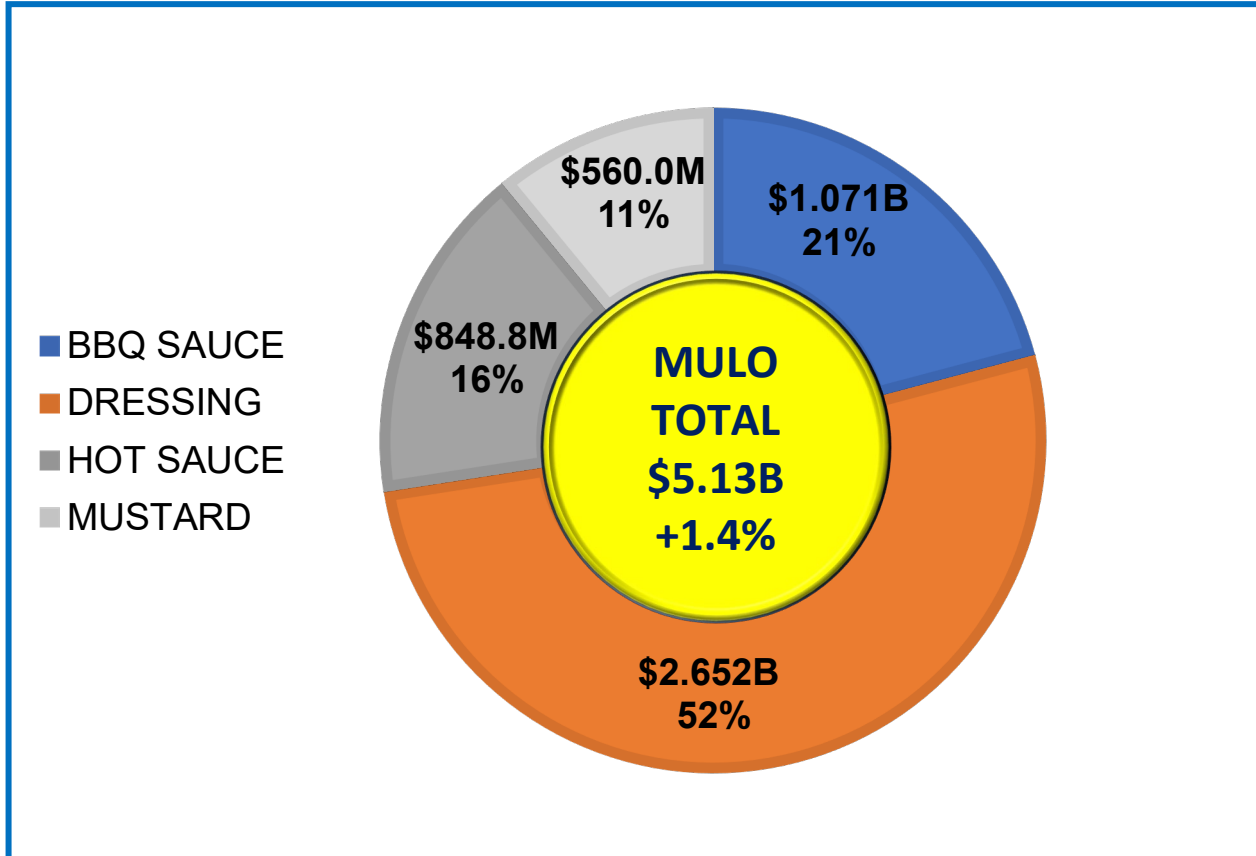
Combined 4 Sub-Category \$ Share % CHG by Region



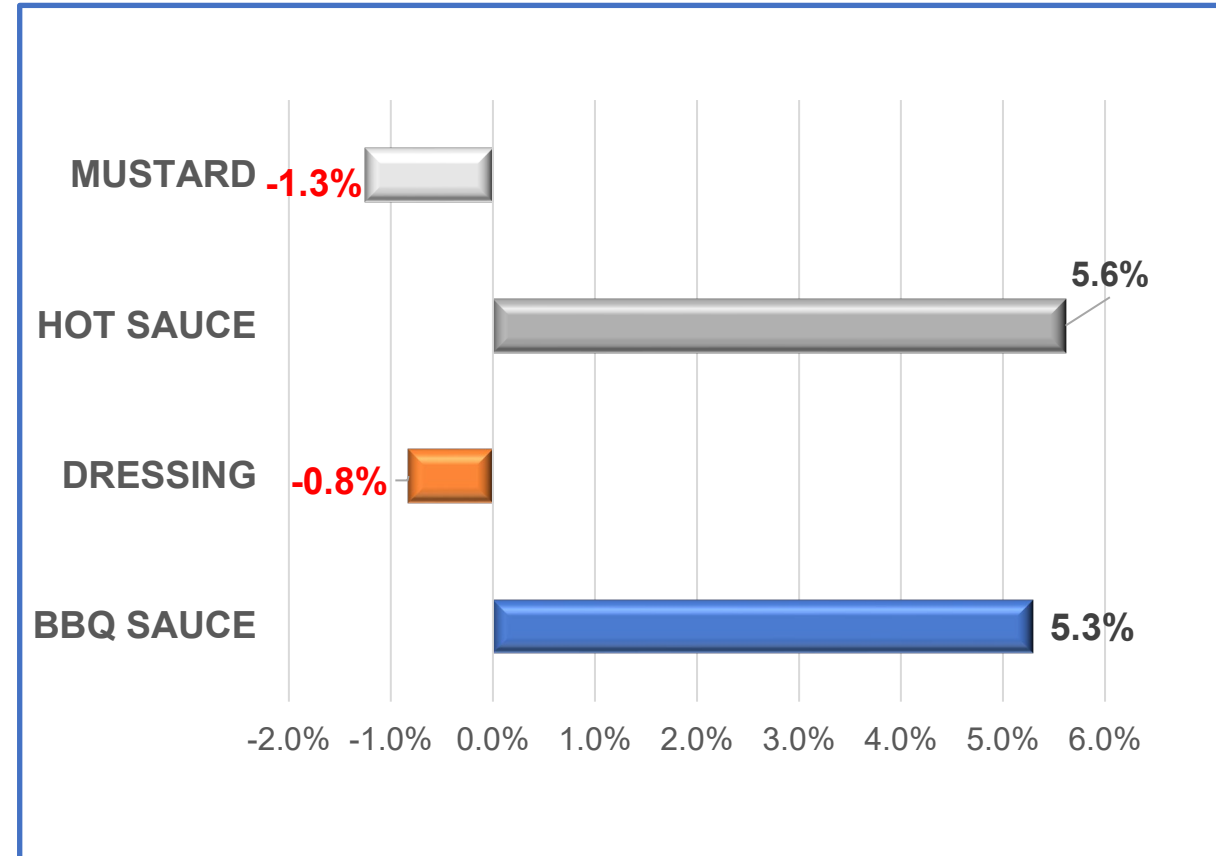
- SS BBQ Sauce, Dressing, Hot Sauce & Mustard, represent \$5.13B in annual \$ volume and is growing 1.4%.
- The West Region, responsible for the largest \$ share, is responsible for 31% of overall combined sub-category share, followed by the South, 27%, Midwest, 23% and Northeast, 19%.
- The South is experiencing the greatest overall combined sub-category % dollar increase at +2.9%, followed by the Midwest, West & Northeast.

# MULO: SS BBQ Sauce, Dressing, Hot Sauce & Mustard - By Subcategory

MULO Subcategory \$ and % Category Share



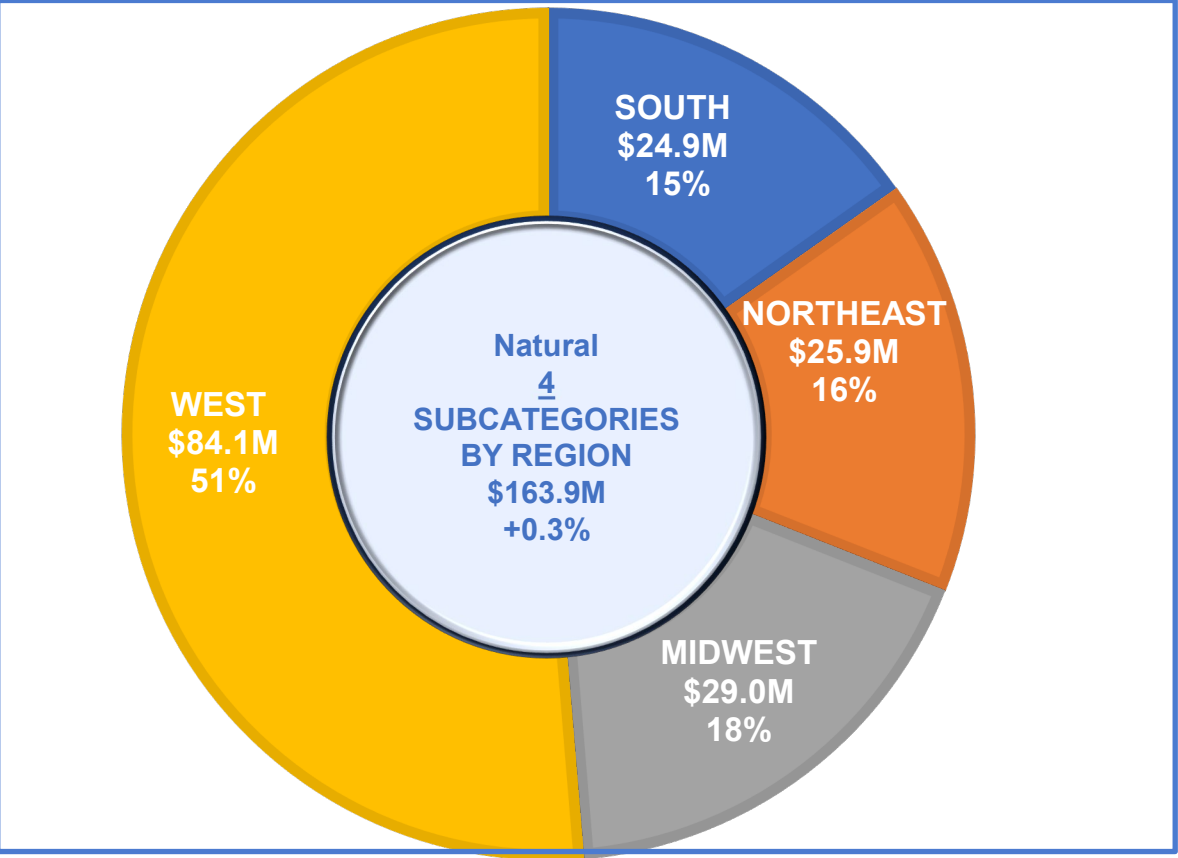
% Dollar Change vs Year Ago



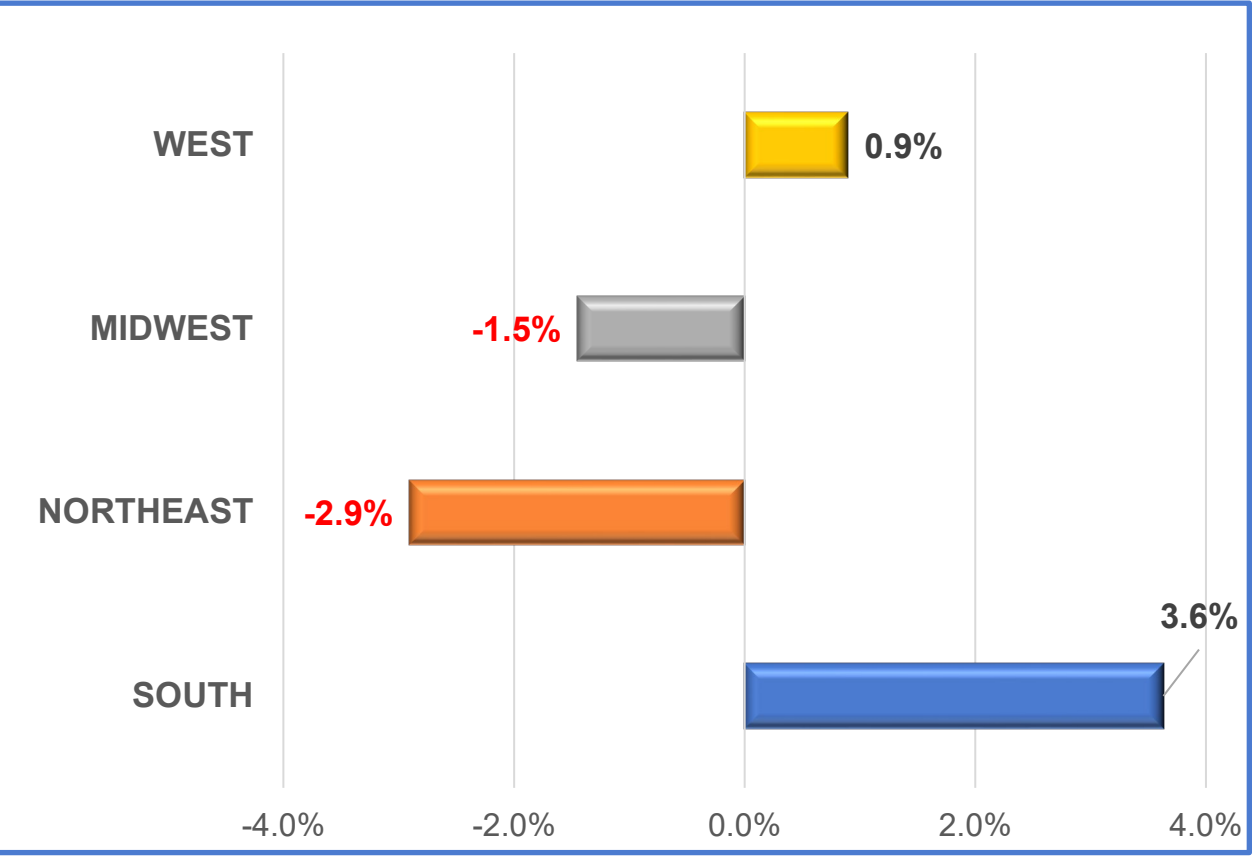
- Dressing is the largest subcategory, representing \$2.65B, or 52% of total MULO \$ volume, with slight dollar decline of -0.8%.
- BBQ Sauce, Hot Sauce and Mustard represent the remainder of category volume; both Hot Sauce and BBQ Sauce are performing positive to prior year, +5.6% and +5.3%, respectively.
- Mustard, the smallest of the 4 sub-categories, is in decline -1.3%.

# NATURAL: SS BBQ Sauce, Dressing, Hot Sauce & Mustard – Dollar Volume by Region

Combined – 4 Sub-Category \$ Share by Region



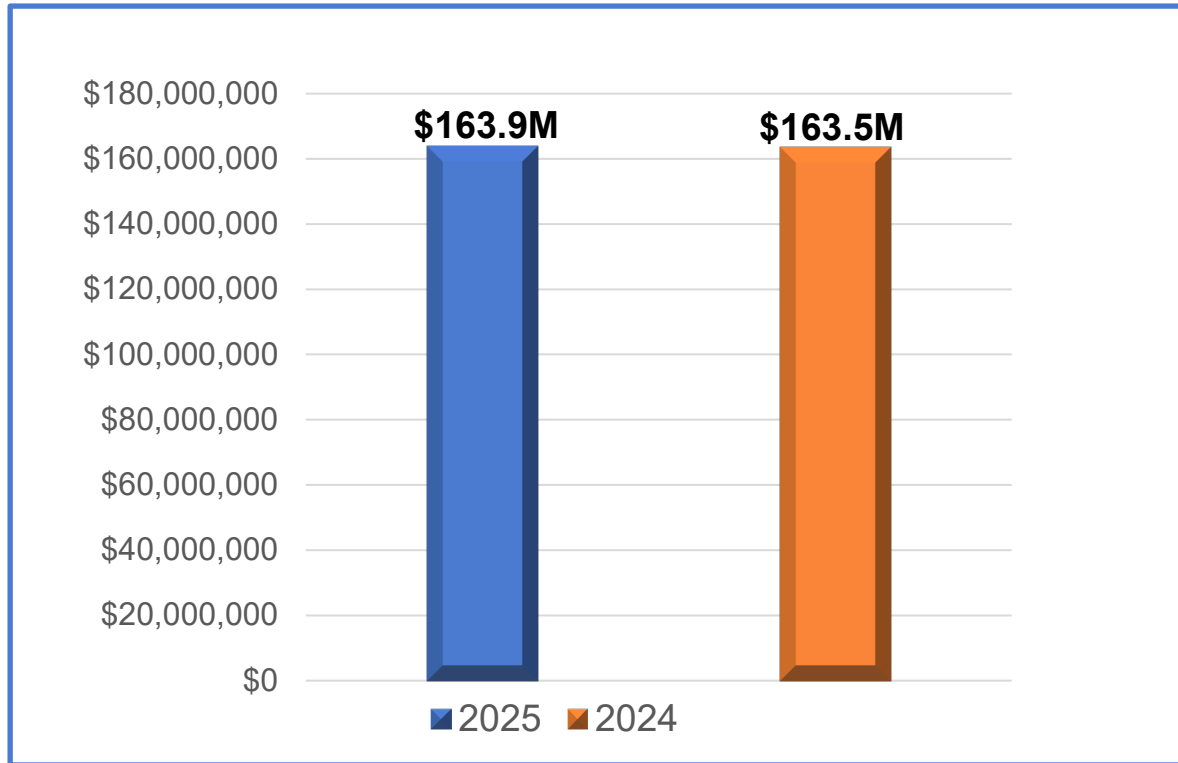
Combined 4 Sub-Category \$ Share % CHG by Region



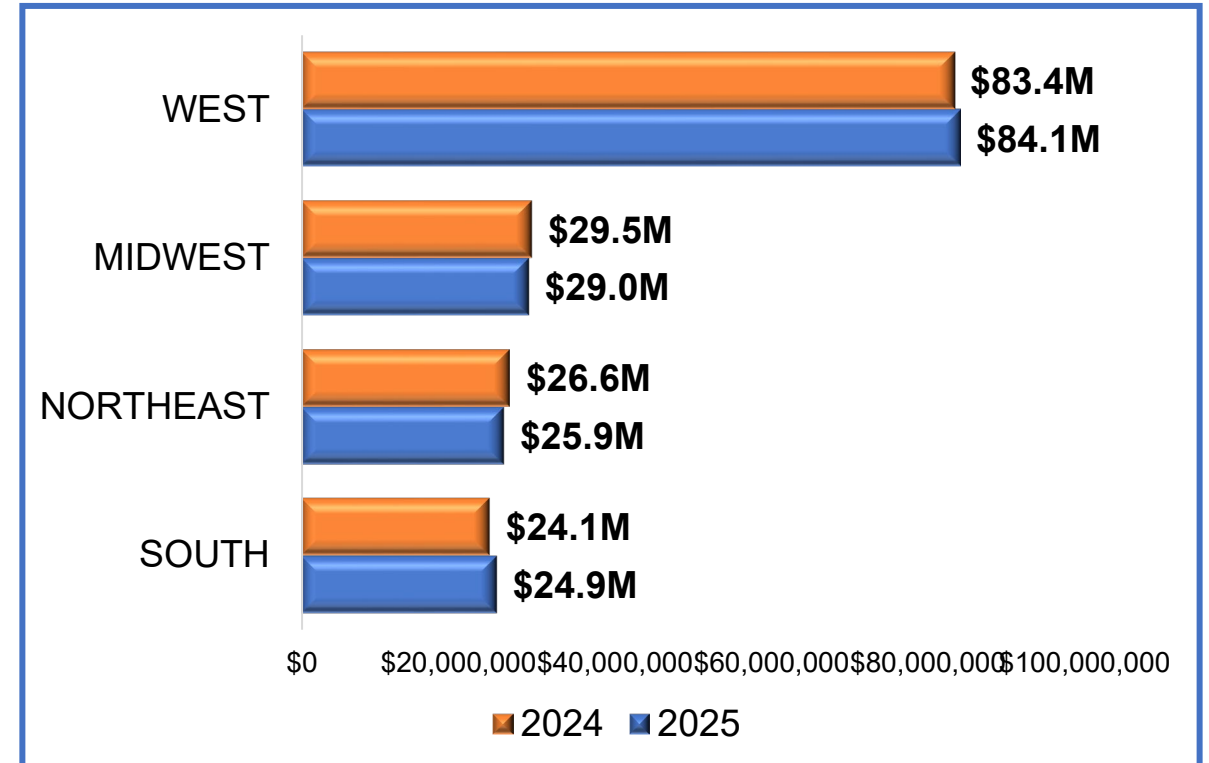
- SS BBQ Sauce, Dressing, Hot Sauce & Mustard, represent \$163.9M in annual \$ volume, and is growing 0.3%.
- The West Region, responsible for the largest \$ share, is responsible for 51% of overall combined sub-category share, followed by the Midwest, 18%, Northeast, 16% and South, 15%.
- The South is experiencing the greatest overall combined sub-category % dollar increase at +3.6%, followed by the West at +0.9%; both Midwest & Northeast are in decline to prior year.

# Natural Channel: BBQ Sauce, Dressing, Hot Sauce & Mustard

Natural Channel Dollars



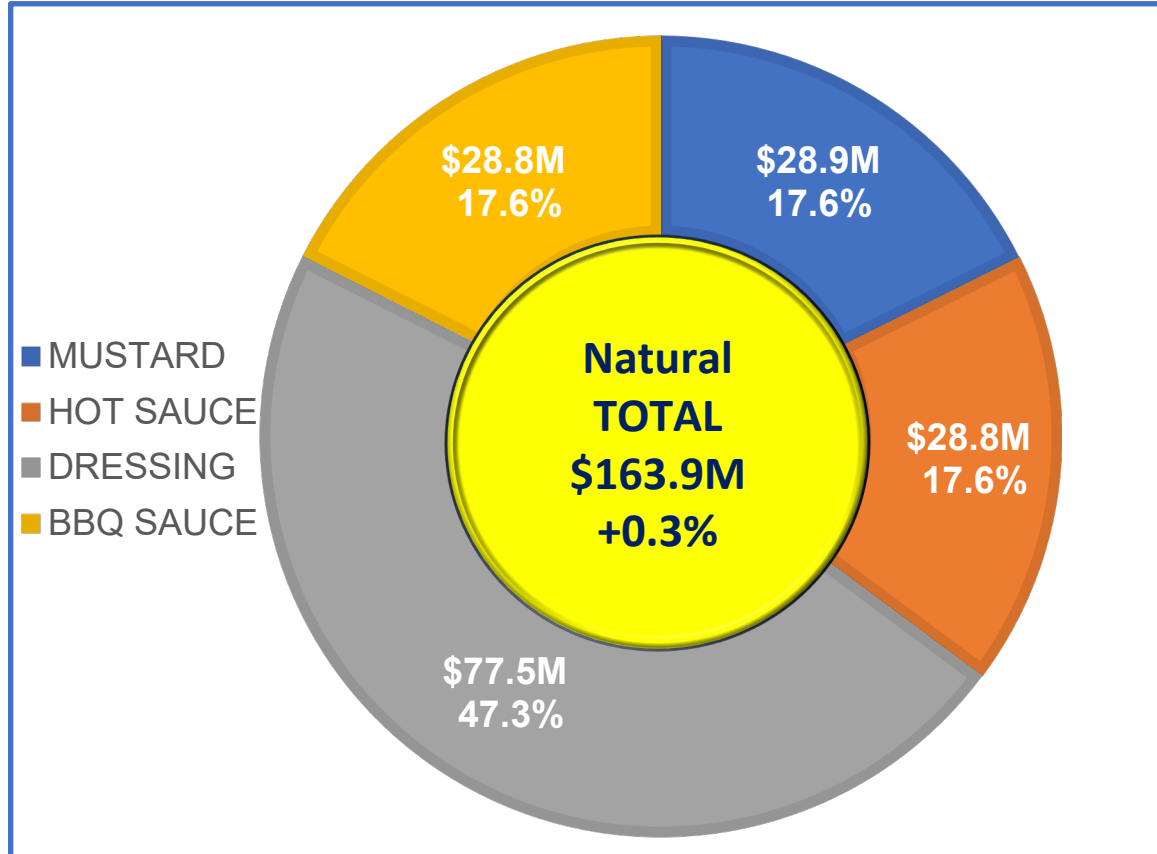
Dollar Change vs Year Ago by Region



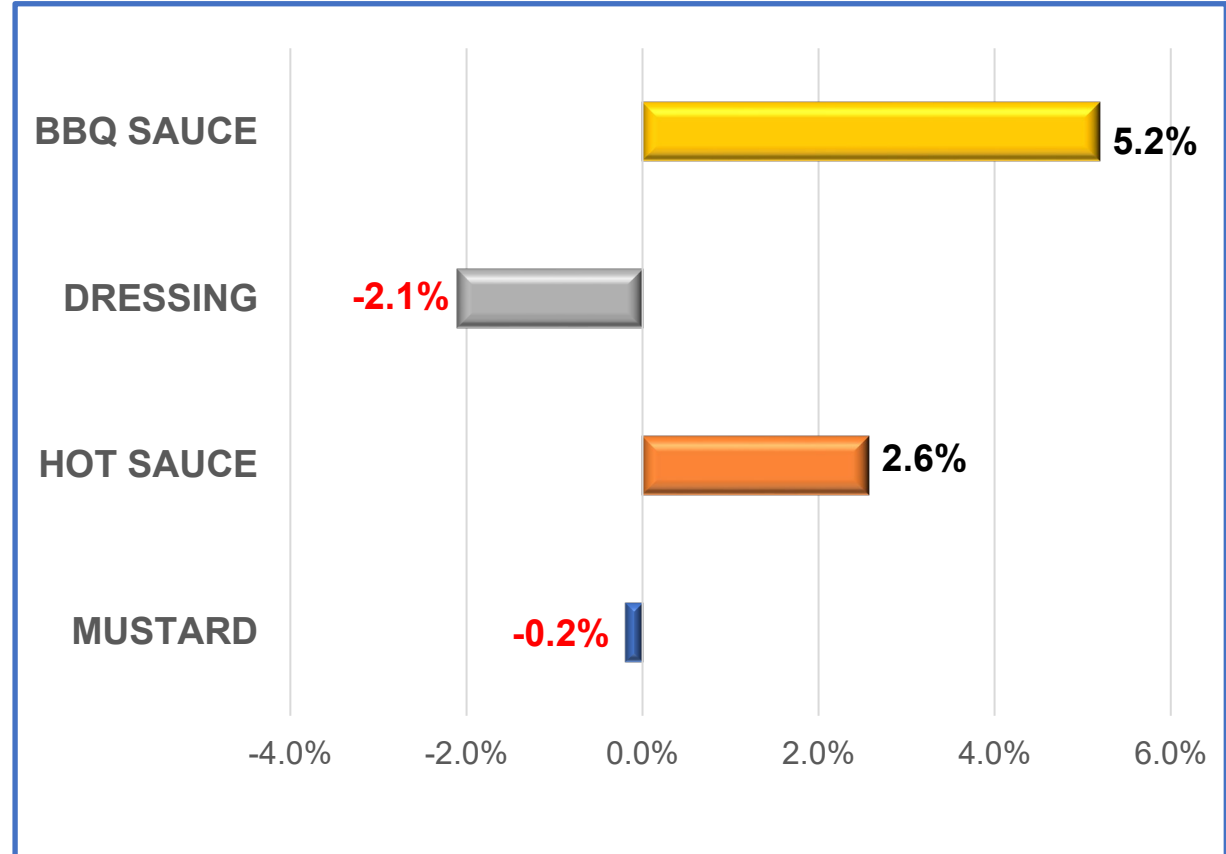
- Natural Channel \$ volume for the category is \$163.9M and has grown 0.3% over prior year.
- The West region is the largest \$ volume region, representing 37% of total Natural Channel category sales, followed by Midwest, Northeast and South regions, respectively.
- The South is experiencing the greatest overall combined sub-category % dollar increase, followed by the West 9%; both Midwest & Northeast are in decline to prior year.

# Natural: BBQ Sauce, Dressing, Hot Sauce & Mustard - By Subcategory

Natural Subcategory \$ and % Category Share



% Dollar Change vs Year Ago



- Dressing is the largest subcategory, representing \$77.5M, or 47% of total MULO \$ volume, with a dollar decline of -2.1% to prior year.
- BBQ Sauce, Hot Sauce and Mustard represent the remainder of category volume; both Hot Sauce and BBQ Sauce are performing positive to prior year, +2.6% and +5.2%, respectively.
- Mustard is in very slight decline, at -0.2%.

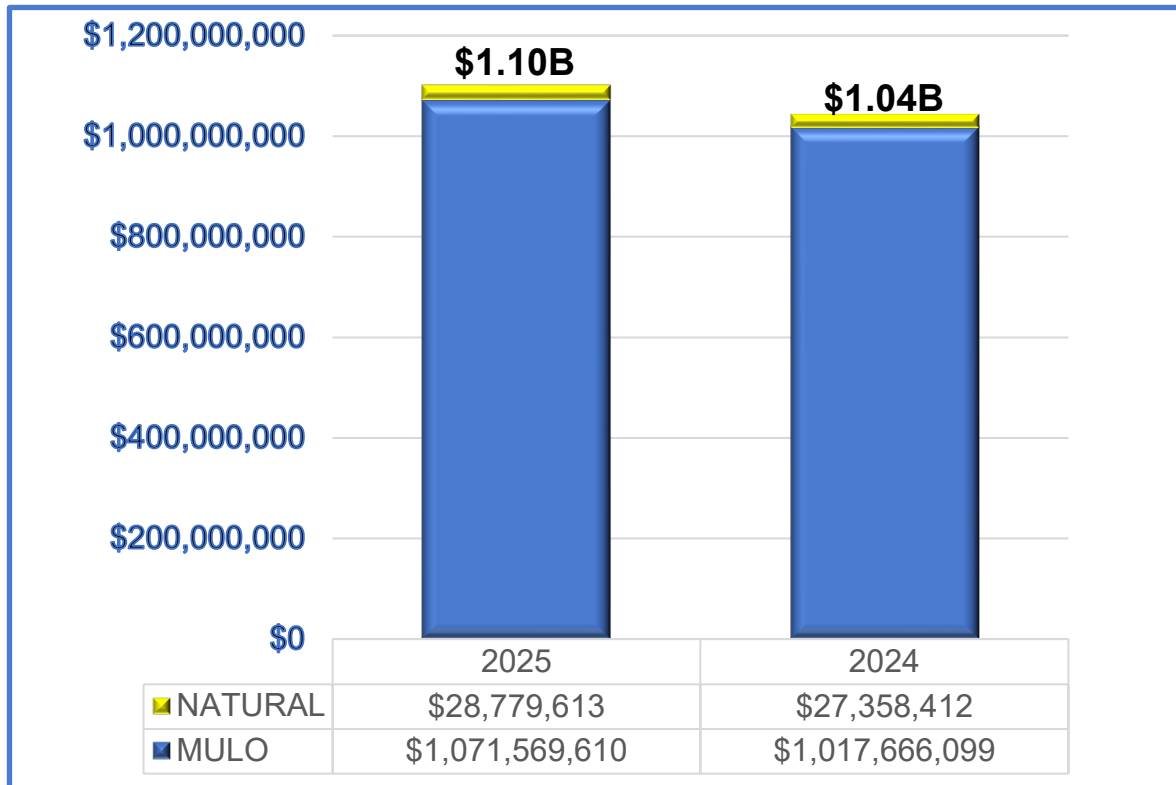
# SS BBQ SAUCE

## Sub-category Performance

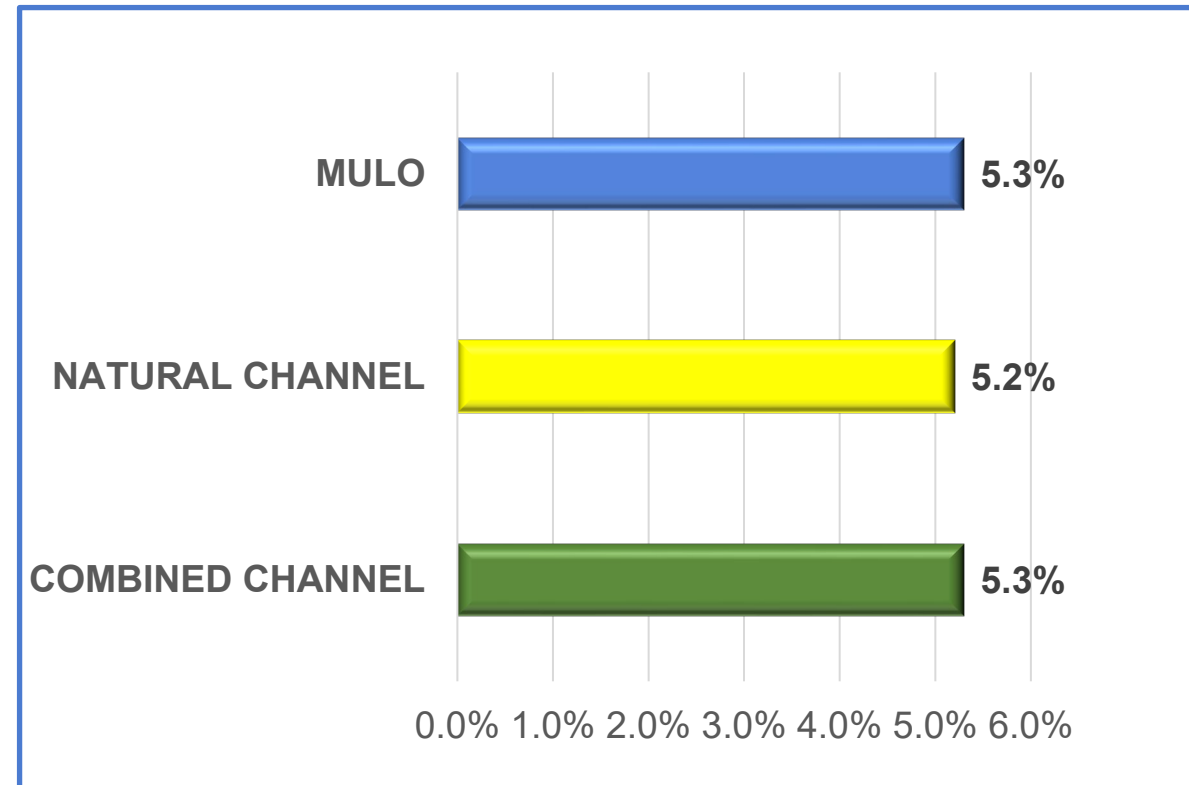
*SPINS Satori - 52 Weeks Ending April 20, 2025*

# Total US SS BBQ Sauce

Total US Dollars



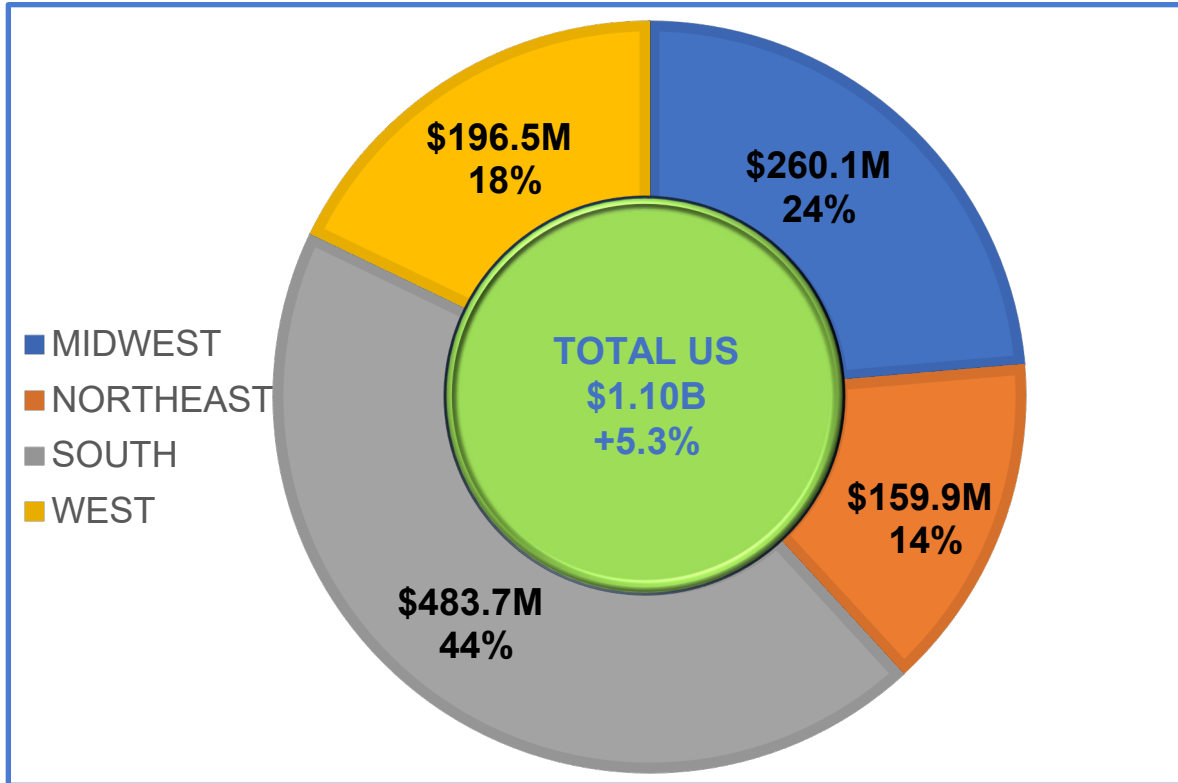
% Dollar Change vs Year Ago



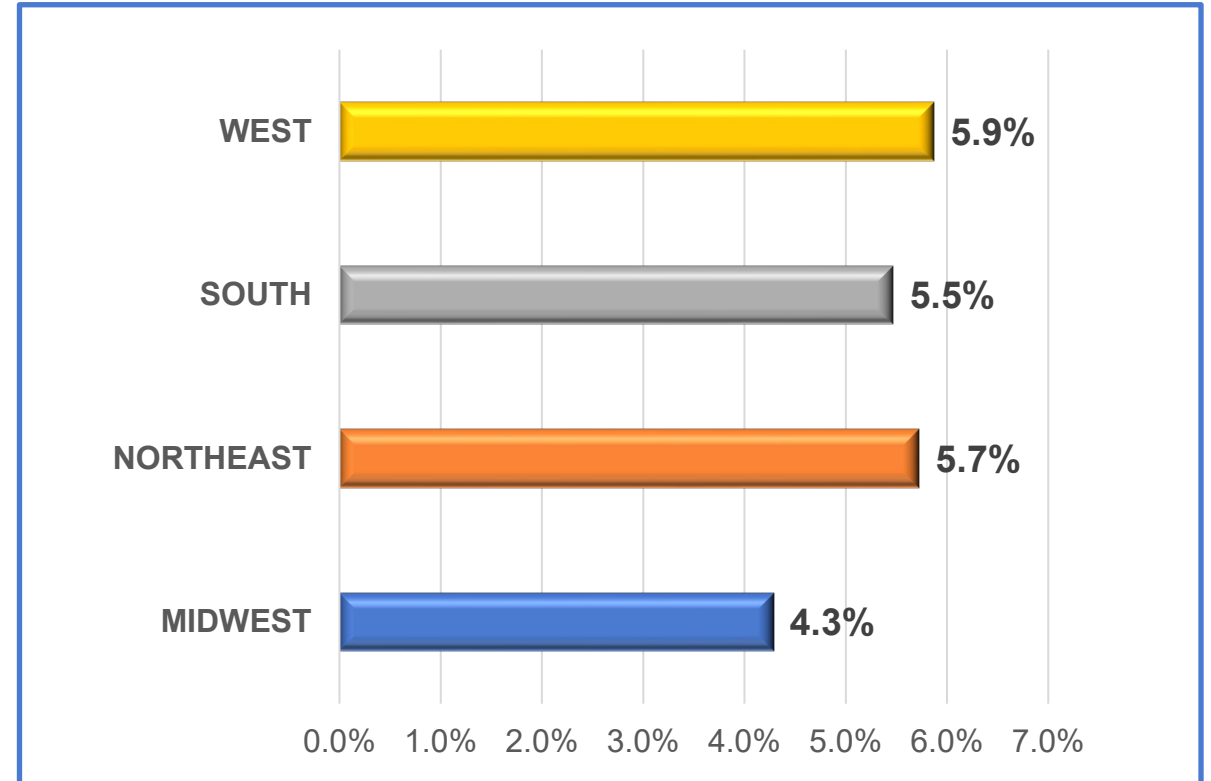
- The Total US SS BBQ Sauce combined channel is a \$1.10B category and is performing better than prior year by 5.3%.
- Sales dollars were up in both the Natural Channel at +5.2% and MULO at +5.3%.
- As in all categories, MULO represents most category sales.

# Total SS BBQ Sauce- By Region

Total Dollars and % Category Share by Region



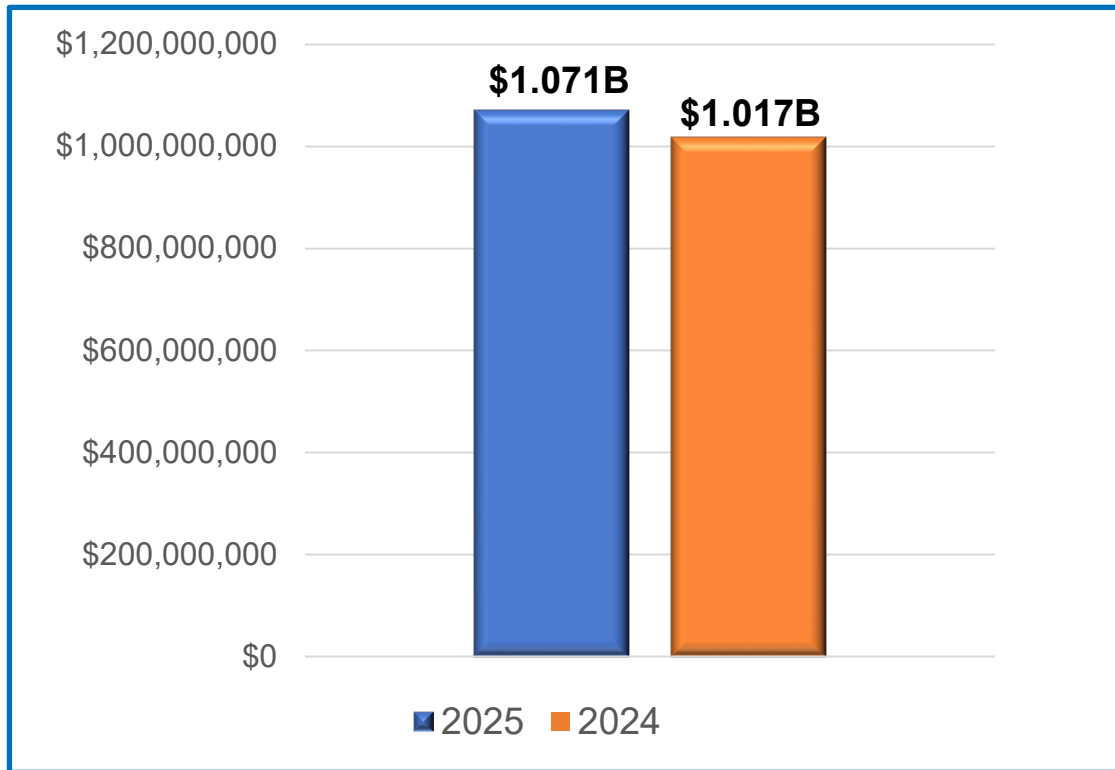
% Dollars Change vs Year Ago



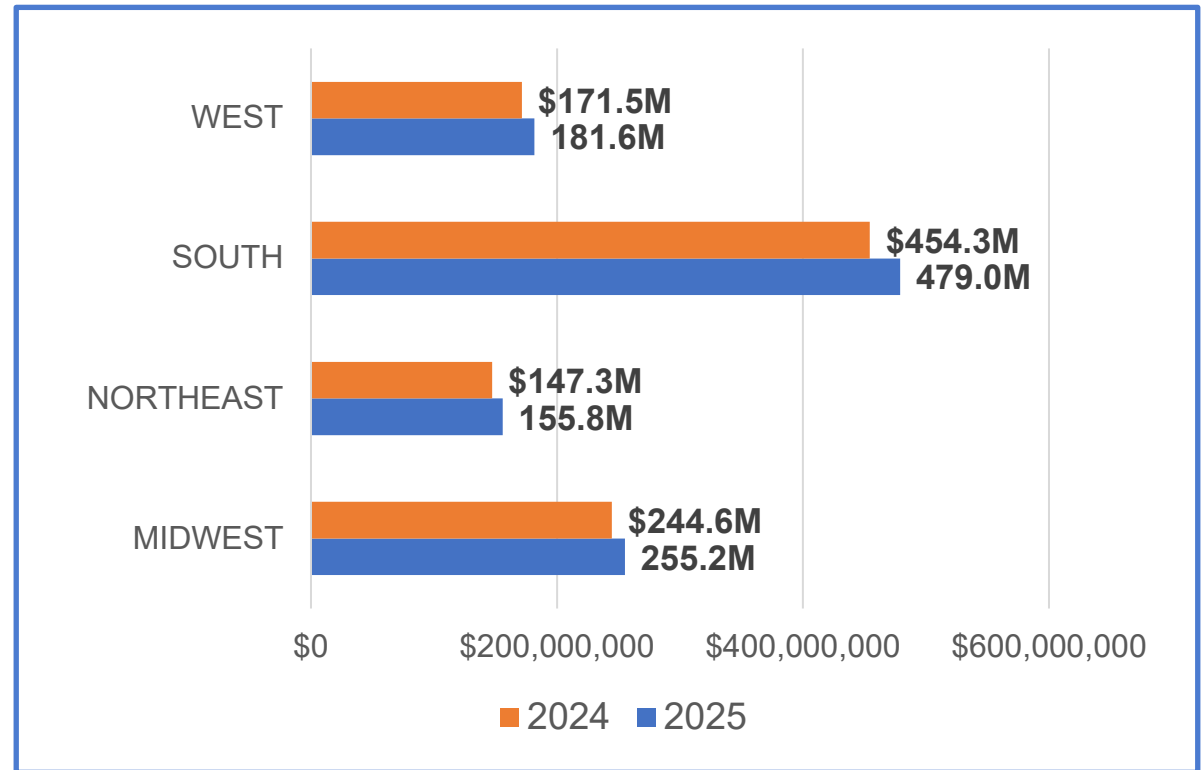
- The South represents 44% (\$483.7M) of total category sales dollars, followed by the Midwest (24%), the West (18%) and the Northeast (14%).
- All 4 regions experienced growth over the prior year.

# Total US MULO: SS BBQ Sauce - Subcategory

MULO Total US Dollars



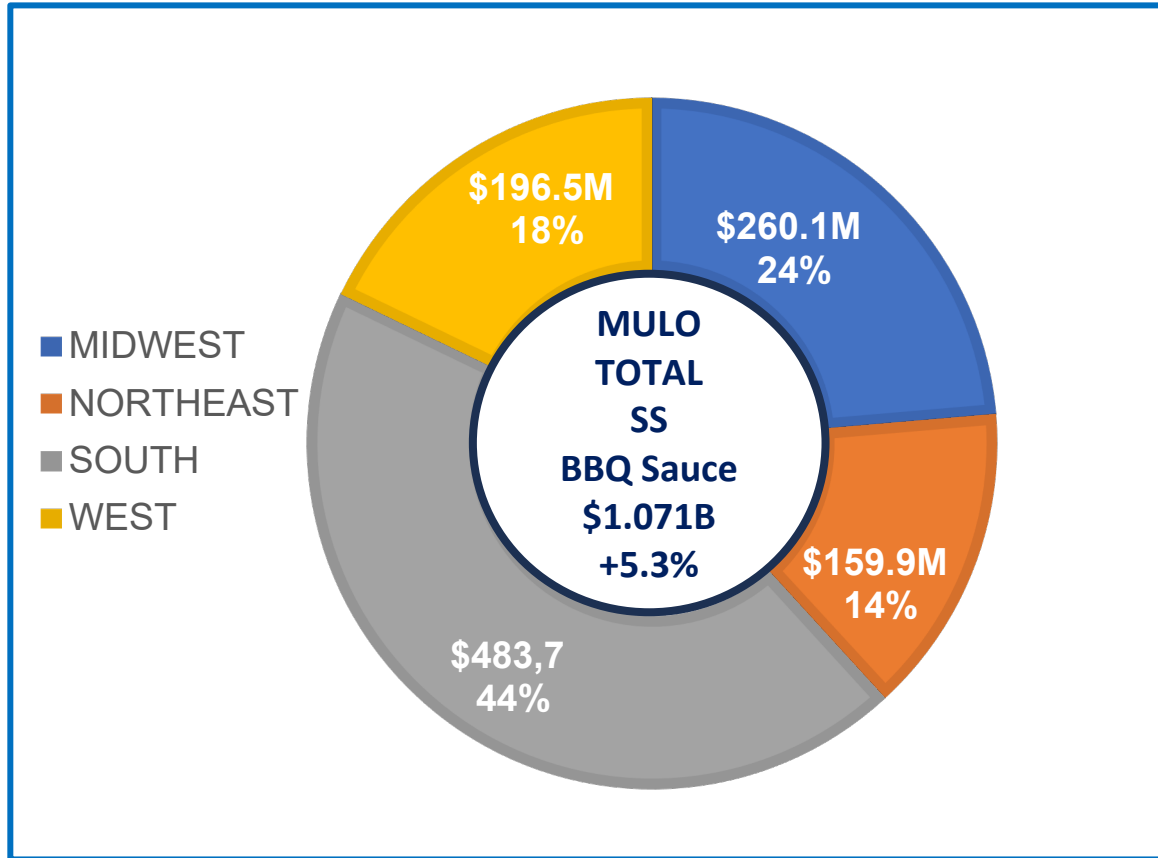
Dollar Change vs Year Ago



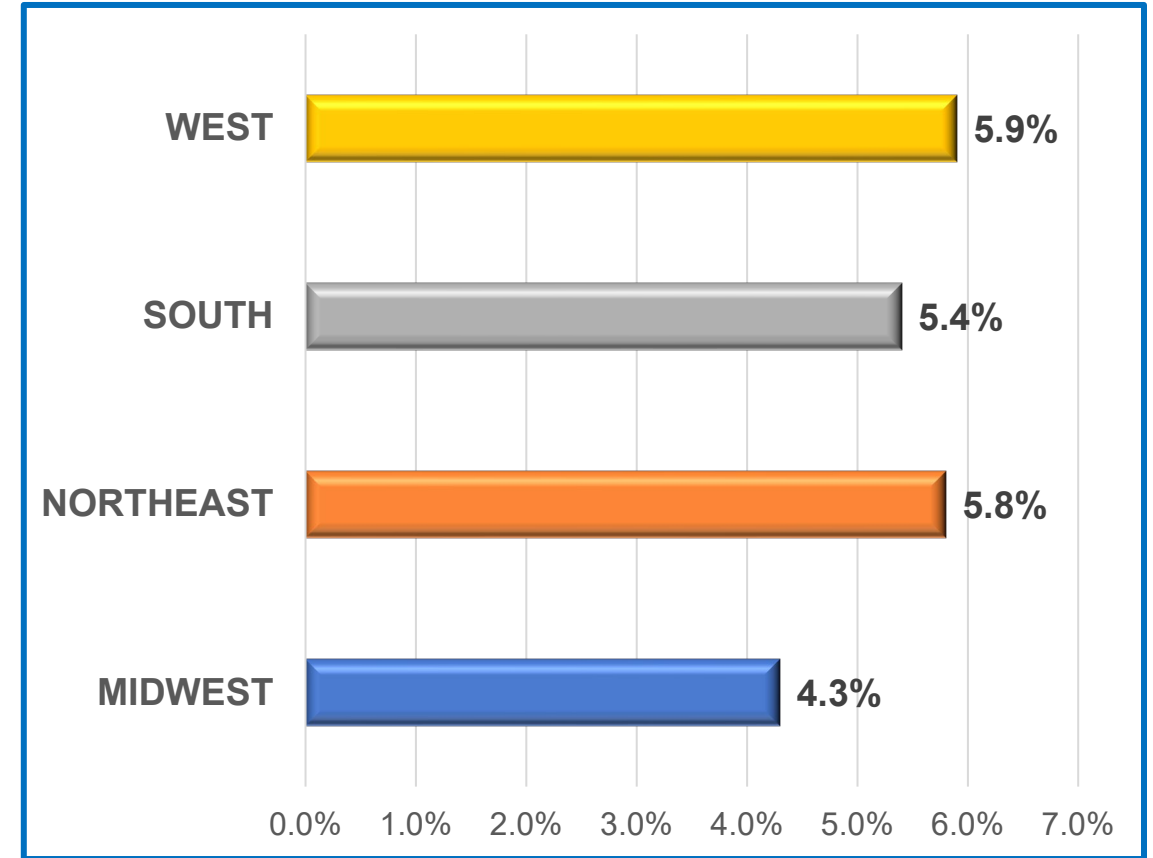
- Total US MULO \$ volume for SS BBQ Sauce is \$1.071B and grew 5.3% over prior year.
- The South region is the largest \$ volume region, followed by Midwest, West and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

# Total US MULO: SS BBQ Sauce - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South is the most highly developed region for this subcategory, responsible for 44% of \$ volume, with \$ growth of 5.4%.
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining 56% of \$ volume with respective growth of 5.8%, 5.9%, and 4.3%.

# MULO: SS BBQ Sauce

## Top Markets Northeast Census Region

Geography	Dollars	Dollars, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units % Chg, Yago	TDP	TDP, Yago	ARP	ARP, Yago
NEW YORK, NY - MULO	\$35,094,832	\$33,652,760	4.3	10,277,916	10,154,629	1.2	\$4,187.0	\$4,154.0	\$3.41	\$3.31
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$23,998,114	\$23,044,735	4.1	7,109,981	6,900,232	3.0	\$4,946.2	\$4,797.2	\$3.38	\$3.34
PHILADELPHIA, PA - MULO	\$19,052,464	\$17,968,222	6.0	5,866,524	5,630,239	4.2	\$5,121.7	\$4,932.4	\$3.25	\$3.19
HARRISBURG/SCRANTON, PA - MULO	\$14,663,205	\$13,472,377	8.8	4,706,620	4,351,596	8.2	\$5,422.5	\$5,215.2	\$3.12	\$3.10
BOSTON, MA - MULO	\$14,567,830	\$13,629,218	6.9	4,361,370	4,141,769	5.3	\$4,621.1	\$4,478.0	\$3.34	\$3.29
NEW ENGLAND - MULO	\$13,789,419	\$12,871,681	7.1	4,221,226	3,944,747	7.0	\$5,708.8	\$5,544.3	\$3.27	\$3.26
BUFFALO/ROCHESTER, NY - MULO	\$10,872,808	\$10,521,170	3.3	3,132,665	3,083,061	1.6	\$5,010.0	\$4,898.3	\$3.47	\$3.41
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$9,609,103	\$9,085,186	5.8	2,962,547	2,855,977	3.7	\$4,840.2	\$4,732.6	\$3.24	\$3.18
PITTSBURGH, PA - MULO	\$8,906,839	\$8,431,581	5.6	2,711,354	2,579,773	5.1	\$5,123.5	\$5,162.7	\$3.29	\$3.27
SYRACUSE, NY - MULO	\$4,828,976	\$4,634,285	4.2	1,463,671	1,420,531	3.0	\$5,669.9	\$5,453.3	\$3.30	\$3.26
ALBANY, NY - MULO	\$4,106,047	\$3,931,650	4.4	1,254,940	1,222,812	2.6	\$5,938.0	\$5,793.1	\$3.27	\$3.22
PROVIDENCE, RI - MULO	\$2,517,285	\$2,355,409	6.9	791,956	740,638	6.9	\$4,589.6	\$4,423.6	\$3.18	\$3.18

- New York is the largest market for SS BBQ Sauce, posting positive \$ sales growth of 4.3% and an increase in unit growth, +1.2%.
- New England, the 6<sup>th</sup> largest market, responsible for \$14M in sales, is showing dollar growth of +7.1% and unit growth of +7.0%.
- Harrisburg/Scranton, the 4<sup>th</sup> ranked market in \$ sales, is showing the highest dollar and unit growth at 8.8% and 8.2%, respectively.

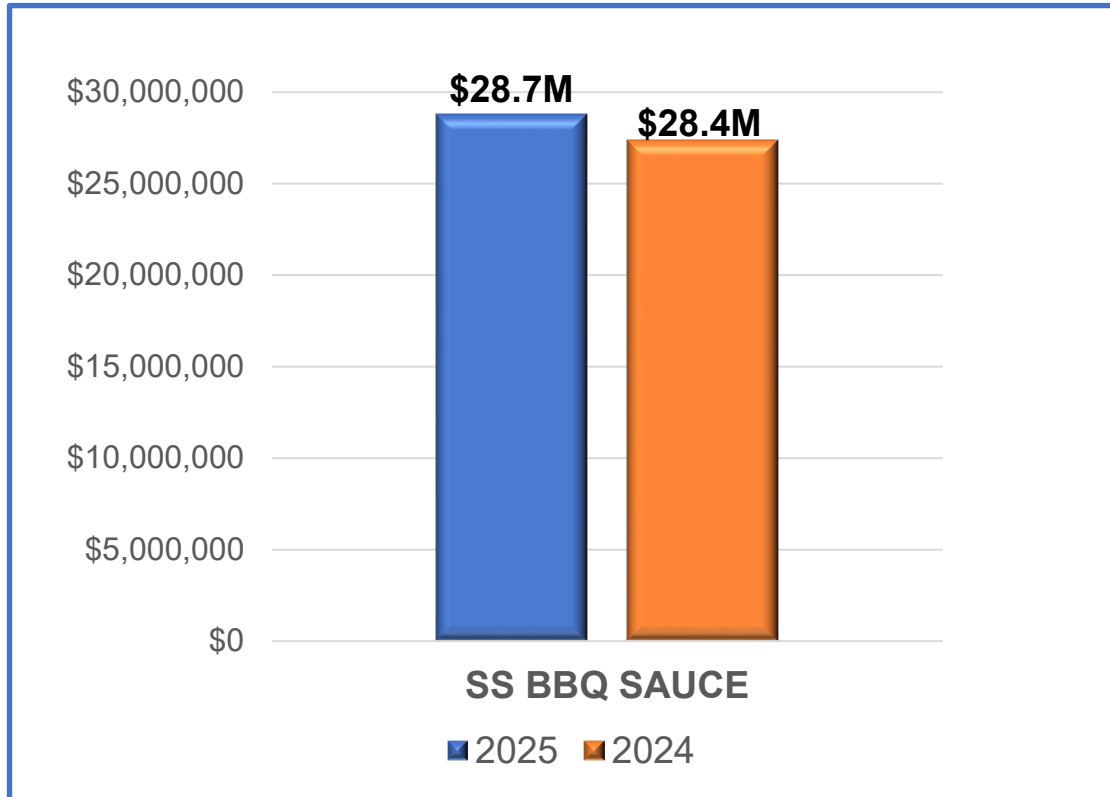
## MULO: SS BBQ Sauce Top 10 Brands Northeast Census Region

Brand	Dollars	Dollars, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago
<b>SS BBQ SAUCE</b>	<b>\$155,800,057</b>	<b>\$147,262,832</b>	<b>5.8</b>	<b>47,214,143</b>	<b>45,264,107</b>	<b>4.3</b>			<b>\$3.30</b>	<b>\$3.25</b>
SWEET BABY RAYS	\$74,029,286	\$73,520,062	0.7	23,480,614	23,099,848	1.6	93.7	13.6	\$3.15	\$3.18
KRAFT	\$10,698,168	\$11,166,727	-4.2	4,527,196	4,968,941	-8.9	71.9	5.2	\$2.36	\$2.25
PRIVATE LABEL	\$10,237,706	\$8,997,474	13.8	4,937,558	4,476,875	10.3	75.1	4.4	\$2.07	\$2.01
BACHANS	\$9,200,960	\$5,861,786	57.0	1,208,730	720,986	67.6	69.9	3.9	\$7.61	\$8.13
STUBBS	\$8,500,664	\$8,079,819	5.2	1,882,653	1,842,469	2.2	76.6	4.6	\$4.52	\$4.39
KINDERS	\$7,333,913	\$3,305,704	121.9	2,041,354	886,644	130.2	57.8	4.7	\$3.59	\$3.73
G HUGHES	\$5,296,117	\$5,248,600	0.9	1,129,657	1,143,655	-1.2	65.2	4.2	\$4.69	\$4.59
STICKY FINGERS RIBHOUSE	\$2,497,094	\$2,616,889	-4.6	800,041	814,585	-1.8	52.6	3.4	\$3.12	\$3.21
DINOSAUR BAR-B-QUE	\$2,401,057	\$2,485,002	-3.4	544,464	577,030	-5.6	30.2	2.2	\$4.41	\$4.31
RIB RACK	\$2,046,479	\$1,957,104	4.6	433,238	439,730	-1.5	39.5	3.8	\$4.72	\$4.45

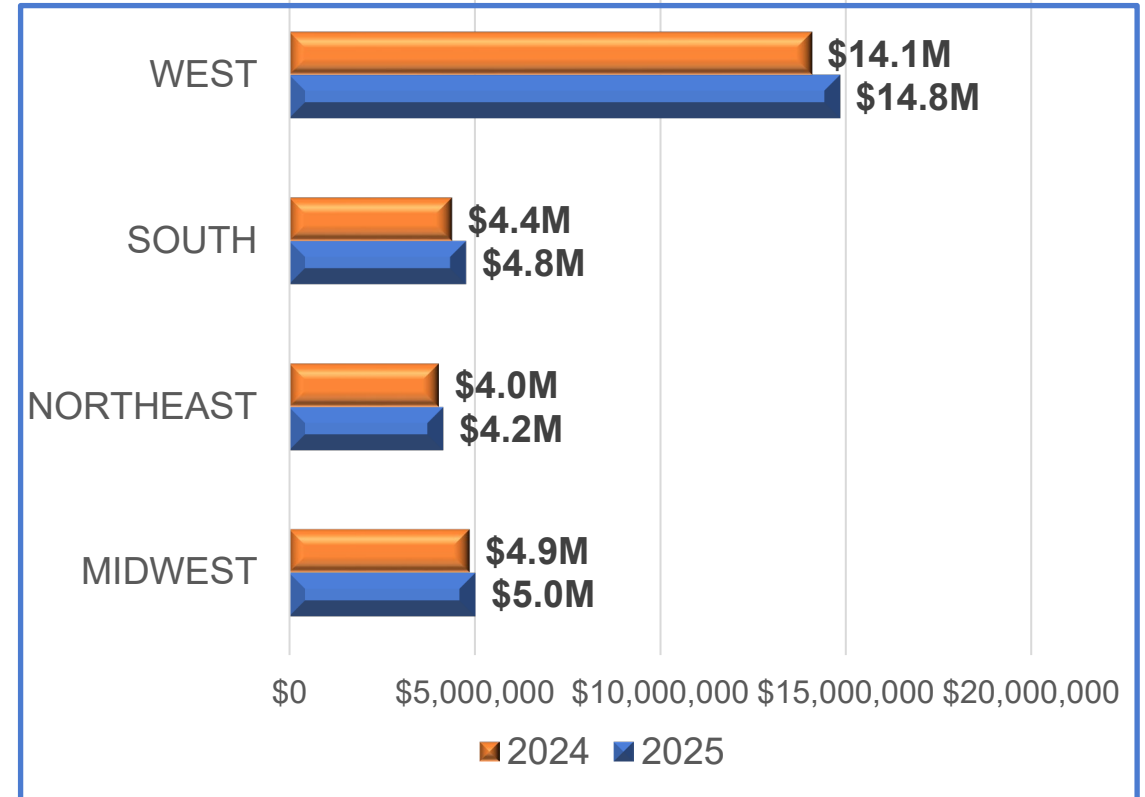
- MULO Northeast SS BBQ Sauce is showing 5.8% growth over prior year in \$ volume with unit sales at 4.3%.
- Private Label brands (retailer brands produced by others) are highly developed in \$ sales and growing at 13.8% in \$ sales and 10.3% in unit sales.
- Sweet Baby Rays, the lead brand, growing in both \$ and unit sales, commands 48% share of total segment \$ sales in the Northeast.
- Kinder's, the 6<sup>th</sup> brand, is experiencing the highest growth in both Dollar & Unit Volume, at + 121.9% and +130.2%, respectively.

# Natural Channel: SS BBQ Sauce - Subcategory

Natural Channel Total US Dollars



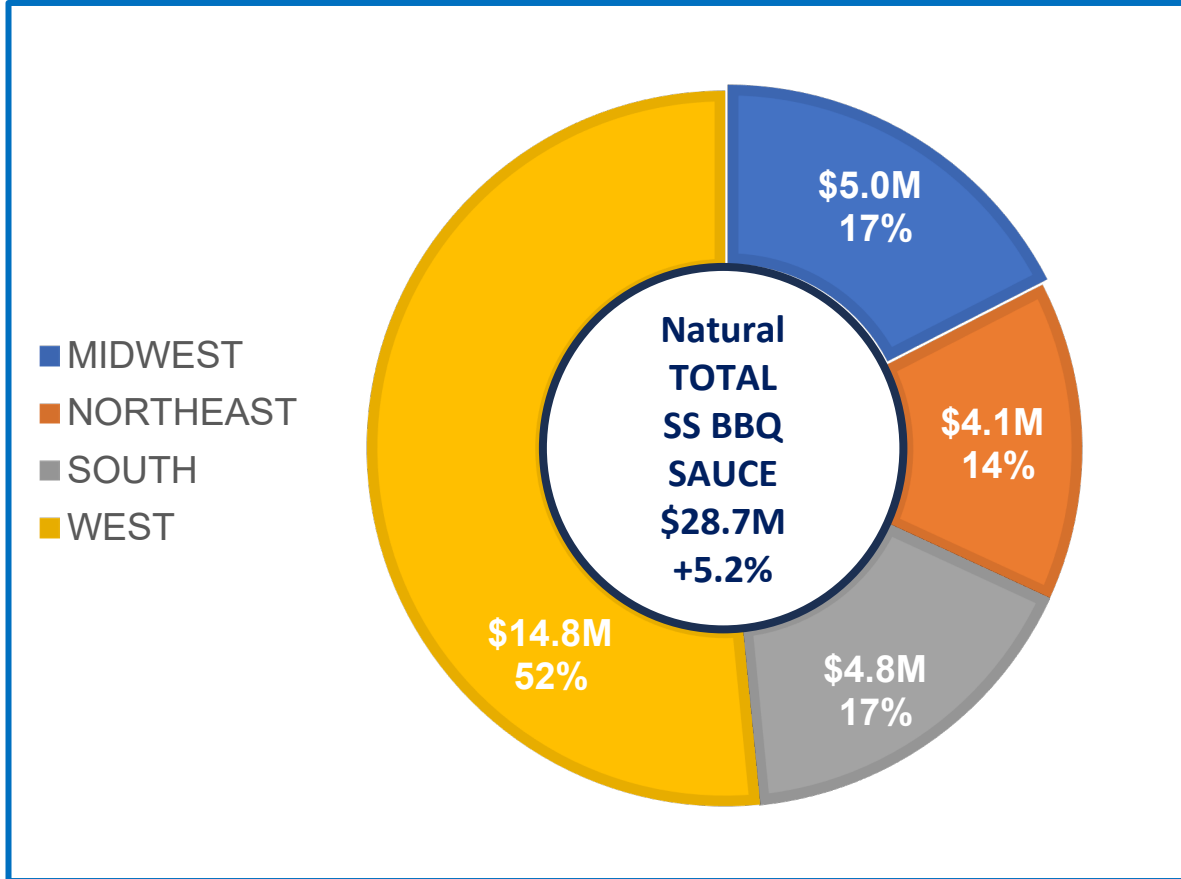
Dollar Change vs Year Ago



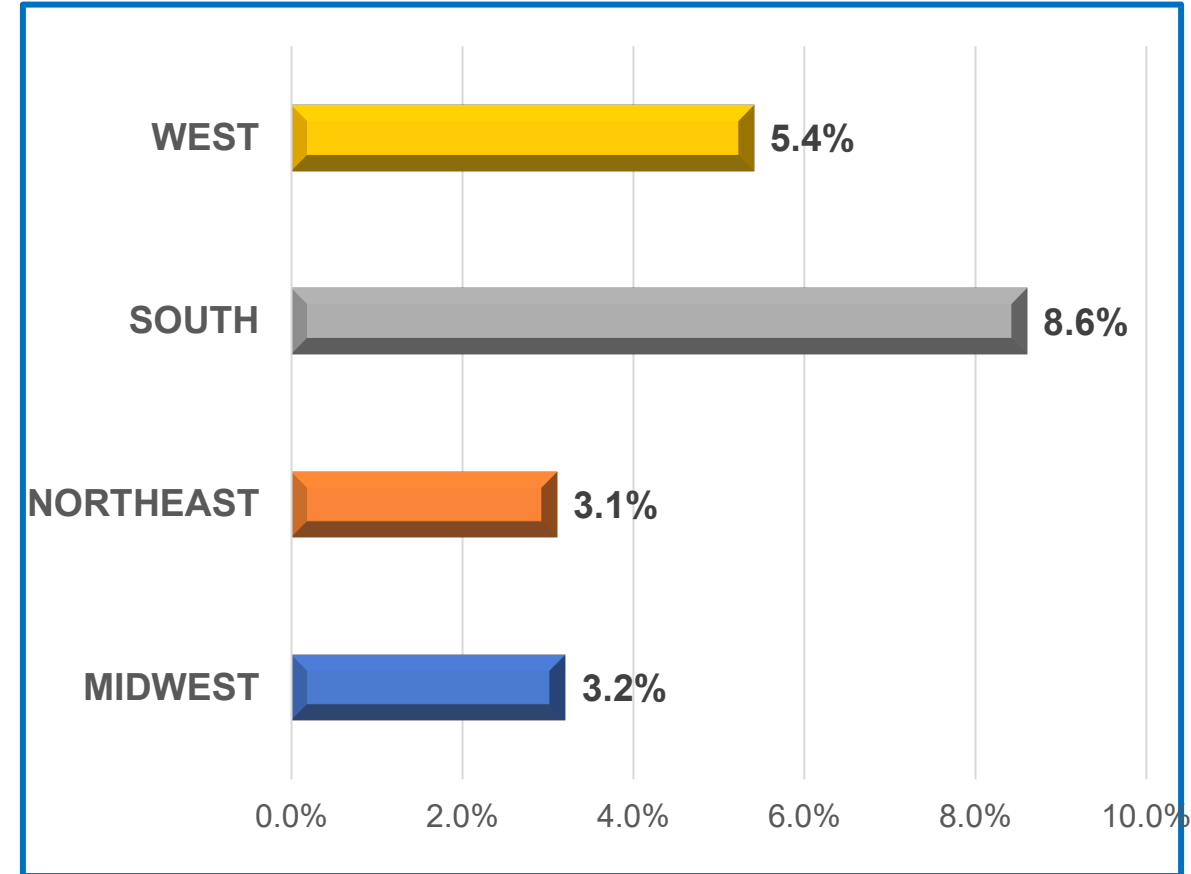
- Total Natural Channel \$ volume for the SS BBQ Sauce subcategory is \$28.7M and is up 5.2% over prior year.
- The West region is the largest \$ volume region, followed by the South, Midwest and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

# Natural Channel: SS BBQ Sauce - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region, the most highly developed region for this subcategory, is responsible for 52% of \$ volume and is up +5.4% to prior year.
- The 3 remaining regions, Northeast, South and Midwest, are responsible for the remaining 48% of \$ volume, with respective growth of 3.1%, 8.6%, and 3.2%. The South experienced the highest % growth among the regions, followed by the West.

## Natural Channel: SS BBQ Sauce Top 10 Brands Northeast Census Region

Brand	Dollars	Dollars,	Dollars %	Units	Units,	Units %	Average			ARP, Yago	
		Yago	Chg, Yago		Yago	Chg, Yago	Avg % ACV	Items Selling	ARP		
<b>BBQ SAUCE</b>	<b>\$4,156,275</b>	<b>\$4,032,358</b>	<b>3.1</b>	<b>774708.7</b>	<b>768234.4</b>	<b>0.8</b>				<b>\$5.36</b>	<b>\$5.25</b>
BACHANS	\$701,698	\$619,856	13.2	81382.1	71173	14.3	74.8	3.7	\$8.62	\$8.71	
SWEET BABY RAYS	\$637,691	\$682,559	-6.6	190280.8	200541	-5.1	65.5	6.4	\$3.35	\$3.40	
STUBBS	\$364,998	\$381,307	-4.3	70894	73453.9	-3.5	59.5	4.7	\$5.15	\$5.19	
LILLIES Q	\$294,873	\$305,172	-3.4	37995.9	37785	0.6	46.8	3.9	\$7.76	\$8.08	
PRIMAL KITCHEN	\$225,447	\$200,047	12.7	40122.3	35988.3	11.5	52.8	2.4	\$5.62	\$5.56	
WOODSTOCK	\$196,696	\$168,986	16.4	38283	33406.5	14.6	33.6	2.3	\$5.14	\$5.06	
RUFUS TEAGUE	\$181,559	\$155,474	16.8	24319.6	22018.5	10.5	42.1	3	\$7.47	\$7.06	
BONE SUCKIN SAUCE	\$173,391	\$184,376	-6.0	21047	22491.6	-6.4	36.1	2.1	\$8.24	\$8.20	
KINDERS	\$153,151	\$67,864	125.7	32526.7	14061.4	131.3	31.9	4.3	\$4.71	\$4.83	
KRAFT	\$125,502	\$133,395	-5.9	40831.3	44123.4	-7.5	34.5	3.3	\$3.07	\$3.02	

- Northeast Natural Channels, is showing +3.1% growth over prior year in \$ sales and is also growing in unit sales, at +0.8%.
- Bachan's, the largest \$ volume brand, garnering 17% of the subcategory \$ sales is experiencing high growth in both Dollars and Units, +13.2% and +14.3%, respectively.
- Kinders, the 8<sup>th</sup> largest brand in \$ volume, is the highest growth brand in the subcategory at +125.7% in Dollars and +31.9% in Units.
- Rufus Teague and Woodstock brands are showing the highest dollar growth; +16.8% and +16.4%

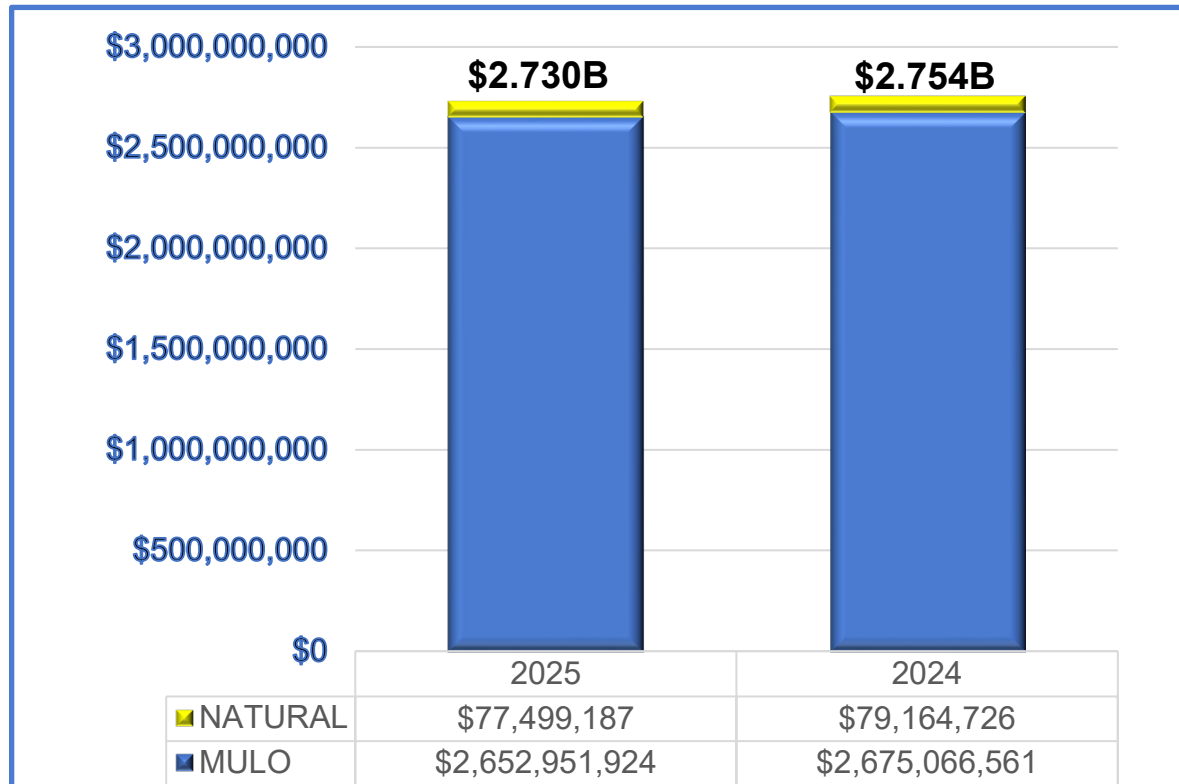
# SS DRESSING

## Sub-category Performance

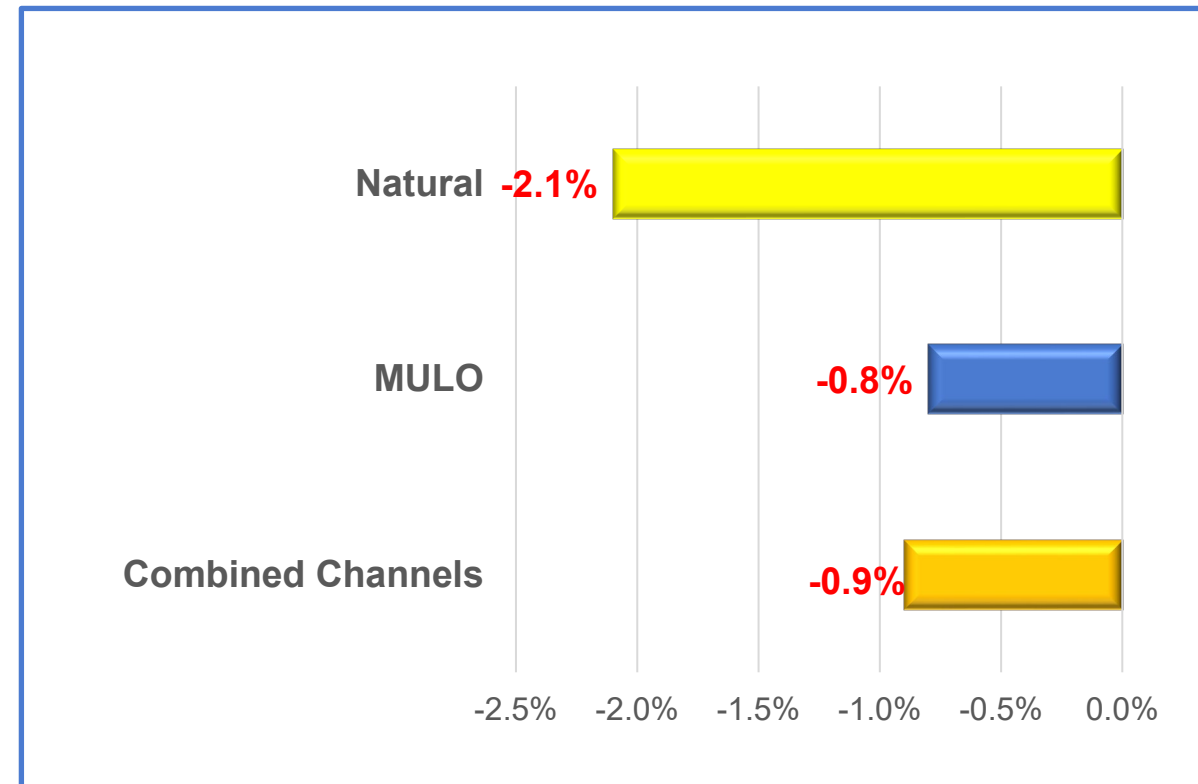
*SPINS Satori - 52 Weeks Ending April 20, 2025*

# Total US SS Dressing Subcategory

Total US Dollars



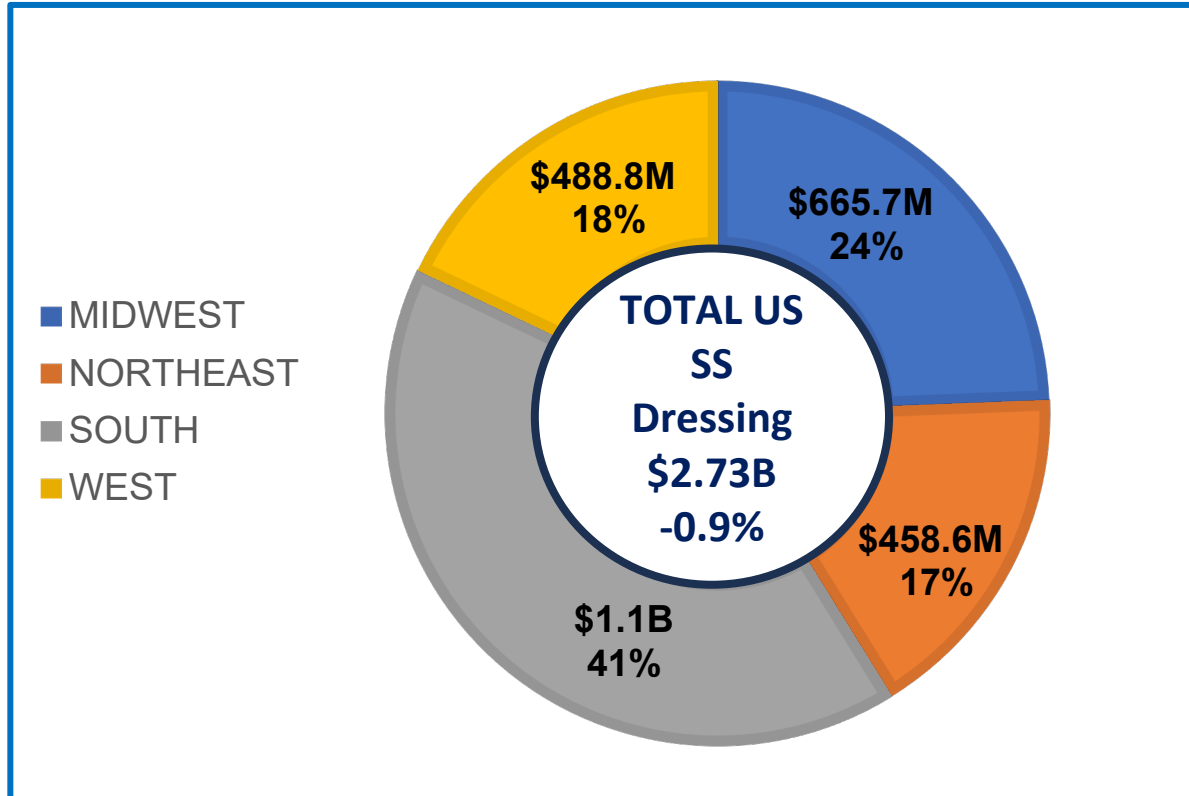
% Dollar Change vs Year Ago



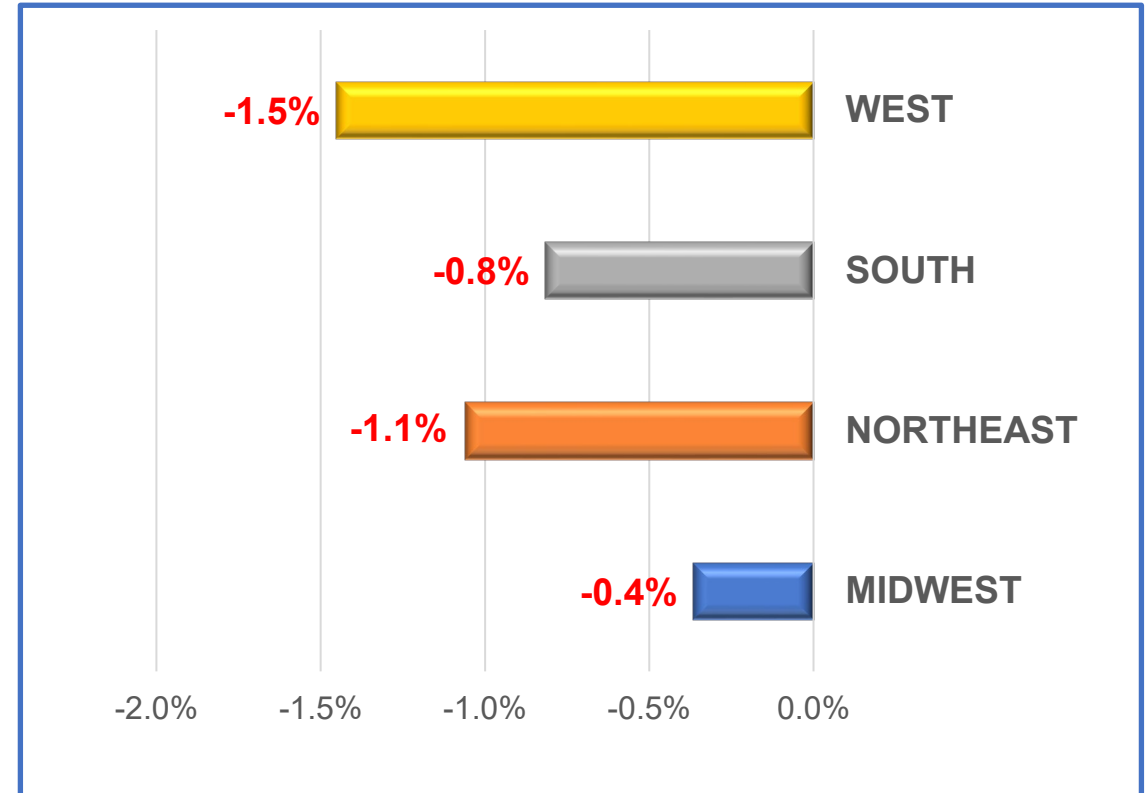
- Total US SS Dressing is a \$2.730B Category and is in slight decline to prior year by -0.9%.
- Sales dollars were in decline in the Natural Channel, -2.1% and MULO, -0.8%.

# Total US - SS Dressing - By Region

Total Dollars and % Category Share by Region



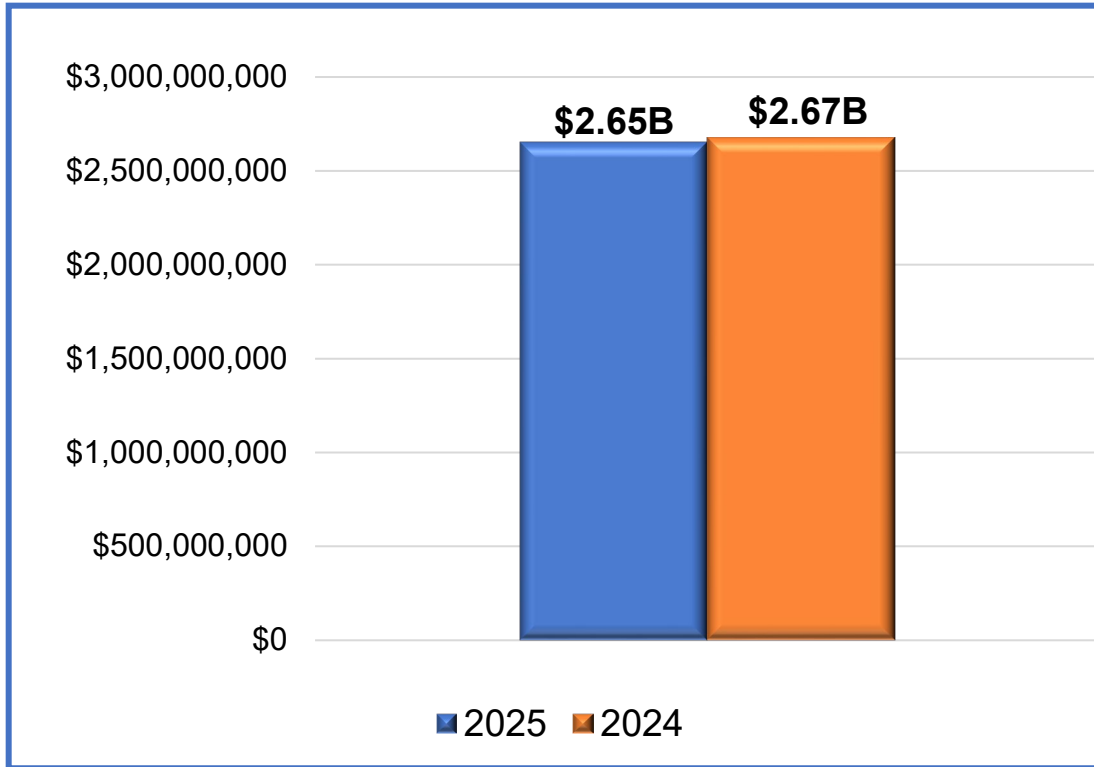
% Dollar Change vs Year Ago



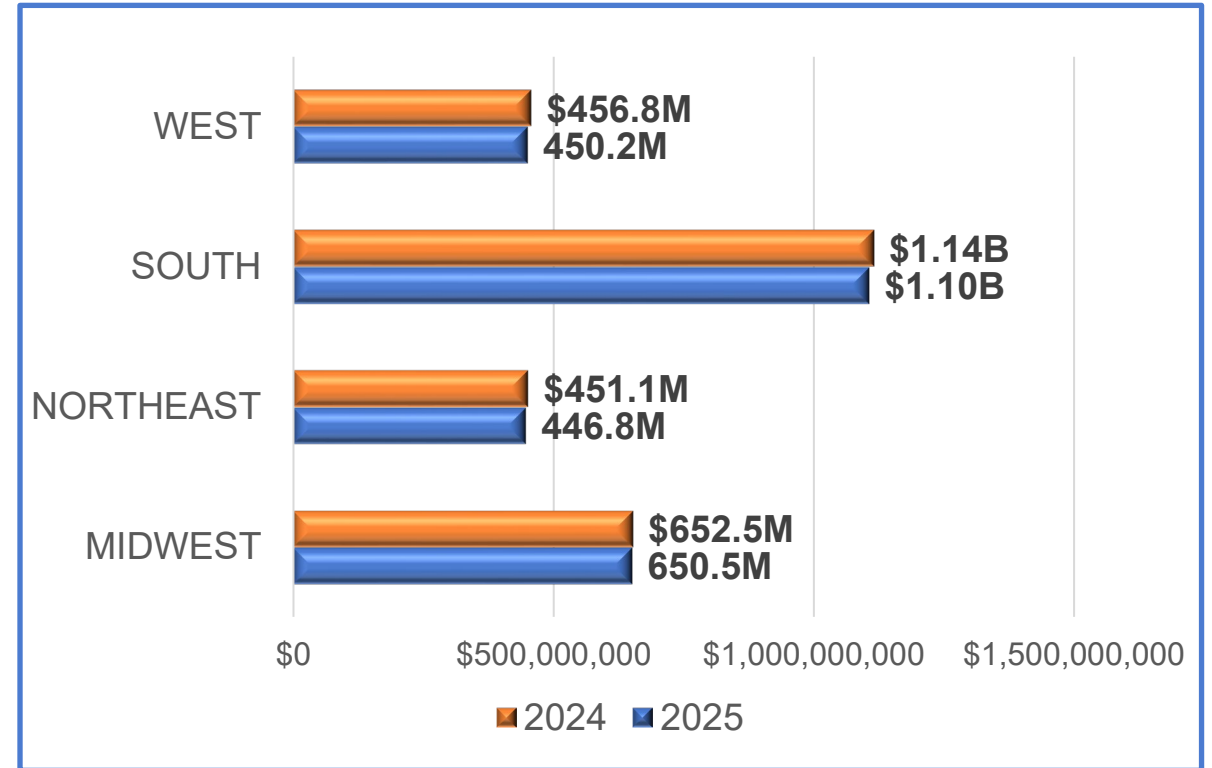
- The South is the most highly developed region for this sub-category, responsible for 41% of \$ volume with a decline at -0.8%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining \$ volume with respective declines of -1.5%, -1.1 % and -0.4%.

# Total US MULO: SS Dressing Subcategory

MULO Total US Dollars



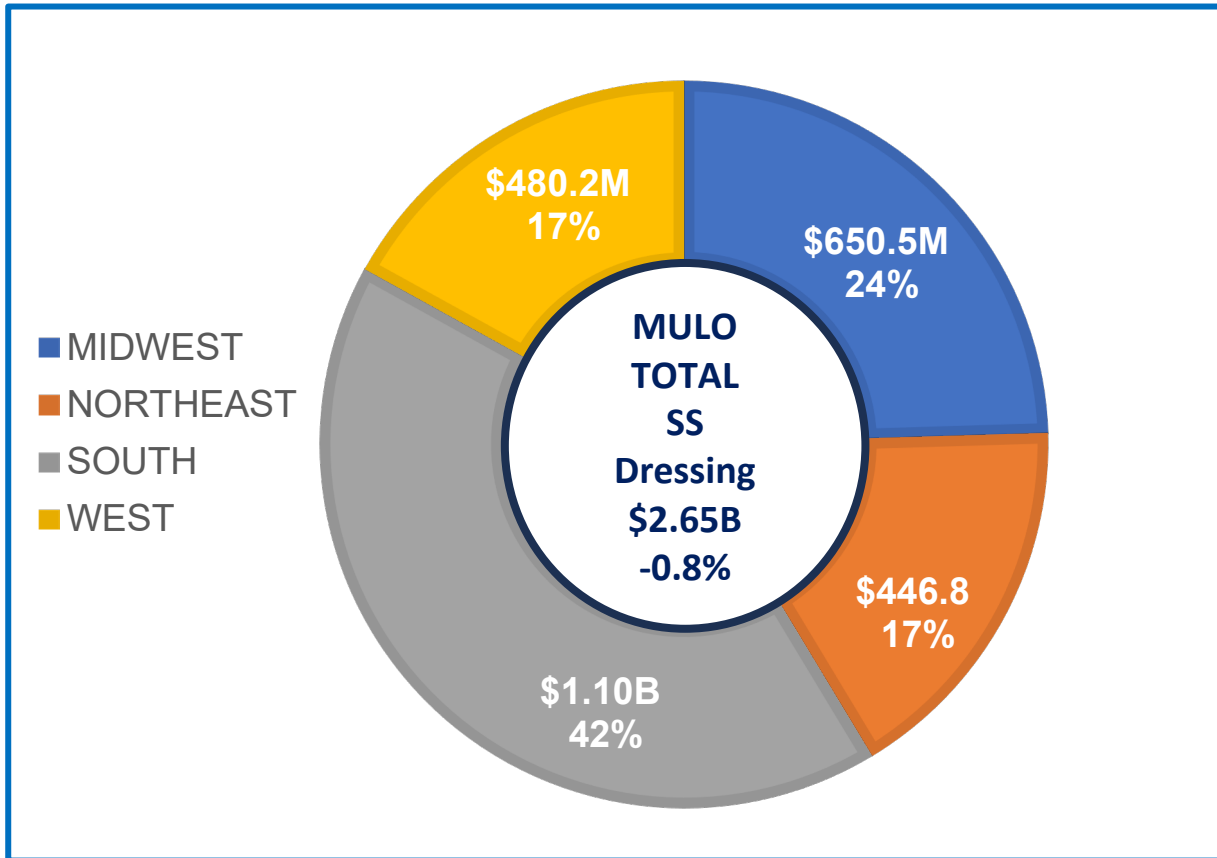
Dollar Change vs Year Ago



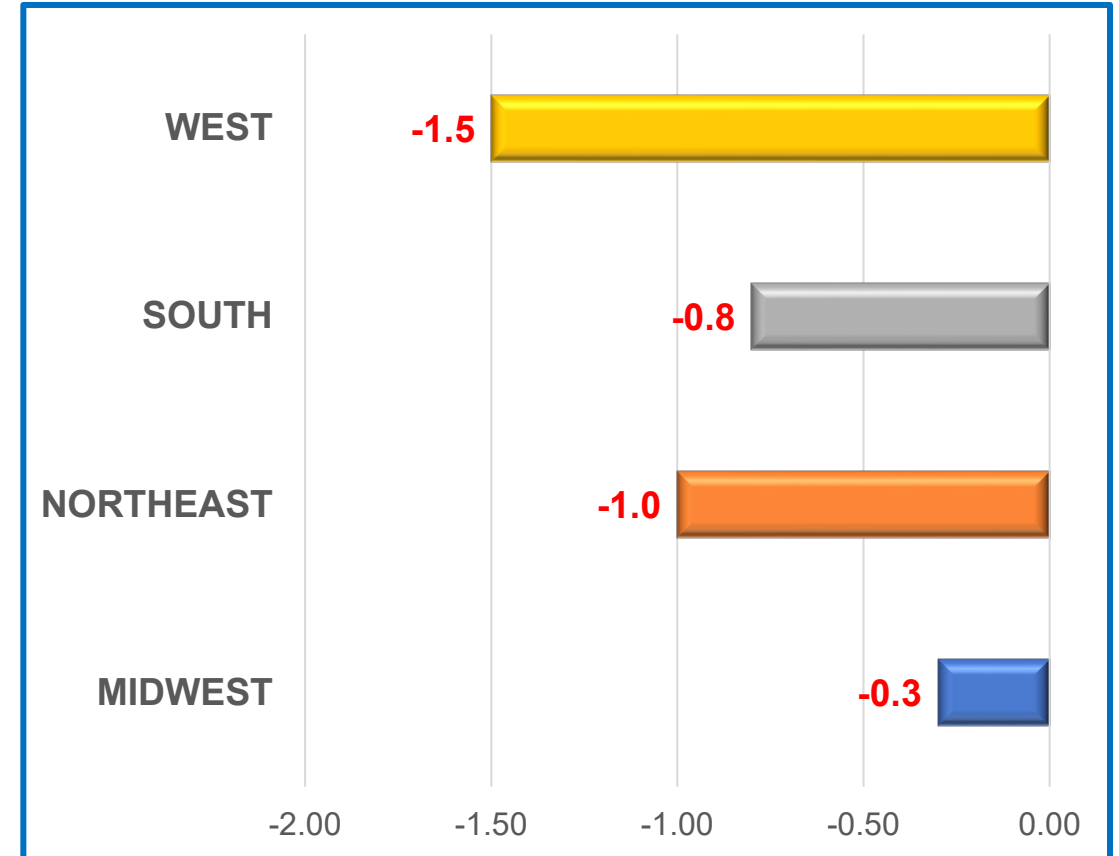
- Total US MULO \$ volume SS Dressing is \$2.65B and in slight decline in dollar volume to prior year by -0.8%.
- The South is the largest \$ volume region, followed by Midwest, West and Northeast, respectively.
- All 4 census regions and Total US are posting less \$ sales to prior year.

# MULO: SS Dressing Subcategory

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South is the most highly developed region for this subcategory, responsible for 42% of \$ volume with decline of -0.8%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 58%; all are showing dollar decline to prior year.

# MULO: SS Dressing

## Top 10 Brands Northeast Census Region

Description	Dollars			Units %		Average		ARP, Yago		
	Dollars	Dollars, Yago	% Chg, Yago	Units	Units, Yago	Chg, Yago	Avg % ACV		Items Selling	
<b>SS DRESSING</b>	<b>\$446,805,234</b>	<b>\$451,101,671</b>	<b>-1.0</b>	<b>137,408,865</b>	<b>137,667,648</b>	<b>-0.2</b>			<b>\$3.25</b>	<b>\$3.28</b>
KENS STEAK HOUSE	\$111,376,592	\$112,160,875	-0.7	36,645,052	36,279,709	1.0	83.6	39.2	\$3.04	\$3.09
PRIVATE LABEL	\$76,210,177	\$73,618,561	3.5	33,204,946	31,948,398	3.9	84.8	14.2	\$2.30	\$2.30
HIDDEN VALLEY RANCH	\$71,045,397	\$68,101,221	4.3	13,467,272	12,724,573	5.8	92.7	12.3	\$5.28	\$5.35
WISH-BONE	\$62,427,483	\$65,209,695	-4.3	23,161,895	23,930,059	-3.2	79.3	24.9	\$2.70	\$2.73
KRAFT	\$27,745,164	\$31,086,576	-10.7	8,424,409	9,278,731	-9.2	85.1	13.8	\$3.29	\$3.35
OLIVE GARDEN	\$19,922,929	\$20,332,092	-2.0	3,754,642	3,851,799	-2.5	84.3	4.7	\$5.31	\$5.28
BRIANNAS	\$15,279,413	\$14,802,077	3.2	3,691,235	3,548,238	4.0	74.7	9.9	\$4.14	\$4.17
NEWMANS OWN	\$12,981,094	\$13,659,943	-5.0	3,055,533	3,183,845	-4.0	69.2	9.7	\$4.25	\$4.29
PRIMAL KITCHEN	\$7,369,997	\$6,416,663	14.9	1,030,167	925,760	11.3	62.7	6	\$7.15	\$6.93
SKINNY GIRL	\$5,005,202	\$4,779,193	4.7	1,859,581	1,803,761	3.1	50.8	6.3	\$2.69	\$2.65

- SS Dressing in Northeast MULO is in decline -1.0% in \$ volume over prior year and is also in decline in unit volume, at -0.2%.
- Ken's Steakhouse is the leading brand within this subcategory in the Northeast, with \$111.3M in \$ volume, declining -0.7%, but is growing in unit volume at +1.0%.
- Private Label, ranking 2<sup>nd</sup> in this subcategory in overall \$ volume, is registering +3.5% growth and is showing a +3.9% increase in unit volume, year over year.
- Primal Kitchen is the fastest growing brand of the Top 10 brands in the Northeast; +14.9% in dollar volume and +11.3% in units.

# MULO: SS Dressing

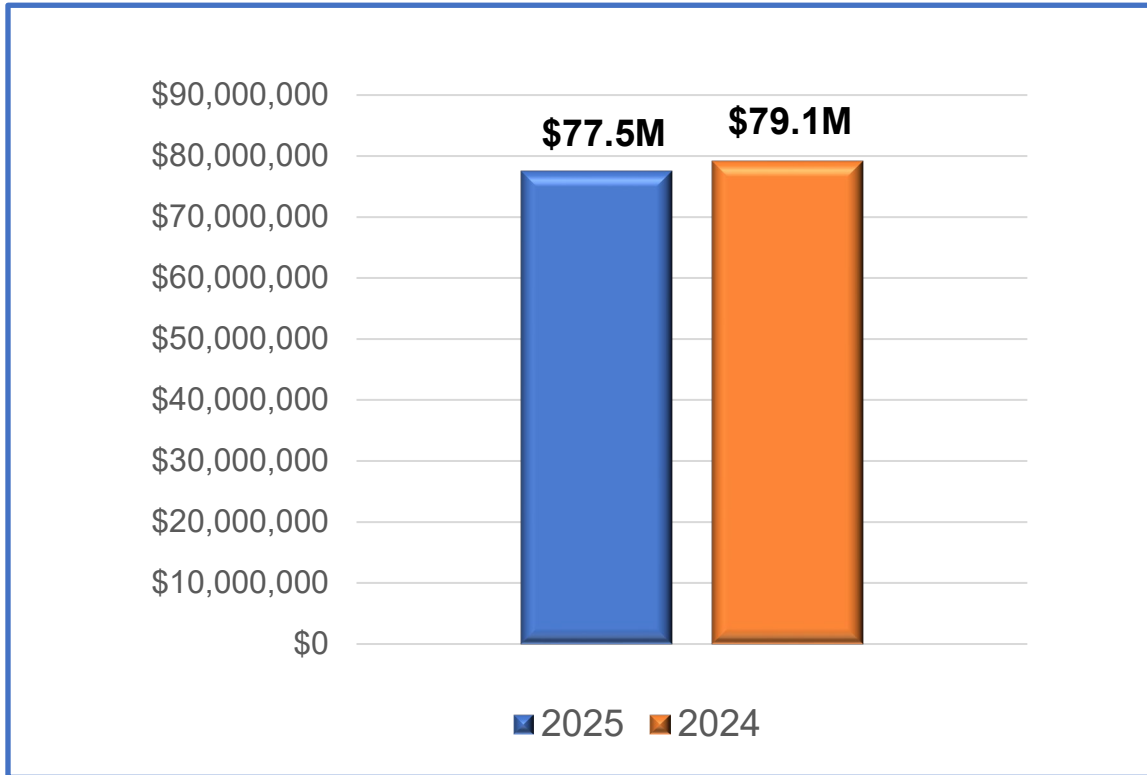
## Top Markets Northeast Census Region

Geography	Dollars		Dollars % Chg,	Units		Units % Chg,	TDP,		ARP,	
	Dollars	Yago	Yago	Units	Units, Yago	Yago	TDP	Yago	ARP	Yago
NEW YORK, NY - MULO	\$90,335,763	\$92,162,611	-2.0	27,155,695	27,673,065	-1.9	\$11,984.6	\$11,897.8	\$3.33	\$3.33
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$63,032,807	\$64,069,565	-1.6	18,288,960	18,519,493	-1.2	\$13,966.2	\$14,671.7	\$3.45	\$3.46
PHILADELPHIA, PA - MULO	\$52,880,036	\$53,232,952	-0.7	16,351,241	16,306,918	0.3	\$14,335.9	\$14,311.3	\$3.23	\$3.26
BOSTON, MA - MULO	\$46,415,579	\$46,988,794	-1.2	14,325,036	14,334,144	-0.1	\$15,150.4	\$15,143.0	\$3.24	\$3.28
HARRISBURG/SCRANTON, PA - MULO	\$43,989,780	\$43,359,390	1.5	13,673,471	13,412,859	1.9	\$14,841.6	\$15,041.8	\$3.22	\$3.23
NEW ENGLAND - MULO	\$42,610,390	\$42,701,525	-0.2	13,230,818	13,083,460	1.1	\$16,689.7	\$17,065.9	\$3.22	\$3.26
PITTSBURGH, PA - MULO	\$28,848,177	\$29,515,428	-2.3	8,110,261	8,212,032	-1.2	\$12,692.4	\$12,493.3	\$3.56	\$3.59
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$27,853,690	\$28,415,821	-2.0	9,074,177	9,140,021	-0.7	\$15,028.4	\$15,356.0	\$3.07	\$3.11
BUFFALO/ROCHESTER, NY - MULO	\$27,471,705	\$27,906,838	-1.6	8,833,209	8,883,668	-0.6	\$12,633.3	\$12,490.9	\$3.11	\$3.14
SYRACUSE, NY - MULO	\$13,467,288	\$13,601,341	-1.0	4,346,019	4,359,305	-0.3	\$13,862.0	\$13,648.5	\$3.10	\$3.12
ALBANY, NY - MULO	\$12,232,153	\$12,259,580	-0.2	3,870,364	3,885,534	-0.4	\$15,718.0	\$16,231.1	\$3.16	\$3.16
PROVIDENCE, RI - MULO	\$7,933,967	\$7,960,199	-0.3	2,479,822	2,454,239	1.0	\$14,151.5	\$14,579.1	\$3.20	\$3.24

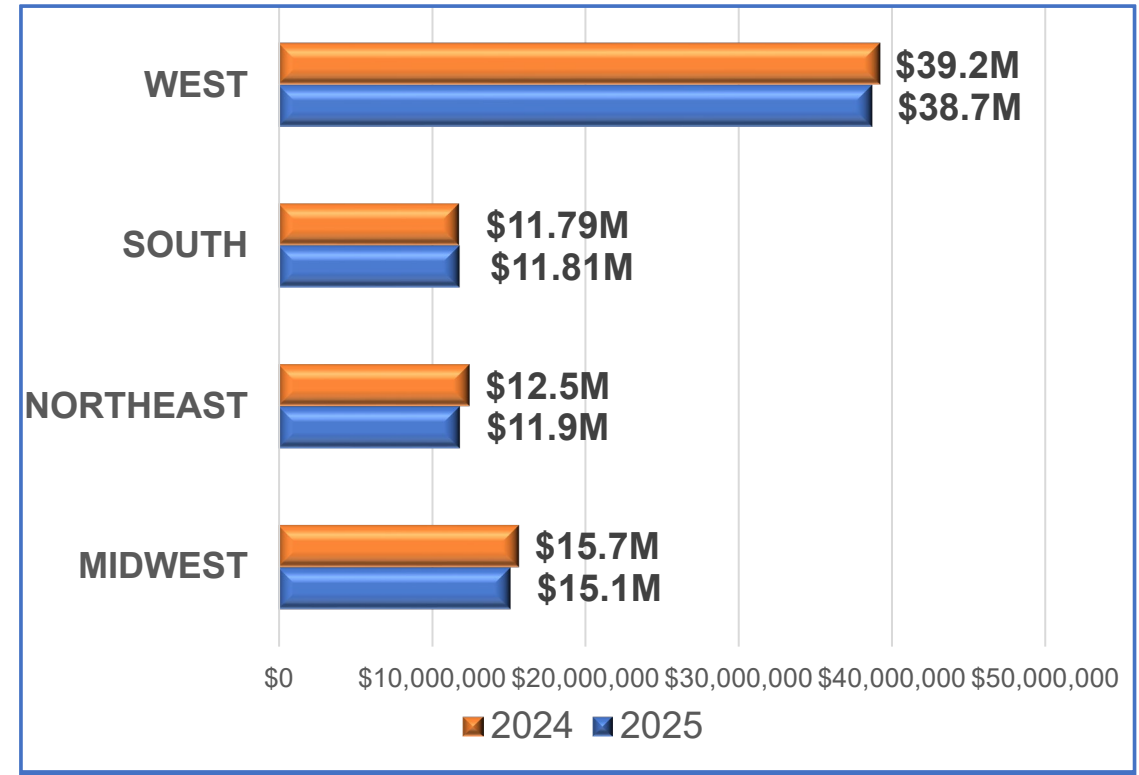
- New York is the largest market for SS Dressing, posting negative \$ sales growth of -2.0% and decrease in unit growth of -1.9%.
- New England, the 6th largest market, is responsible for \$42.6M in sales, and is showing a slight dollar decline of -0.2% and unit increase of +1.1%.
- Harrisburg/Scranton, the 5<sup>th</sup> largest market, is showing the greatest dollar and unit sales increase of all markets in the Northeast.

# Natural Channel: SS Dressing - Subcategory

Natural Channel Total US Dollars



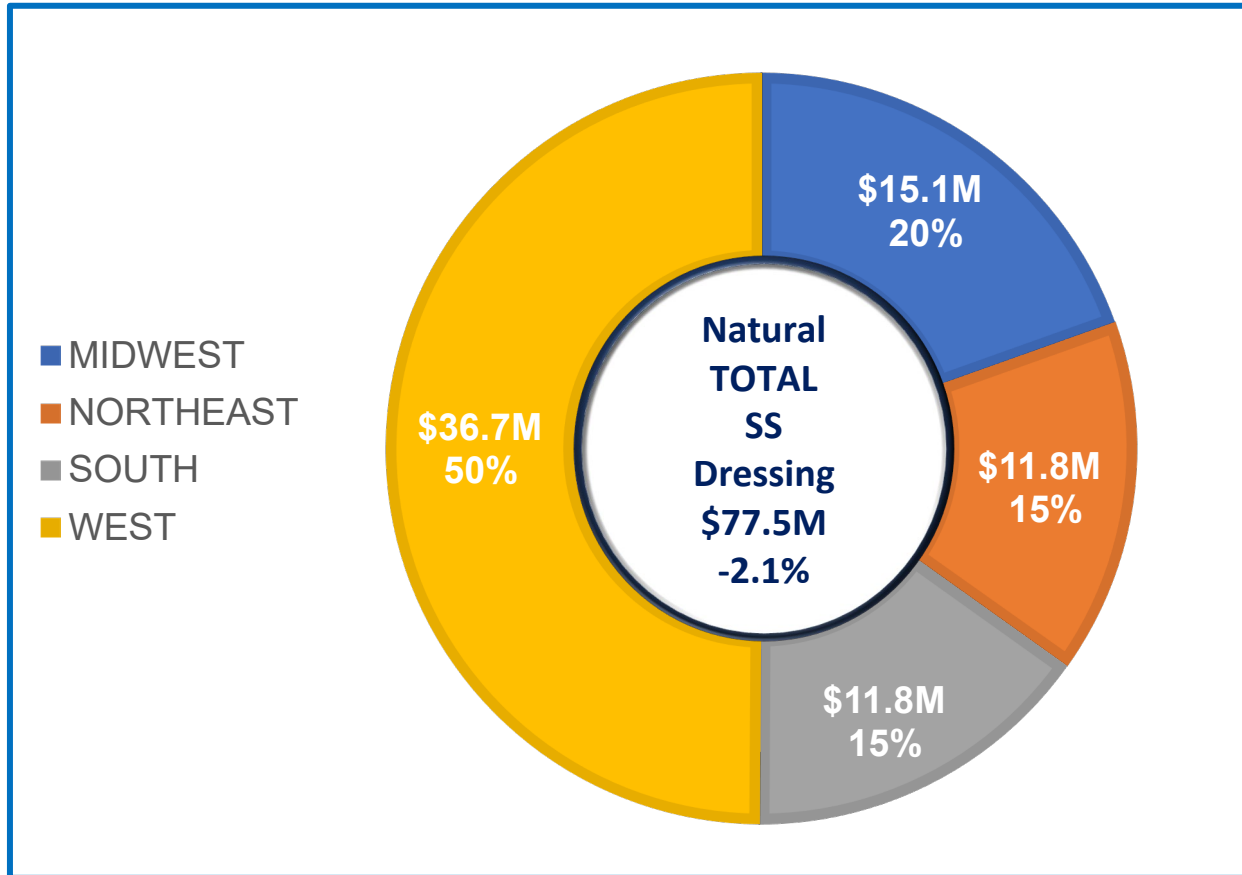
Dollar Change vs Year Ago



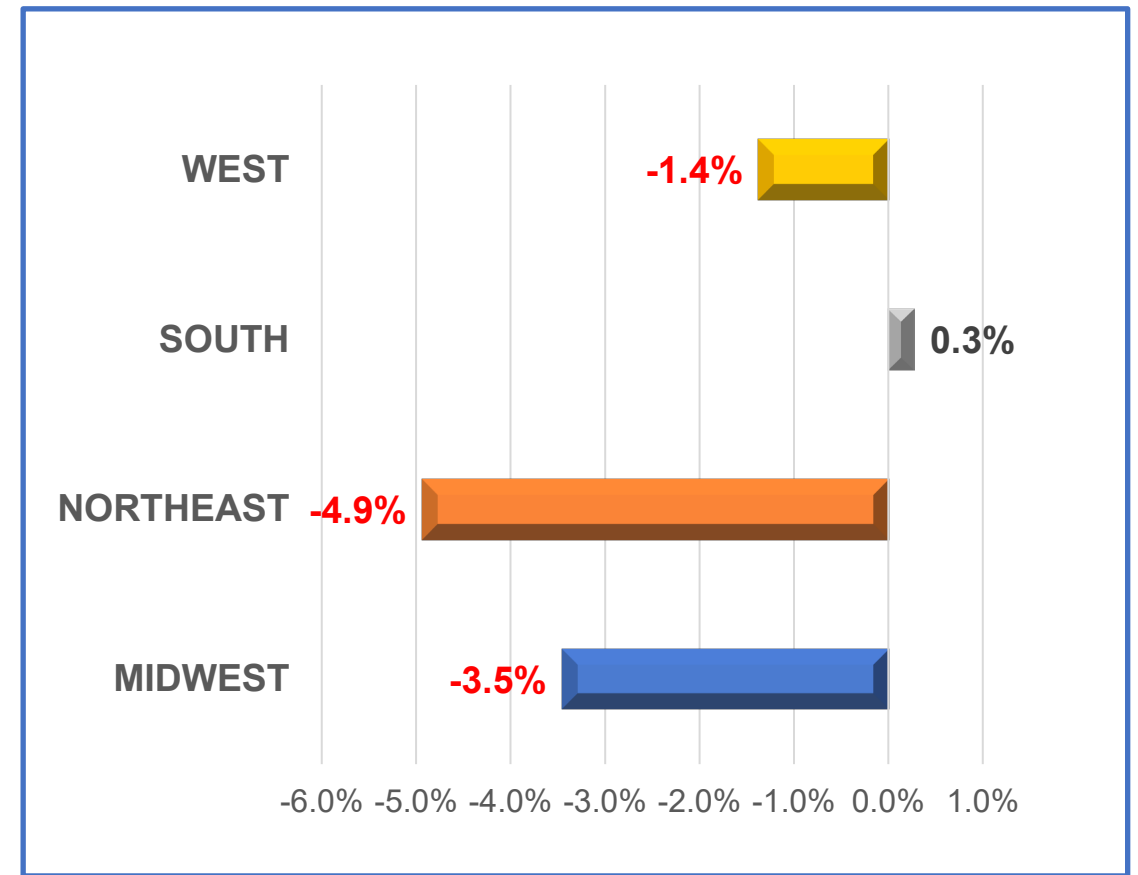
- Total Natural Channel \$ volume for the SS Dressing subcategory is \$77.5M and is in decline -2.1% over prior year.
- The West is the largest \$ volume region, followed by the Midwest, Northeast, and South, respectively.
- 3 census regions are posting dollar sales that are less than prior year, the South Region is posting positive dollar sales, +0.3%

# Natural Channel: SS Dressing - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West, the most highly developed region for this subcategory, responsible for 50% of \$ volume, is in decline to prior year, -1.4%.
- The Midwest region, the 2<sup>nd</sup> largest market, is showing decline in dollars, -3.5%.
- The 2 remaining regions; Northeast is in decline to prior year dollars, -4.9%, while the South is experiencing slight dollar growth,+0.3%.

# Natural Channel: SS Dressing

## Top 10 Brands Northeast Census Region

Description	Dollars	Dollars %		Units %		Average		ARP	ARP, Yago	
		Dollars, Yago	Chg, Yago	NE DRESSI	Units, Yago	Chg, Yago	Avg % ACV			Items Selling
<b>SS DRESSING</b>	<b>\$11,854,109</b>	<b>\$12,469,845</b>	<b>-4.9</b>	<b>2,466,899</b>	<b>2,662,443</b>	<b>-7.3</b>			<b>\$4.81</b>	<b>\$4.68</b>
BRIANNAS	\$1,776,355	\$1,824,783	-2.7	394,008	405,334	-2.8	90.3	12.7	\$4.51	\$4.50
KENS STEAK HOUSE	\$1,645,419	\$1,779,295	-7.5	475,520	519,095	-8.4	61.4	22.5	\$3.46	\$3.43
PRIMAL KITCHEN	\$1,366,939	\$1,298,350	5.3	185,530	173,416	7.0	81.5	7.7	\$7.37	\$7.49
WISH-BONE	\$1,214,701	\$1,325,503	-8.4	369,450	423,116	-12.7	57.8	18.7	\$3.29	\$3.13
ANNIES HOMEGROWN	\$986,940	\$1,135,273	-13.1	190,197	218,704	-13.0	69.7	6.7	\$5.19	\$5.19
NEWMANS OWN	\$819,460	\$867,508	-5.5	151,598	161,288	-6.0	74.3	7.7	\$5.41	\$5.38
HIDDEN VALLEY RANCH	\$612,240	\$626,115	-2.2	120,370	124,131	-3.0	66.4	4	\$5.09	\$5.04
STONEWALL KITCHEN	\$504,637	\$503,455	0.2	54,802	55,378	-1.0	50.1	9.2	\$9.21	\$9.09
BRAGG	\$299,471	\$317,954	-5.8	41,491	44,044	-5.8	57.3	1.9	\$7.22	\$7.22
CARDINI	\$213,643	\$245,536	-13.0	42,093	48,591	-13.4	52.9	3	\$5.08	\$5.05

- SS Dressing, in the Natural Channel, is in decline -4.9% in \$ volume to prior year in the Northeast and is in further decline in unit volume,-7.3%
- Brianna's is the leading brand within this segment with \$1.8M in \$ volume, declining -2.7%, with a decrease in unit volume of -2.8%.
- Primal Kitchen brand is showing the highest increase in \$ volume, +5.3%, and a higher increase in unit volume at +7.0%.
- Annie's Homegrown and Cardini brands are showing highest dollar volume decline at -13.1% and -13.0%, respectively

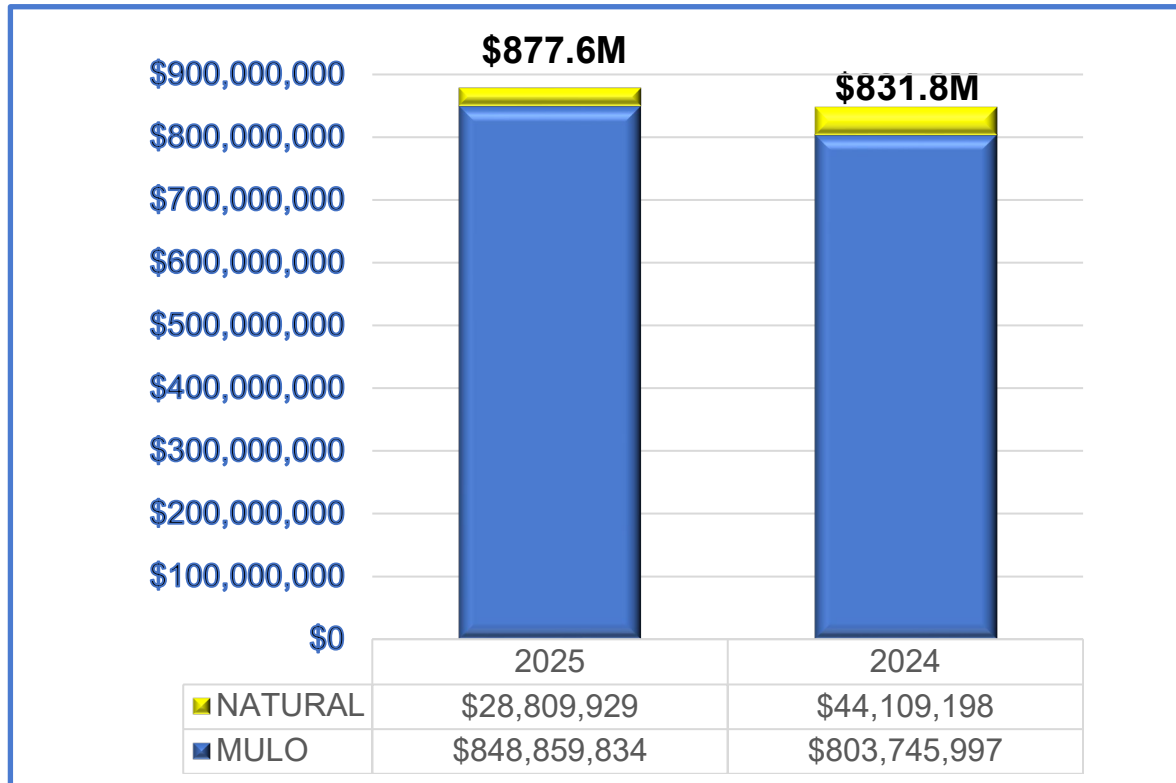
# HOT SAUCE

## Sub-category Performance

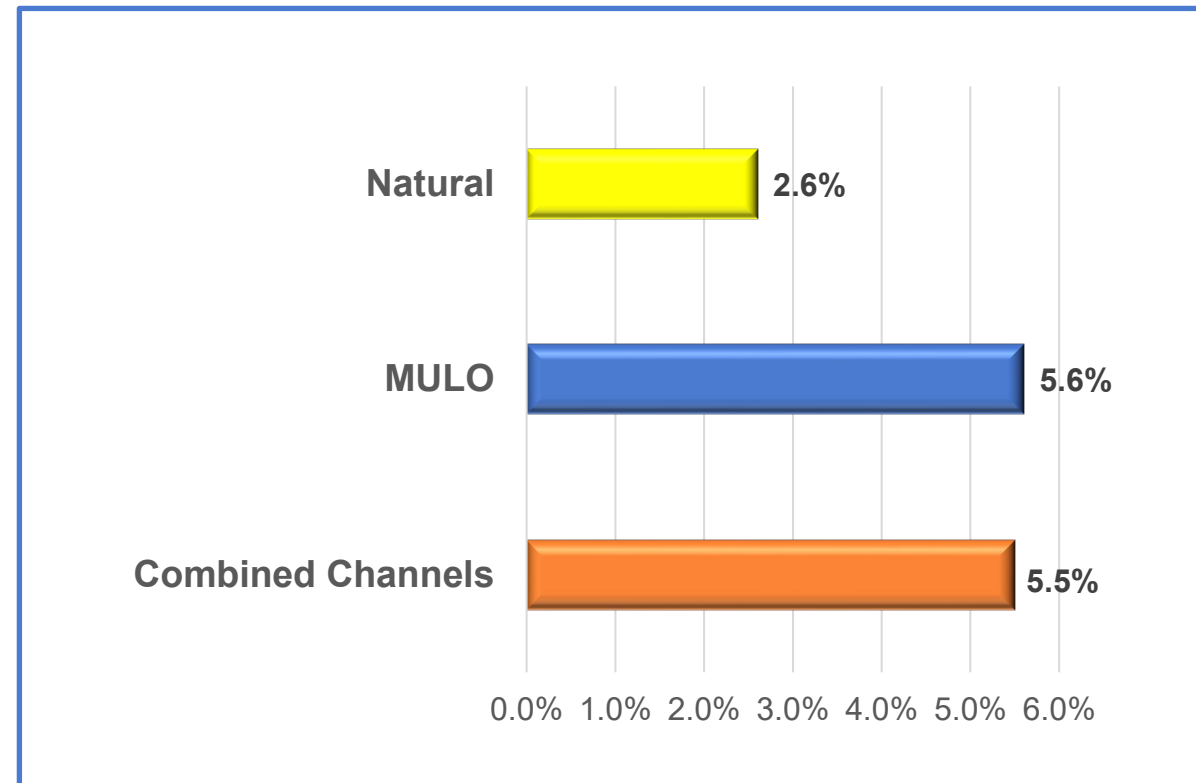
*SPINS Satori - 52 Weeks Ending April 20, 2025*

# Total US SS Hot Sauce Subcategory

Total US Dollars



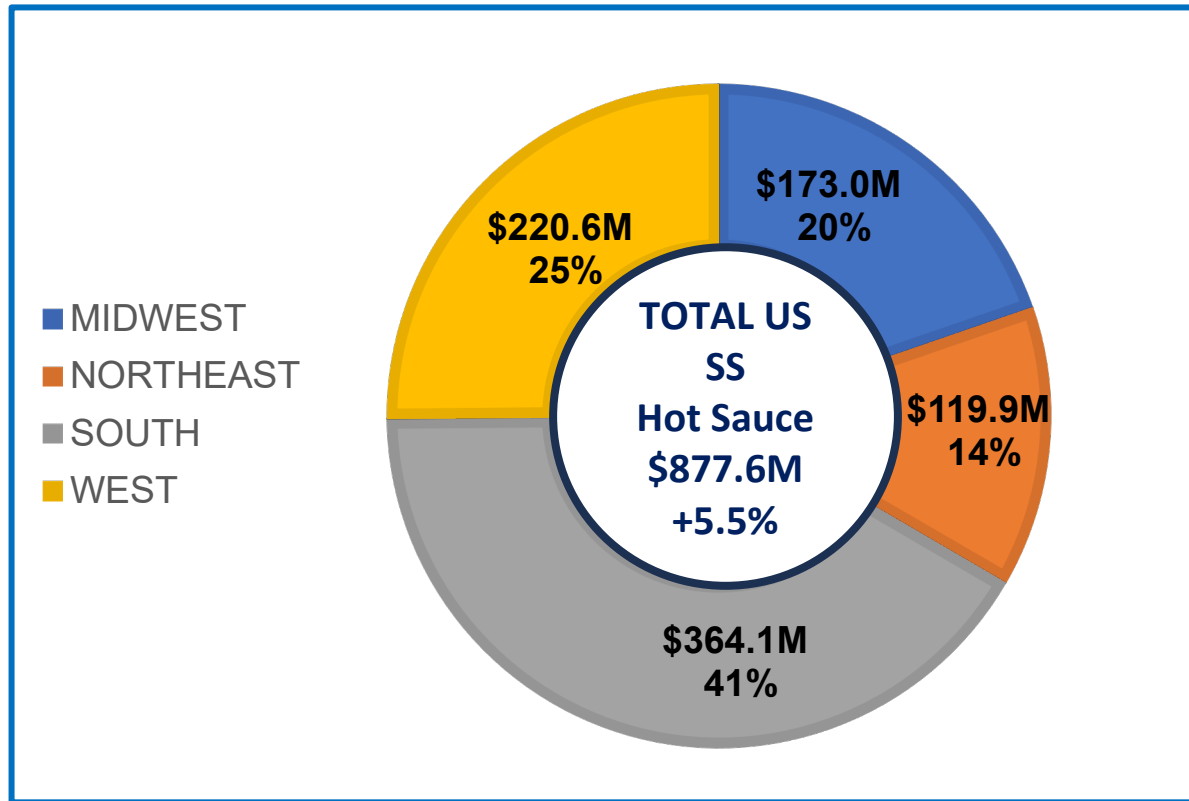
% Dollar Change vs Year Ago



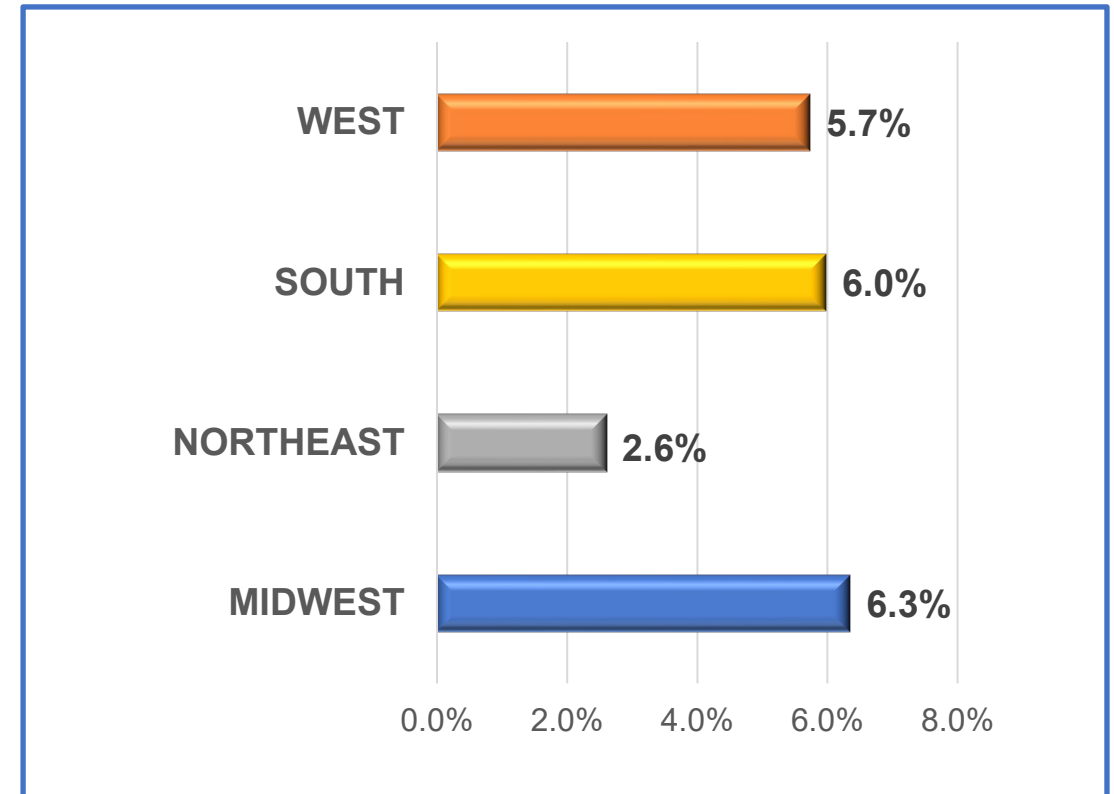
- Total US Hot Sauce is a \$877.6M subcategory with \$ growth to prior year of +5.5%.
- Sales dollars were positive to prior year in the Natural Channel at +2.6% and MULO at +5.6%.

# Total US SS Hot Sauce - By Region

Total Dollars and % Category Share by Region



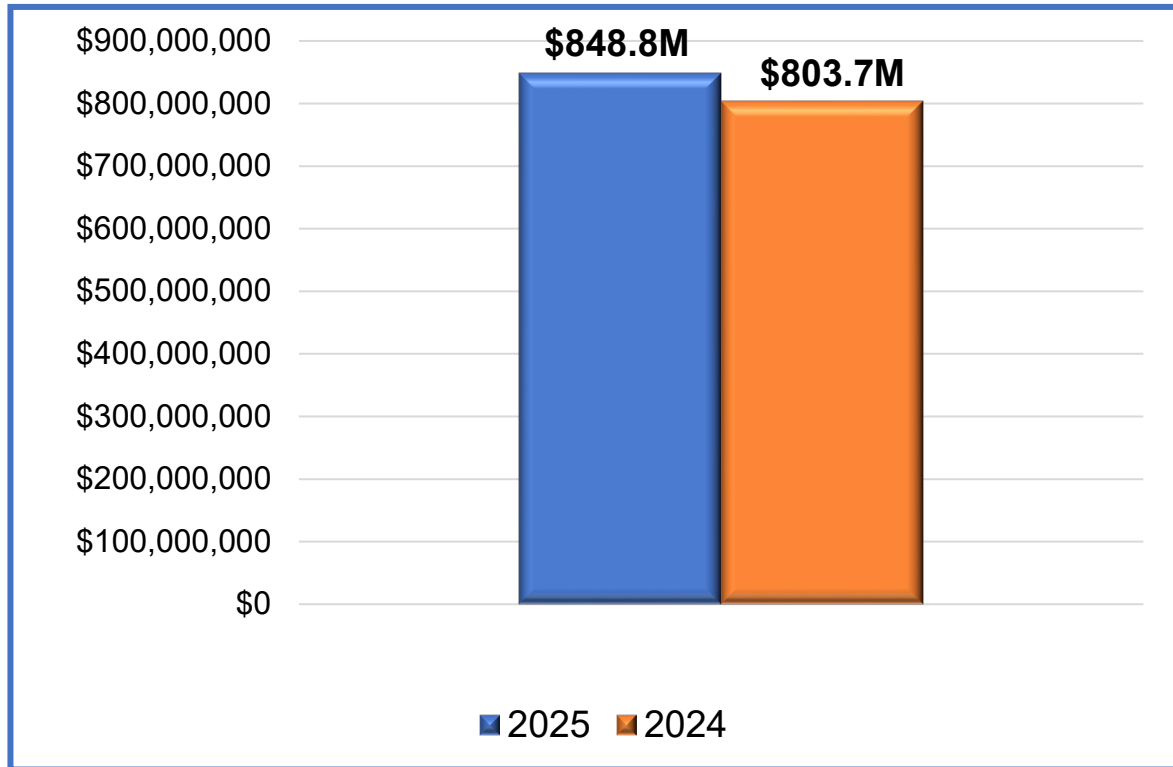
% Dollar Change vs Year Ago



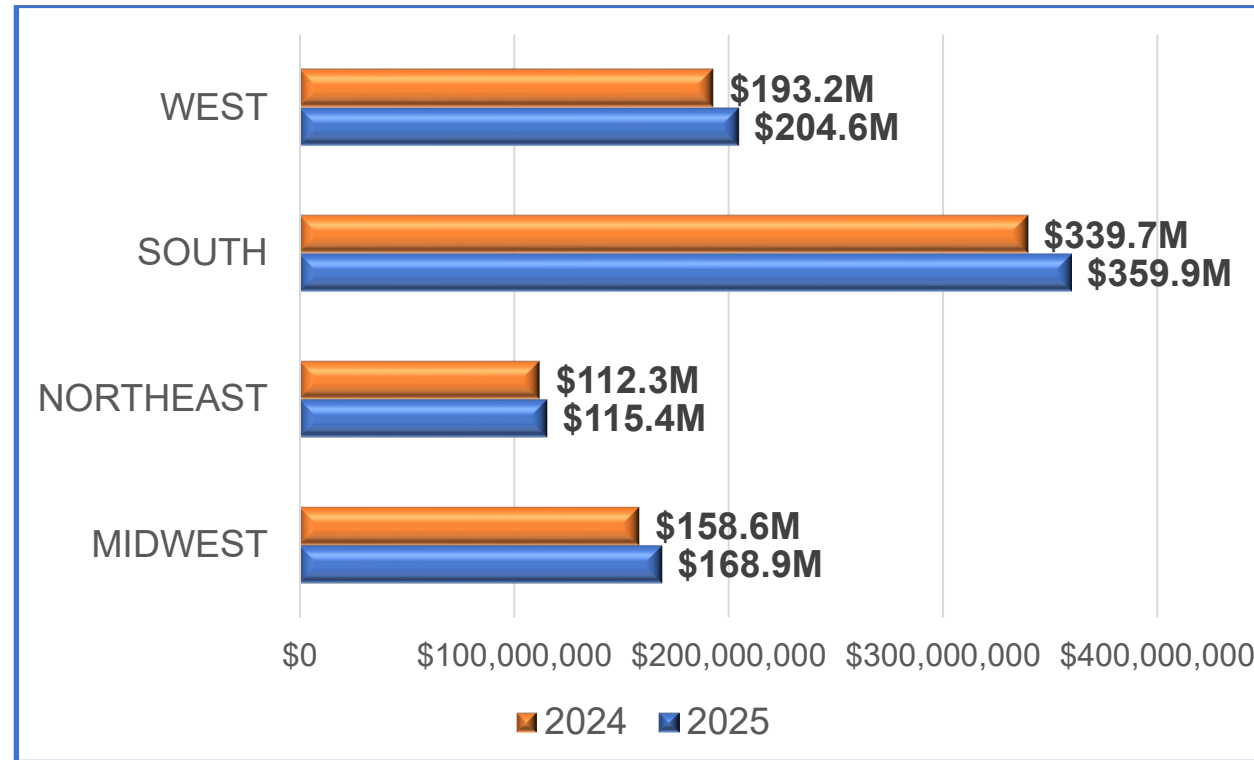
- The SS Hot Sauce subcategory has experienced dollar growth of +5.5% over prior year and is responsible for \$877.6M.
- The South is the most highly developed region for this subcategory, responsible for 41% of \$ volume, with growth at +6.0%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 59% of \$ volume, with \$ growth of +5.7%, +2.6% and +6.3%, respectively.

# MULO: SS Hot Sauce Subcategory

MULO Total US Dollars



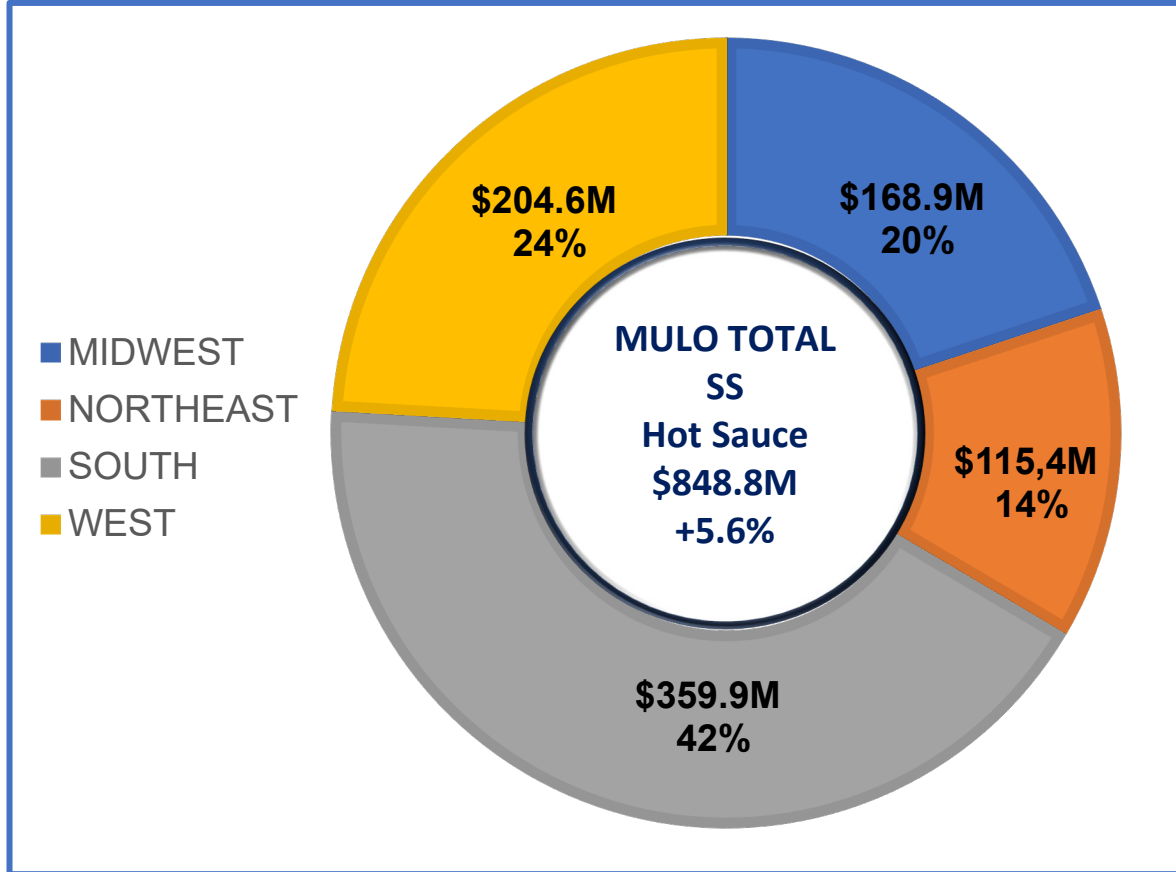
Dollar Change vs Year Ago



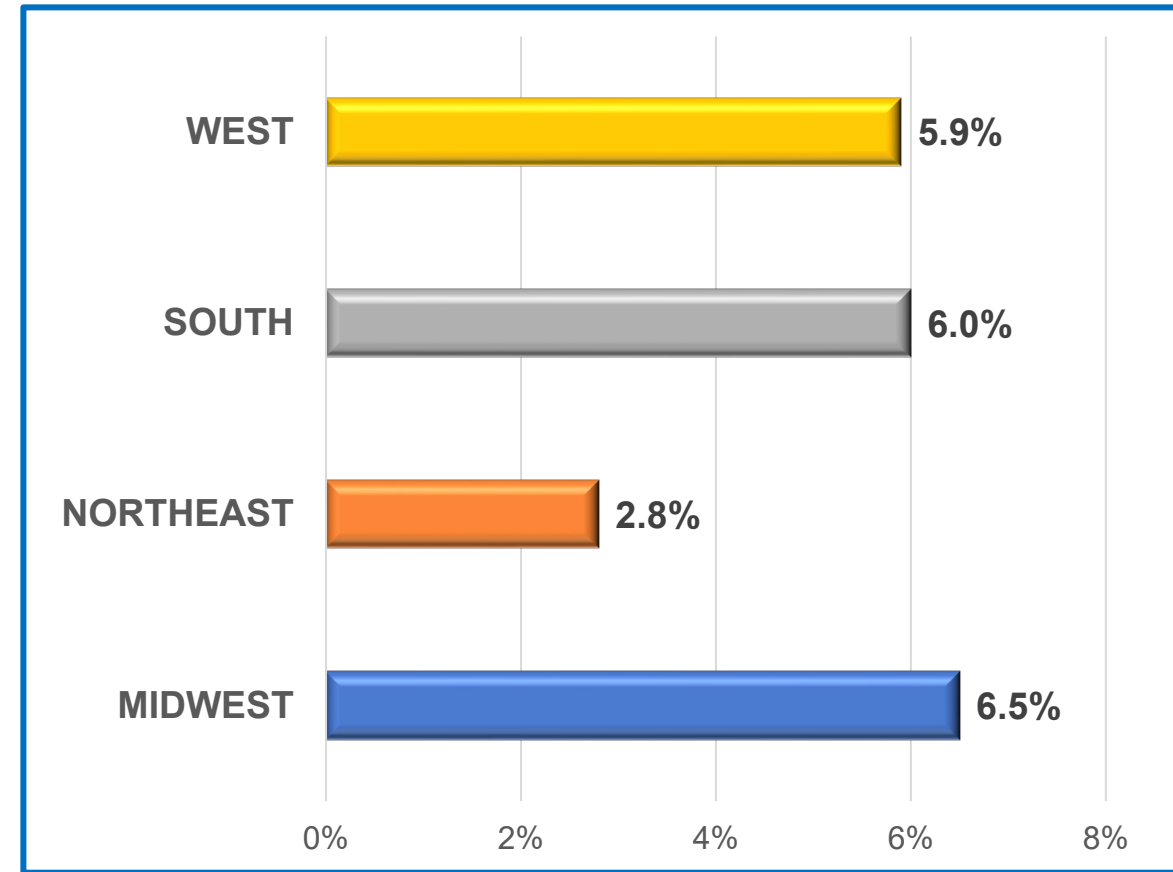
- Total US MULO \$ volume for SS Hot Sauce is \$848.8M and grew +5.6% over prior year.
- The South is the largest \$ volume region, followed by, West, Midwest and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

# MULO: SS Hot Sauce Subcategory - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South is the most highly developed region for this sub-category, responsible for 42% of \$ volume with growth of +6.0%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 58% of \$ volume with respective growth of +5.9%, +2.8%, and +6.5%.

## MULO: SS Hot Sauce Top 10 Brands Northeast Census Region

Description	Dollars %			Units %			Avg % ACV	Average		ARP, Yago
	Dollars	Dollars, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago		Items Selling	ARP	
<b>SS HOT SAUCE</b>	<b>\$115,404,976</b>	<b>\$112,257,412</b>	<b>2.8</b>	<b>32,289,037</b>	<b>30,923,229</b>	<b>4.4</b>			<b>\$3.57</b>	<b>\$3.63</b>
FRANKS RED HOT	\$40,838,221	\$40,456,995	0.9	9,254,480	8,941,546	3.5	90.4	5.8	\$4.41	\$4.52
CHOLULA	\$16,603,372	\$16,118,572	3.0	3,158,860	3,127,350	1.0	84	4.8	\$5.26	\$5.15
TABASCO	\$10,983,938	\$11,186,487	-1.8	3,189,531	3,222,756	-1.0	85.1	4.9	\$3.44	\$3.47
PRIVATE LABEL	\$5,043,330	\$5,034,900	0.2	2,310,335	2,246,506	2.8	52.3	1.8	\$2.18	\$2.24
TACO BELL HOME ORIGINALS	\$5,015,439	\$3,311,261	51.5	2,427,474	1,734,247	40.0	57	3.1	\$2.07	\$1.91
EL YUCATECO	\$2,392,938	\$2,210,521	8.3	808,968	766,266	5.6	31.6	3.2	\$2.96	\$2.88
MELINDAS	\$2,339,993	\$2,193,400	6.7	1,281,992	1,197,032	7.1	48.3	5	\$1.83	\$1.83
CRYSTAL SAUCES	\$2,123,110	\$1,974,073	7.5	903,114	885,559	2.0	29.3	1.7	\$2.35	\$2.23
TEXAS PETE	\$2,031,026	\$2,055,494	-1.2	779,672	819,481	-4.9	46.5	1.8	\$2.60	\$2.51
TRUFF	\$1,712,382	\$1,709,953	0.1	126,960	125,528	1.1	25.7	1.6	\$13.49	\$13.62

- The MULO SS Hot Sauce subcategory represents \$115.4M in \$ volume, at +2.8% over prior year in the Northeast, and is also positive in unit volume, at +4.4%.
- Franks Red Hot is the #1 brand in the subcategory with \$ volume of \$40.8M at 0.9% growth in \$ volume and +3.5% increase in unit volume.
- Taco Bell, the #5 brand, has the highest dollar growth in the subcategory at +51.5% and unit growth of +40.0% .
- Private Label ranks 4<sup>th</sup> in the Northeast and is showing slight dollar growth +0.2%and unit growth of +2.8%.

# MULO: SS Hot Sauce

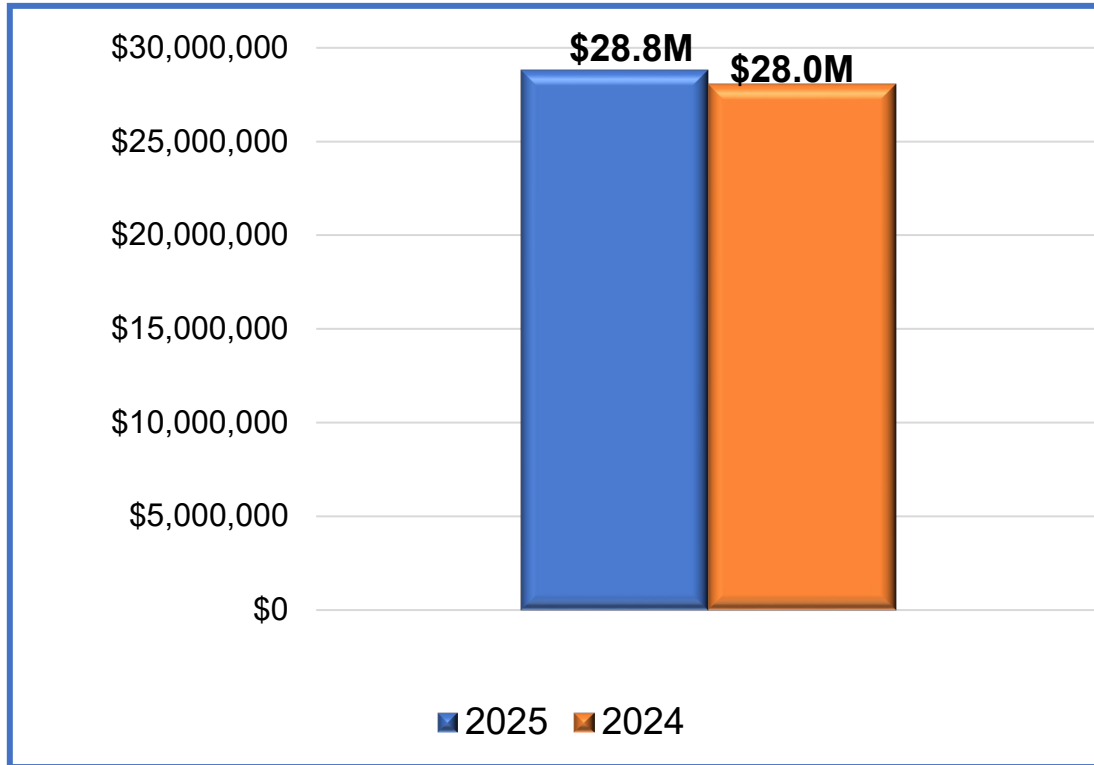
## Top Markets Northeast Census Region

Geography	Dollars			Units			Units %		TDP, ARP	
	Dollars	Dollars, Yago	% Chg, Yago	Units	Units, Yago	Chg, Yago	TDP	TDP, Yago	ARP	ARP, Yago
NEW YORK, NY - MULO	\$31,703,591	\$30,725,041	3.2	8,565,252	8,362,317	2.4	\$4,236	\$4,077	\$3.70	\$3.67
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$20,075,990	\$19,450,258	3.2	5,759,530	5,545,566	3.9	\$4,262	\$4,327	\$3.49	\$3.51
PHILADELPHIA, PA - MULO	\$14,689,974	\$13,938,429	5.4	4,285,116	4,073,667	5.2	\$4,580	\$4,551	\$3.43	\$3.42
BOSTON, MA - MULO	\$10,933,380	\$10,709,438	2.1	2,831,271	2,725,748	3.9	\$3,686	\$3,484	\$3.86	\$3.93
HARRISBURG/SCRANTON, PA - MULO	\$9,285,087	\$8,743,353	6.2	2,862,585	2,648,739	8.1	\$4,446	\$4,435	\$3.24	\$3.30
BUFFALO/ROCHESTER, NY - MULO	\$8,473,770	\$8,440,910	0.4	2,272,883	2,186,286	4.0	\$4,200	\$4,203	\$3.73	\$3.86
NEW ENGLAND - MULO	\$7,704,949	\$7,524,103	2.4	2,164,072	2,085,018	3.8	\$4,450	\$4,493	\$3.56	\$3.61
PITTSBURGH, PA - MULO	\$7,283,077	\$7,271,855	0.2	2,002,969	1,915,179	4.6	\$4,074	\$4,128	\$3.64	\$3.80
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$6,286,030	\$6,183,240	1.7	1,810,343	1,696,019	6.7	\$3,840	\$3,670	\$3.47	\$3.65
SYRACUSE, NY - MULO	\$3,252,965	\$3,216,459	1.1	945,980	907,792	4.2	\$4,603	\$4,625	\$3.44	\$3.54
ALBANY, NY - MULO	\$2,887,533	\$2,798,508	3.2	815,588	782,584	4.2	\$5,117	\$5,056	\$3.54	\$3.58
PROVIDENCE, RI - MULO	\$1,839,301	\$1,803,596	2.0	505,196	476,054	6.1	\$3,709	\$3,561	\$3.64	\$3.79

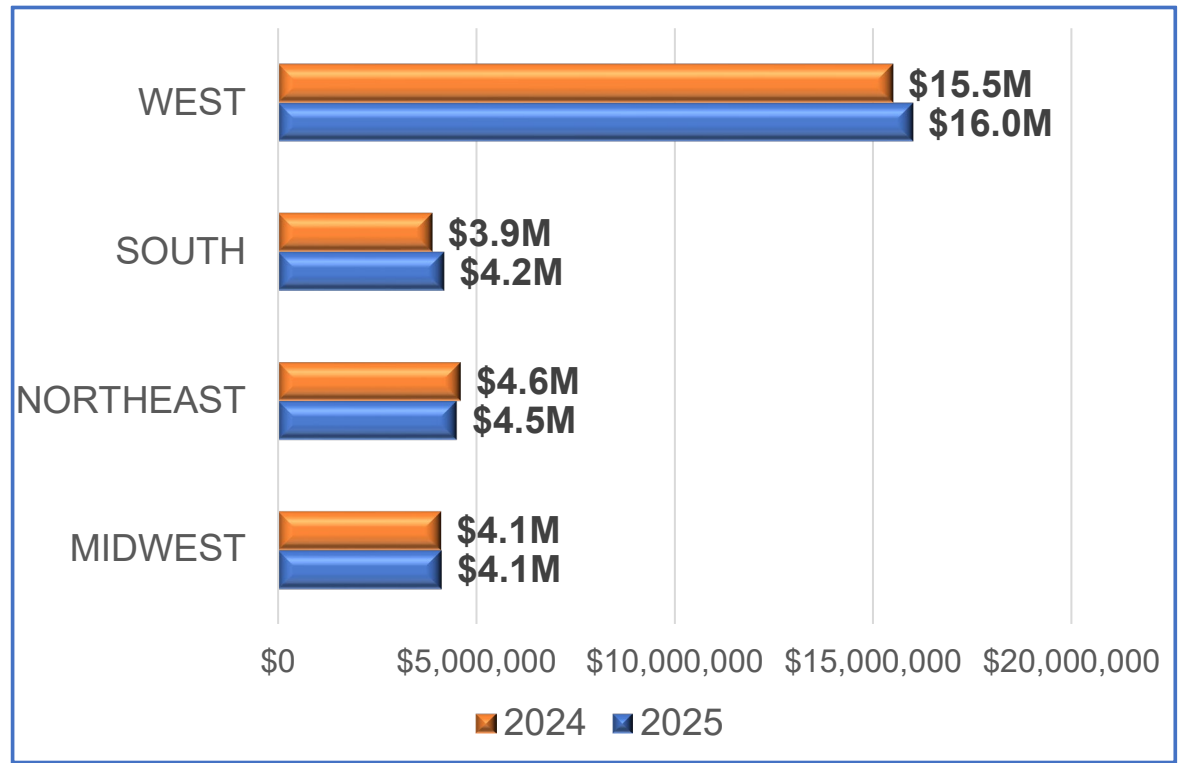
- New York is the largest market for Hot Sauce, posting positive \$ sales growth of +3.2% and is also showing unit growth of +2.4%.
- New England, the 7th largest market responsible for \$7.7M in sales, is showing dollar growth of +2.4% and unit growth of +3.8%.
- Harrisburg/Scranton, the 5<sup>th</sup> largest market, is achieving the fastest growth on both a dollar and unit basis, at +6.2% and +8.1% respectively.
- Interestingly, all markets depicted are positive in dollar and unit growth.

# Natural Channel: SS Hot Sauce Subcategory

Natural Channel Total US Dollars



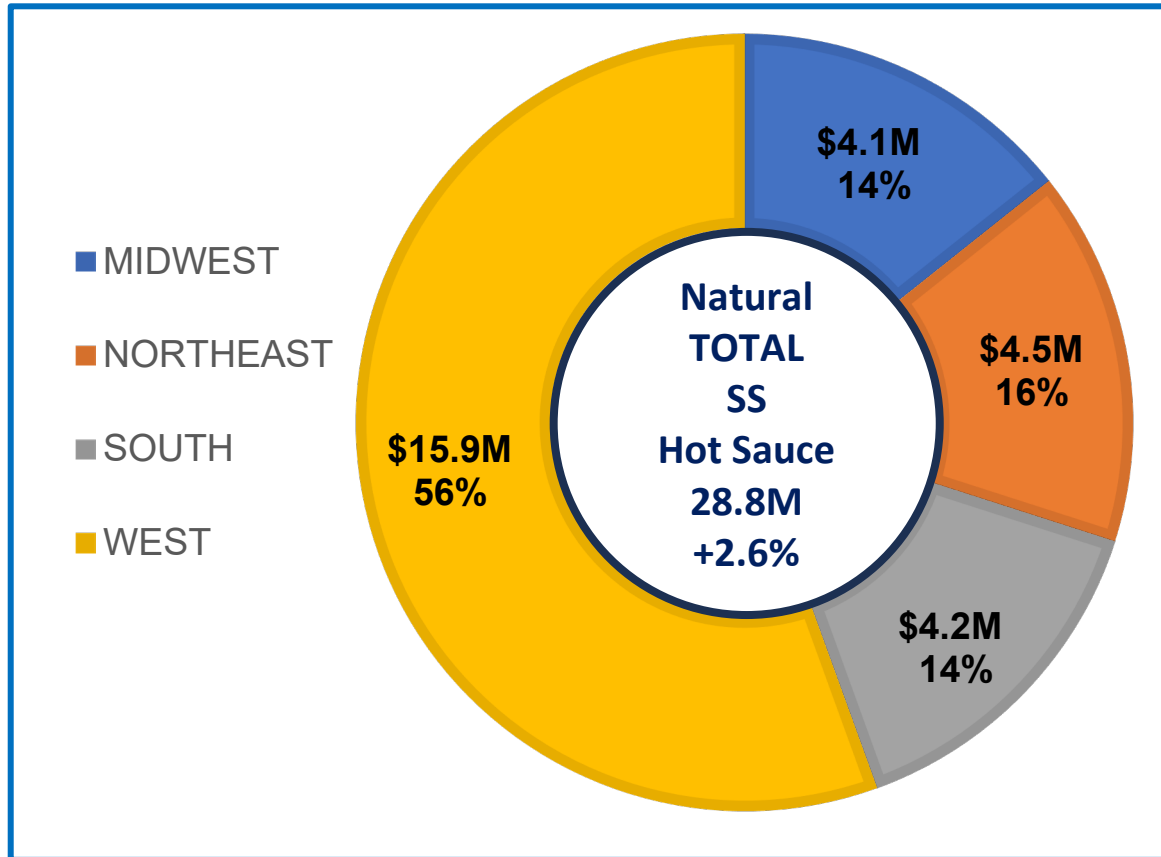
Dollar Change vs Year Ago



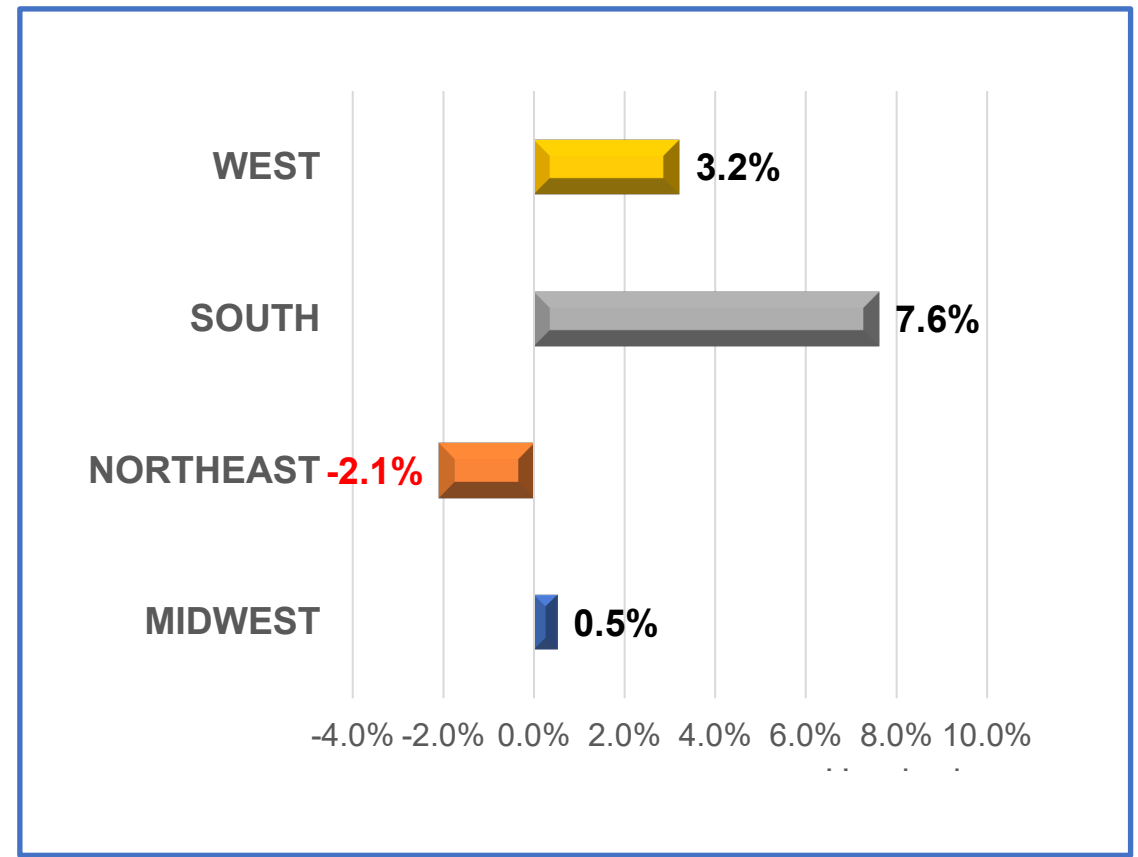
- Total Natural \$ volume for the SS Hot Sauce subcategory is \$28.8M and grew +2.6% over prior year.
- The West is the largest \$ volume region, followed by the Northeast, South, and Midwest, respectively.
- All census regions, with exception of the Northeast -2.1% and Total US, are posting sales that are greater than prior year.

# Natural Channel: SS Hot Sauce Subcategory - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West is the most highly developed region for this subcategory, responsible for 56% of \$ volume with dollar growth +3.2% to prior year.
- The South and Midwest are showing dollar volume growth of +7.6% and +0.5%, respectively.
- The Northeast region is in dollar volume decline, -2.1%

## Natural Channel: SS Hot Sauce Top 10 Brands Northeast Census Region

Brand	Dollars	Dollars %		Units	Units %		Average		ARP	ARP, Yago
		Dollars, Yago	Chg, Yago		Units, Yago	Chg, Yago	Avg % ACV	Items Selling		
<b>SS HOT SAUCE</b>	<b>\$4,504,245</b>	<b>\$4,600,363</b>	<b>-2.1</b>	<b>816,527</b>	<b>845,914</b>	<b>-3.5</b>			<b>\$5.52</b>	<b>\$5.44</b>
CHOLULA	\$911,741	\$941,501	-3.2	164,219	169,824	-3.3	90.3	3.8	\$5.55	\$5.54
FRANKS RED HOT	\$607,858	\$634,889	-4.3	125,968	130,500	-3.5	72.2	2.8	\$4.83	\$4.87
YELLOWBIRD SAUCE	\$414,343	\$419,826	-1.3	56,356	58,537	-3.7	58	3.1	\$7.35	\$7.17
TABASCO	\$323,768	\$339,002	-4.5	87,021	93,216	-6.6	74.4	3.3	\$3.72	\$3.64
TRUFF	\$219,688	\$228,938	-4.0	14,129	14,411	-2.0	36.1	1.8	\$15.55	\$15.89
MINA	\$210,406	\$209,292	0.5	31,022	30,514	1.7	53.6	1.8	\$6.78	\$6.86
MOTHER IN LAWS KIMCHI	\$163,463	\$156,140	4.7	18,520	17,713	4.6	30.5	1.3	\$8.83	\$8.82
SIETE	\$137,491	\$113,166	21.5	22,891	19,864	15.2	35.3	2.2	\$6.01	\$5.70
MELINDAS	\$107,053	\$122,664	-12.7	25,375	28,957	-12.4	39.3	2.4	\$4.22	\$4.24
SUGAR BOBS	\$79,402	\$78,699	0.9	6,069	6,179	-1.8	13	1.5	\$13.08	\$12.74

- The Natural Channel SS Hot Sauce subcategory is in \$ volume decline, at -2.1% over prior year in the Northeast, and is also in unit volume decline, -3.5%.
- Cholula, the #1 brand in the subcategory with \$911.7M in \$ volume, is in decline -3.2% over prior year in dollars, and -3.3% in unit volume.
- Siete, the #8 brand, has the distinction of being the highest growth brand with high growth in both dollars and units, +21.5% and +15.2%.

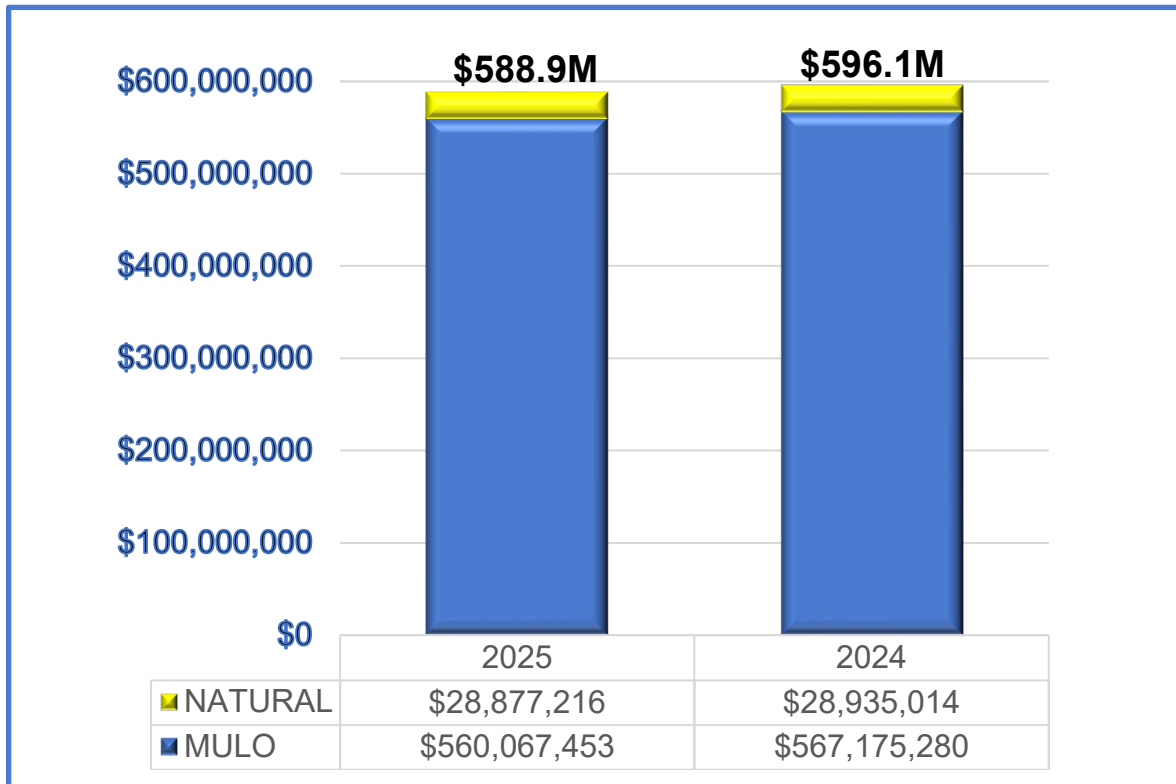
# SS MUSTARD

## Sub-category Performance

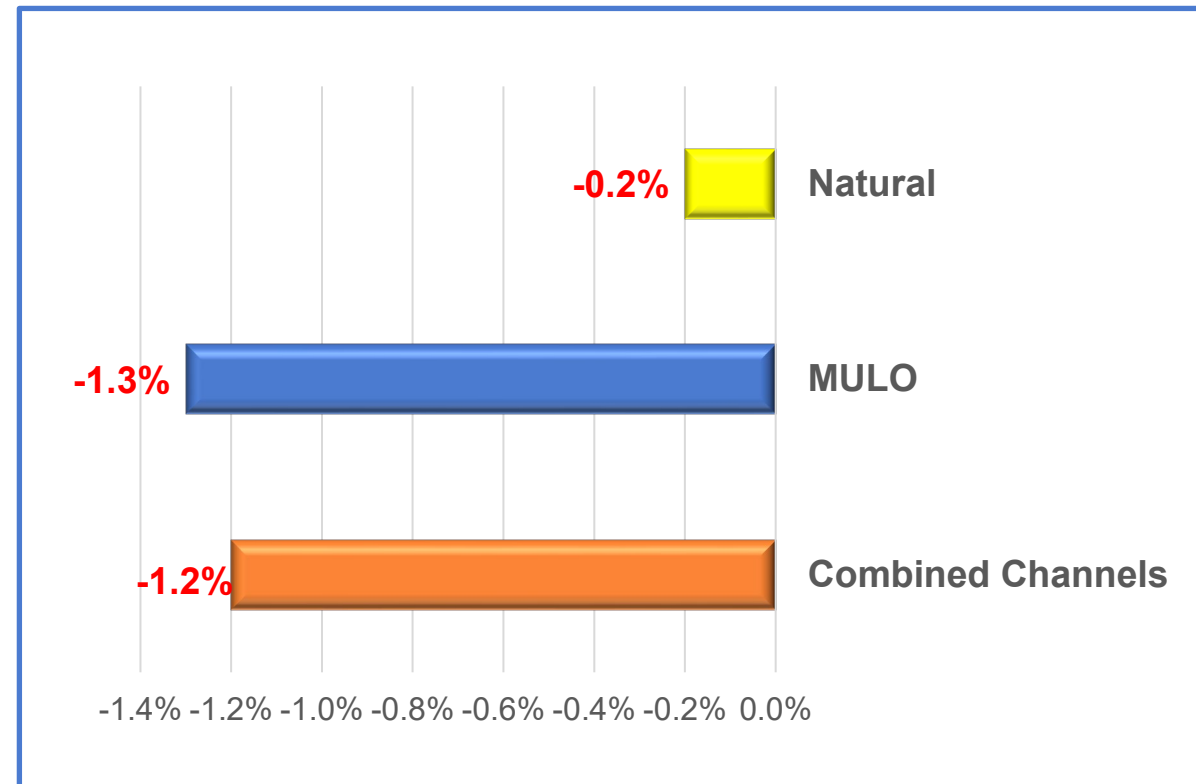
*SPINS Satori - 52 Weeks Ending April 20, 2025*

# Total US SS Mustard Subcategory

Total US Dollars



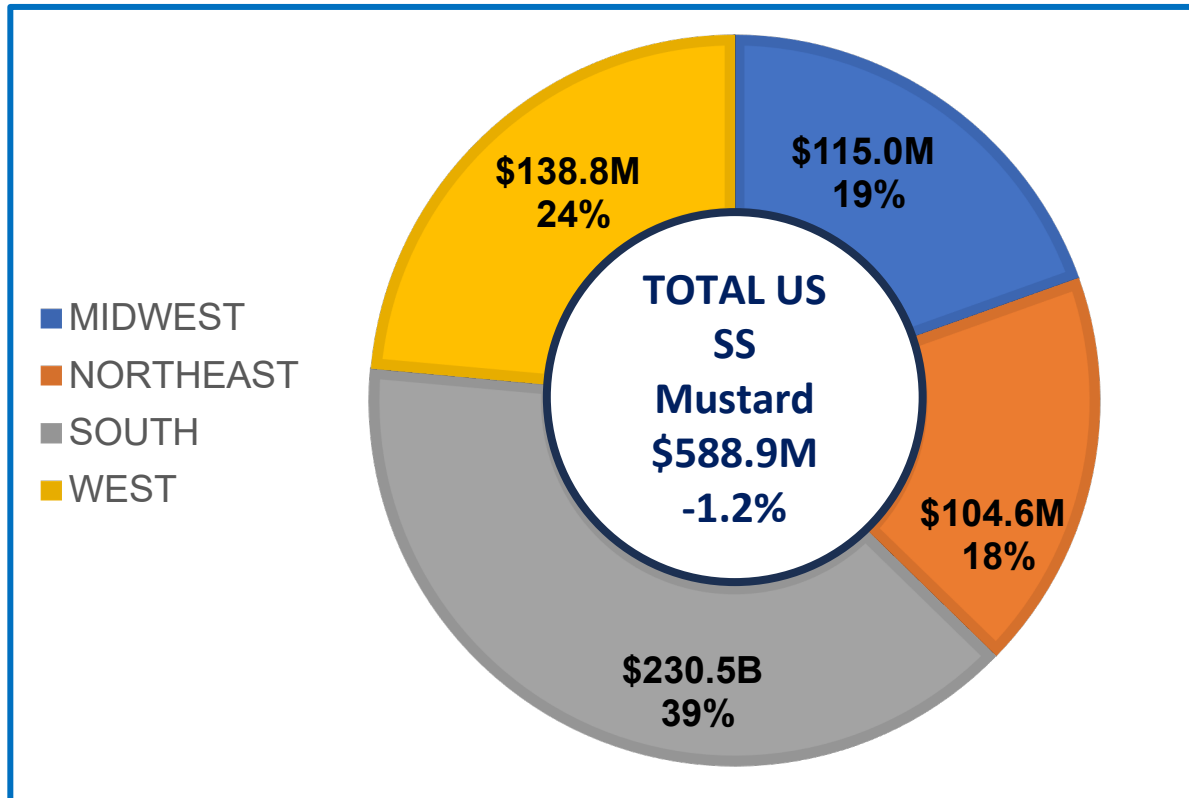
% Dollar Change vs Year Ago



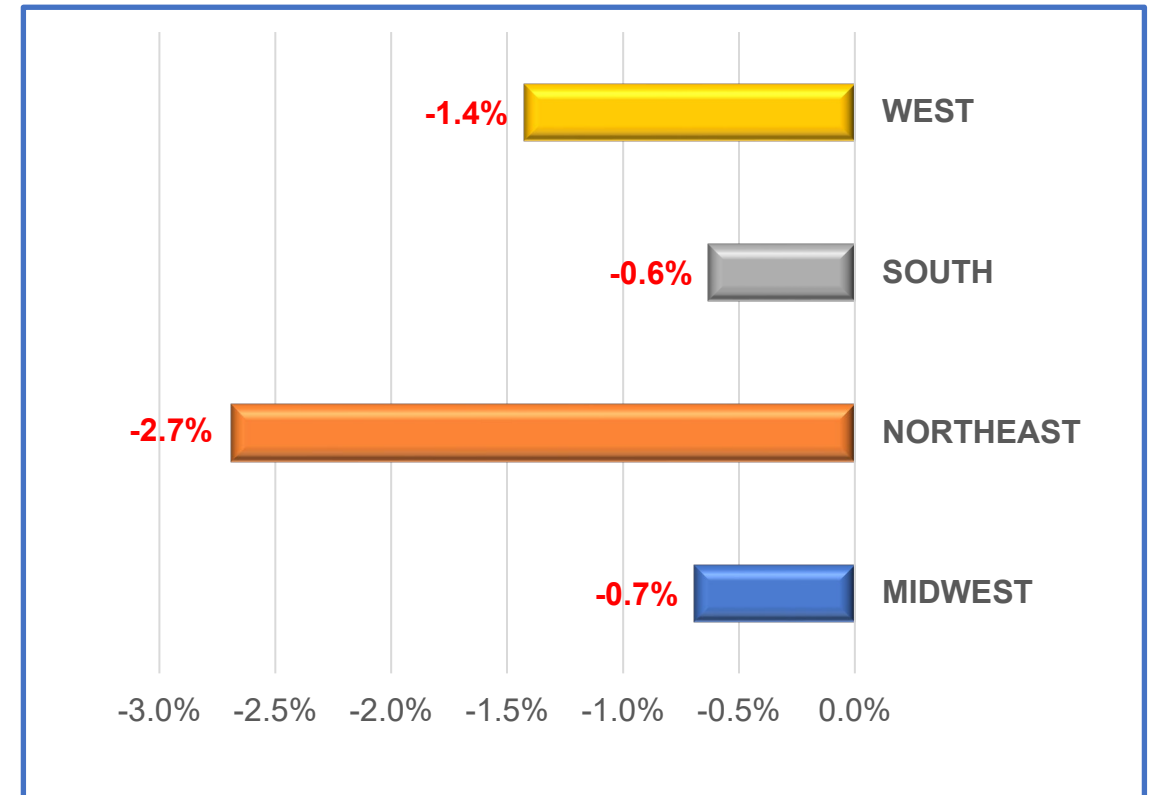
- Total US SS Mustard is a \$588.9M Category and is in decline to prior year by -1.2%.
- Sales dollars were in decline in the Natural Channel at -0.2% and MULO at -1.3%.

# Total US - SS Mustard - By Region

Total Dollars and % Category Share by Region



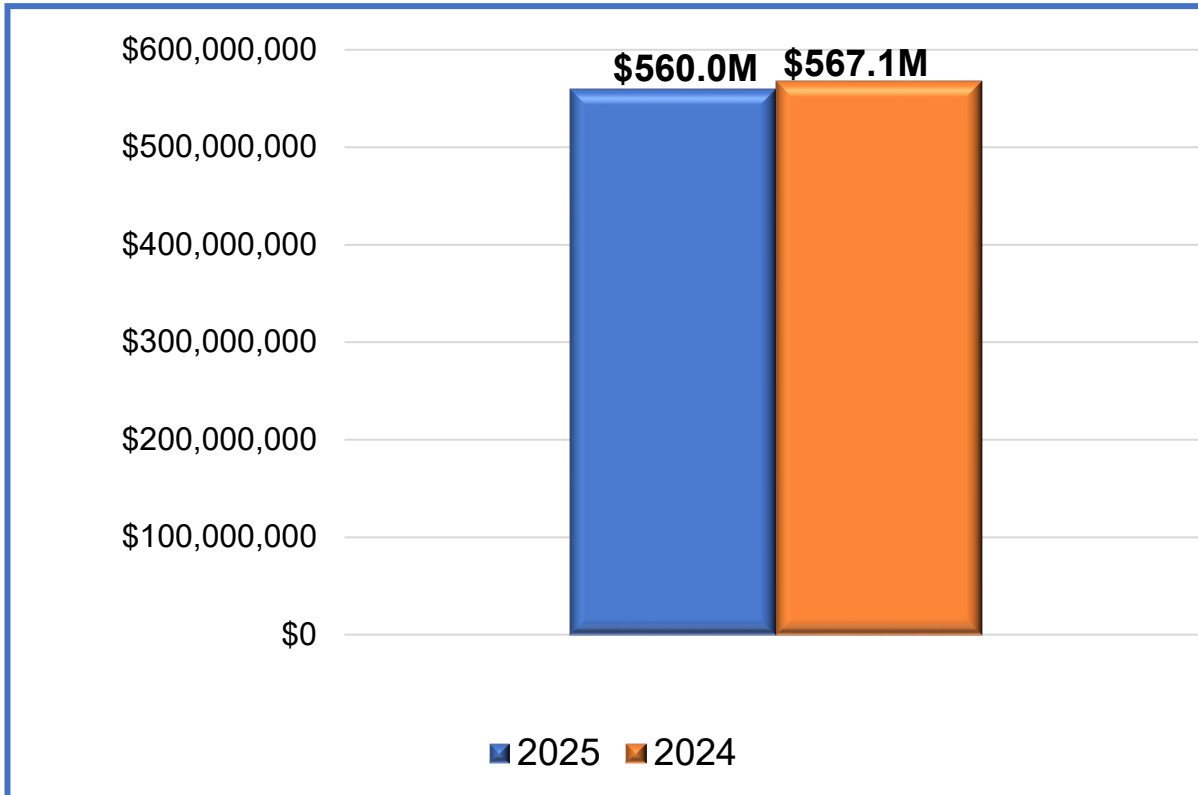
% Dollar Change vs Year Ago



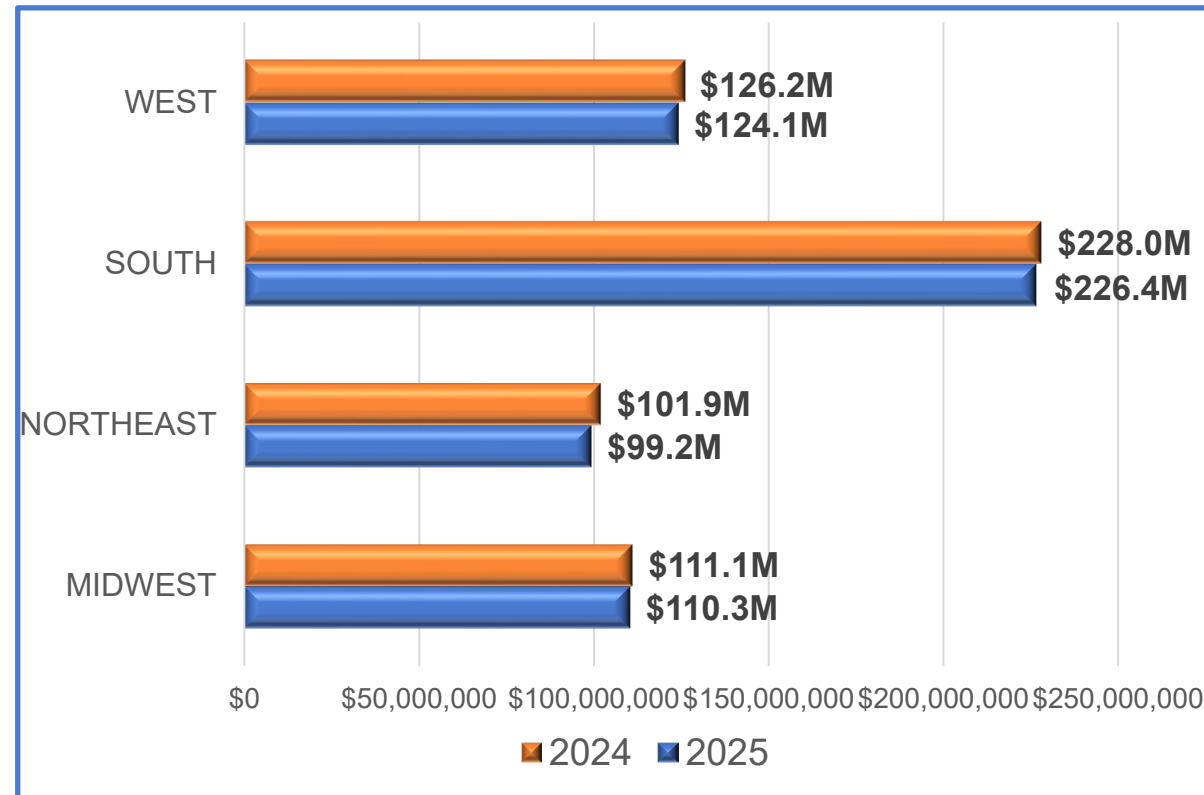
- The South is the most highly developed region for this sub-category, responsible for 39% of \$ volume with a decline at -0.6%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining \$ volume with respective declines of -1.4%, -2.7% and -0.7%.

# Total US MULO: SS Mustard Subcategory

MULO Total US Dollars



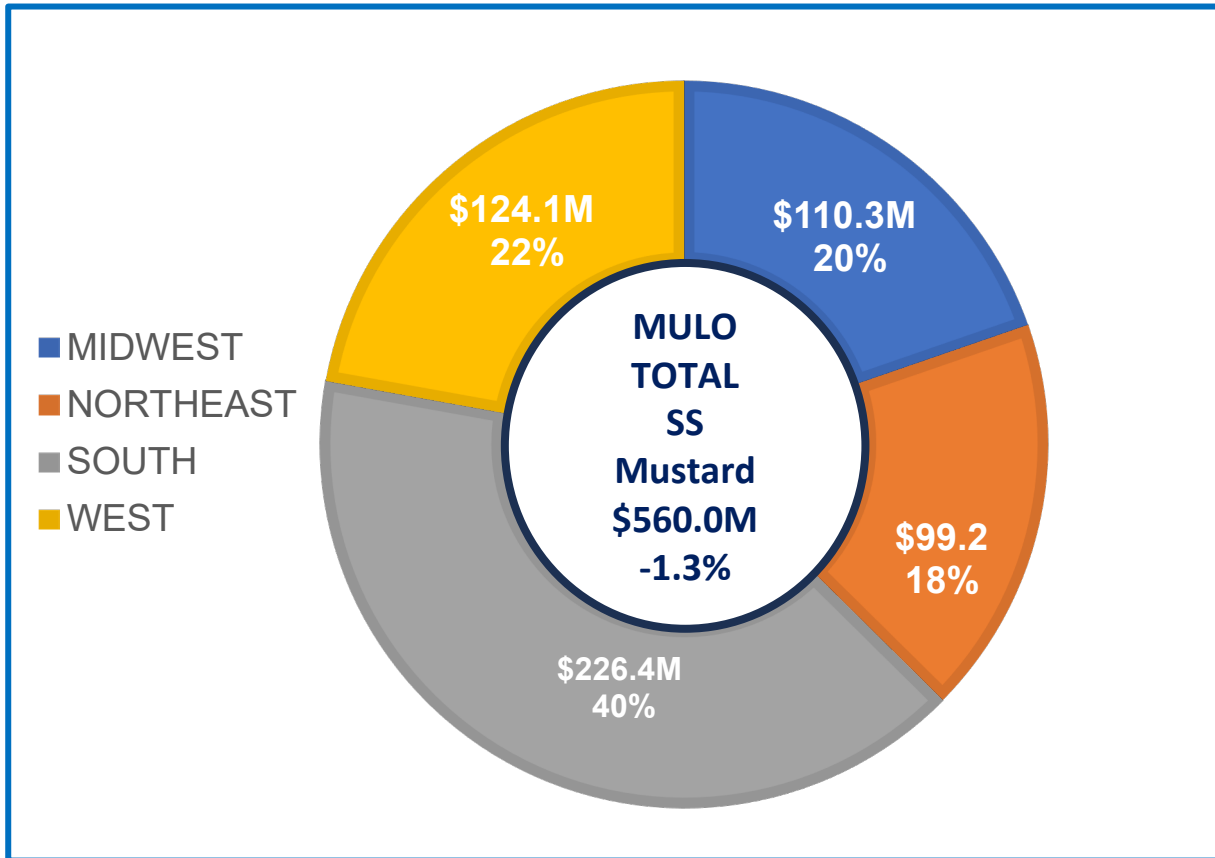
Dollar Change vs Year Ago



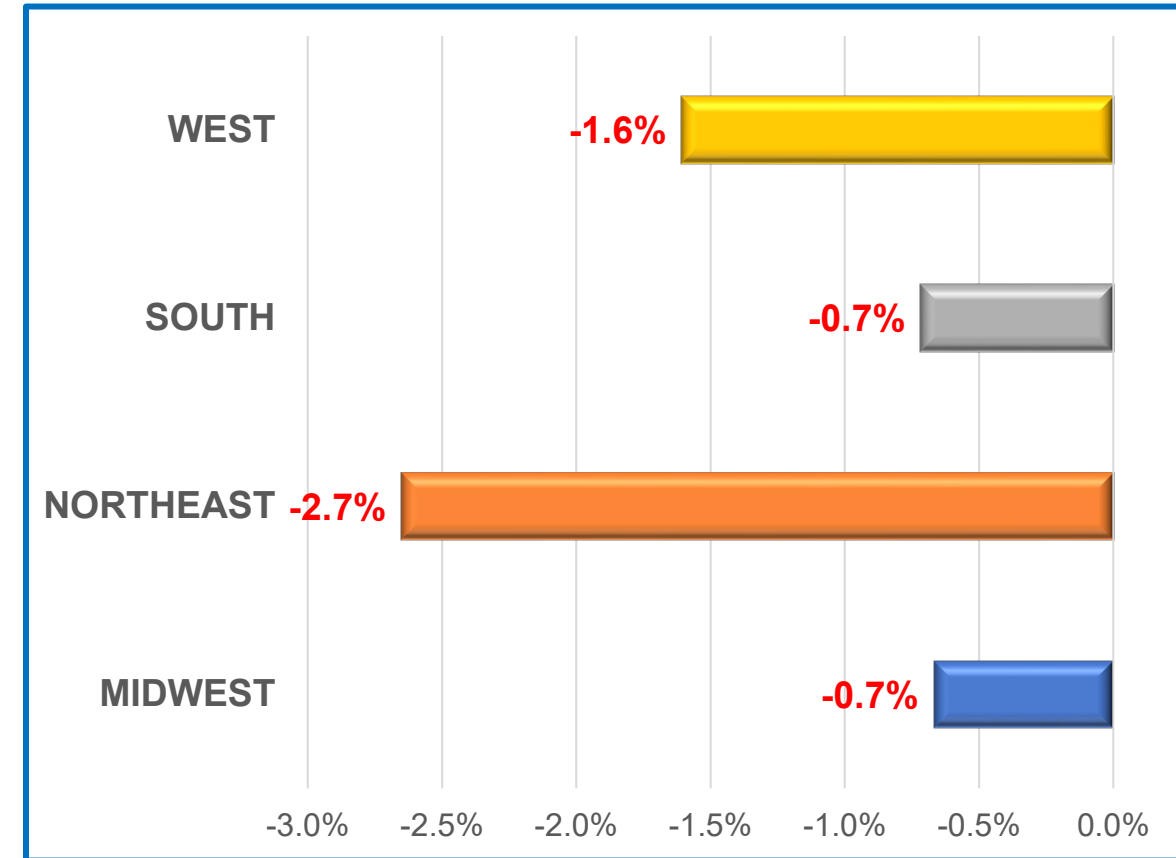
- Total US MULO dollar volume SS Mustard is \$560.0M and is in decline in dollar volume to prior year by -1.3%.
- The South is the largest dollar volume region, followed by West, Midwest, and Northeast, respectively.
- All 4 census regions and Total US are posting negative dollar sales to prior year.

# MULO: SS Mustard Subcategory

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South is the most highly developed region for this subcategory, responsible for 40% of \$ volume with decline of -0.7%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 60%; all are showing dollar decline to prior year.

# MULO: SS Mustard

## Top 10 Brands Northeast Census Region

Description	Dollars			Units %			Average			
	Dollars	Dollars, Yago	% Chg, Yago	Units	Units, Yago	Chg, Yago	Avg % ACV	Items Selling	ARP	ARP, Yago
<b>SS MUSTARD</b>	<b>\$99,240,462</b>	<b>\$101,943,059</b>	<b>-2.7</b>	<b>42,063,859</b>	<b>42,390,387</b>	<b>-0.8</b>			<b>\$2.36</b>	<b>\$2.40</b>
FRENCHS	\$23,944,576	\$25,063,112	-4.5	9,309,122	9,265,983	0.5	89.6	6.9	\$2.57	\$2.70
PRIVATE LABEL	\$22,533,682	\$22,844,156	-1.4	15,912,820	16,161,480	-1.5	83.4	8.6	\$1.42	\$1.41
GREY POUPON	\$12,778,686	\$12,605,537	1.4	2,807,009	2,786,265	0.7	78.9	3.1	\$4.55	\$4.52
GULDENS	\$8,586,307	\$9,267,554	-7.4	4,282,299	4,495,115	-4.7	76.9	2.5	\$2.01	\$2.06
HEINZ	\$4,365,517	\$4,812,068	-9.3	1,644,440	1,807,864	-9.0	55.1	2.1	\$2.65	\$2.66
MAILLE	\$4,309,163	\$4,215,496	2.2	808,979	845,140	-4.3	54.3	3.3	\$5.33	\$4.99
PRIVATE LABEL ORGANIC	\$2,144,326	\$2,169,232	-1.1	749,148	755,805	-0.9	48.4	2.2	\$2.86	\$2.87
INGLEHOFFER	\$1,836,852	\$1,861,627	-1.3	529,836	538,838	-1.7	53.9	2.4	\$3.47	\$3.45
BOARS HEAD	\$1,777,009	\$2,055,078	-13.5	378,914	435,501	-13.0	23.2	3.1	\$4.69	\$4.72
MIKES	\$1,560,384	\$648,136	140.7	1,109,398	523,511	111.9	28.1	4.3	\$1.41	\$1.24

- SS Mustard in Northeast MULO, is in decline -2.7 % in \$ volume over prior year and is also in decline in unit volume, at -0.8%.
- French's is the leading brand within this subcategory in the Northeast, with \$23.9M in \$ volume, declining -4.5%, but is growing slightly in unit volume at +0.5%.
- Private Label, ranking 2<sup>nd</sup> in this subcategory in overall \$ volume, is registering -1.4% decline and is showing a -1.5% decrease in unit volume, year over year.
- Mike's is the fastest growing brand of the Top 10 brands in the Northeast with +140.7% in dollar volume and +111.9% in units.

# MULO: Mustard

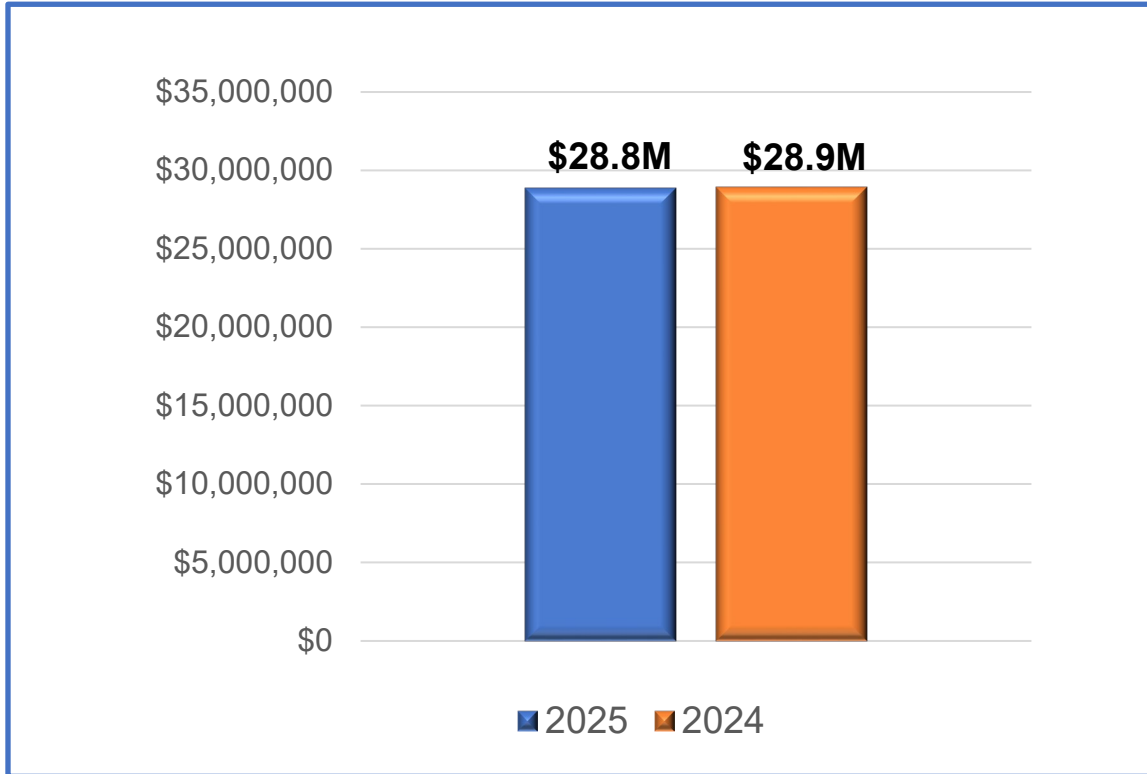
## Top Markets Northeast Census Region

Geography	Dollars			Units		Units %		TDP, Yago	ARP, Yago	ARP, Yago
	Dollars	Dollars, Yago	% Chg, Yago	Units	Units, Yago	Chg, Yago	TDP			
NEW YORK, NY - MULO	\$26,929,222	\$27,760,580	-3.0	10,426,203	10,550,215	-1.2	\$3,860.2	\$3,983.0	\$2.58	\$2.63
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$16,238,625	\$16,728,861	-2.9	6,710,569	6,779,427	-1.0	\$3,451.1	\$3,768.7	\$2.42	\$2.47
PHILADELPHIA, PA - MULO	\$12,477,357	\$12,825,757	-2.7	5,624,105	5,726,939	-1.8	\$3,993.9	\$4,117.2	\$2.22	\$2.24
BOSTON, MA - MULO	\$10,164,236	\$10,640,524	-4.5	4,008,312	4,060,330	-1.3	\$3,825.8	\$3,998.8	\$2.54	\$2.62
NEW ENGLAND - MULO	\$8,822,625	\$8,906,705	-0.9	3,723,302	3,744,790	-0.6	\$4,218.8	\$4,288.2	\$2.37	\$2.38
HARRISBURG/SCRANTON, PA - MULO	\$8,172,575	\$8,245,165	-0.9	4,026,766	3,973,955	1.3	\$3,891.5	\$3,901.2	\$2.03	\$2.07
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$6,145,621	\$6,464,067	-4.9	2,500,943	2,536,819	-1.4	\$3,897.1	\$4,031.9	\$2.46	\$2.55
BUFFALO/ROCHESTER, NY - MULO	\$5,234,793	\$5,301,241	-1.3	2,269,682	2,269,712	0.0	\$3,402.9	\$3,652.0	\$2.31	\$2.34
PITTSBURGH, PA - MULO	\$4,721,067	\$4,803,150	-1.7	2,003,829	2,032,475	-1.4	\$3,705.9	\$3,635.8	\$2.36	\$2.36
SYRACUSE, NY - MULO	\$2,409,545	\$2,481,425	-2.9	1,141,317	1,154,490	-1.1	\$3,682.3	\$3,844.7	\$2.11	\$2.15
ALBANY, NY - MULO	\$2,389,003	\$2,410,585	-0.9	1,075,480	1,089,254	-1.3	\$4,146.0	\$4,177.0	\$2.22	\$2.21
PROVIDENCE, RI - MULO	\$1,713,626	\$1,843,865	-7.1	703,848	705,812	-0.3	\$3,470.5	\$3,742.3	\$2.43	\$2.61

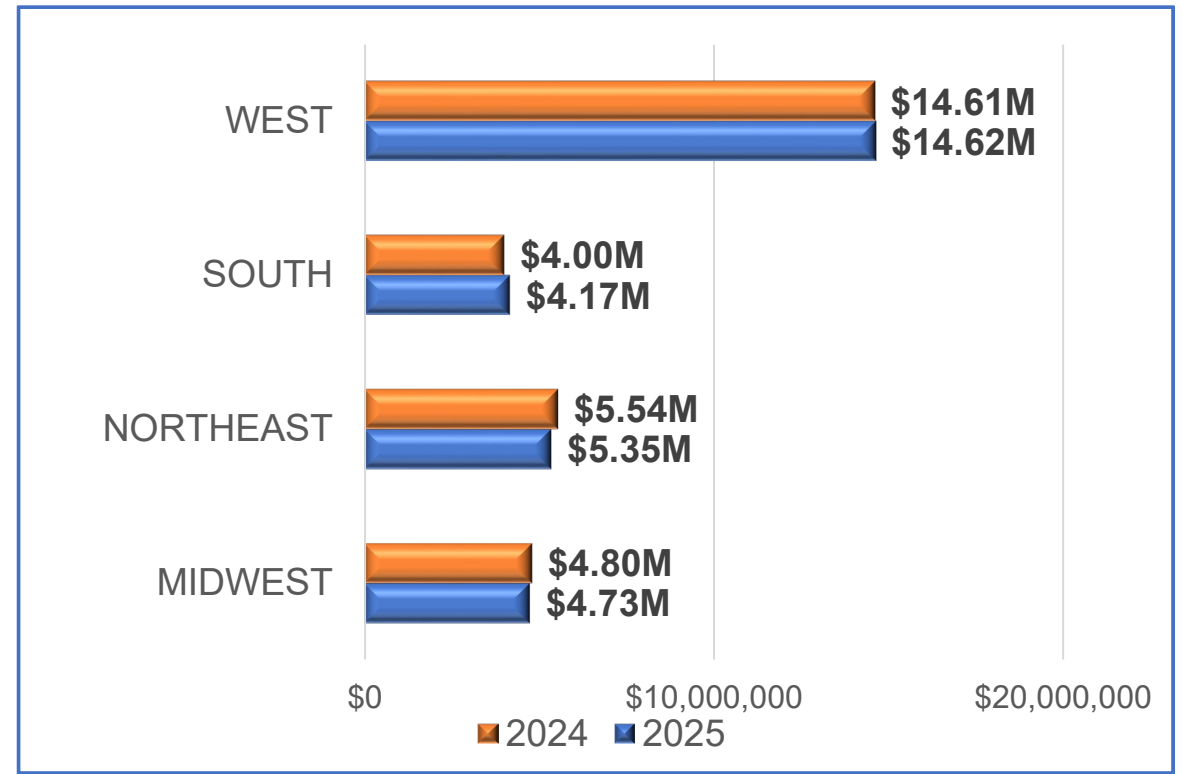
- New York is the largest market(\$26.9M) for SS Mustard, posting negative \$ sales growth of -3.0% and decrease in unit growth of -1.2%.
- New England, the 5th largest market, is responsible for \$8.8M in sales, and is showing a slight dollar decline of -0.9% and unit decrease of -0.6%.
- All markets except for Harrisburg/Scranton are in decline in both dollars and units; Harrisburg/Scranton is in decline in dollar volume, -0.9%, but positive in units +1.3%.

# Natural Channel: SS Mustard - Subcategory

Natural Channel Total US Dollars



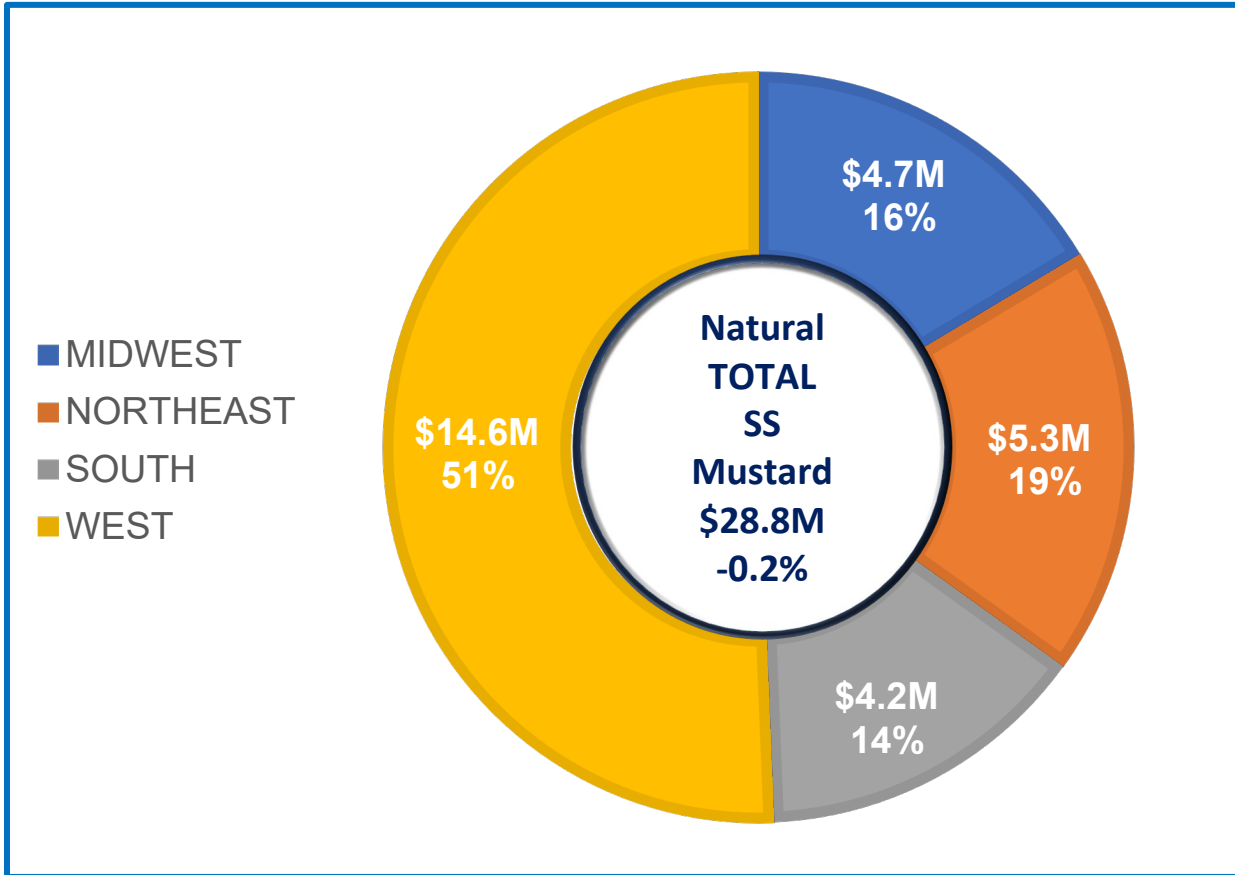
Dollar Change vs Year Ago



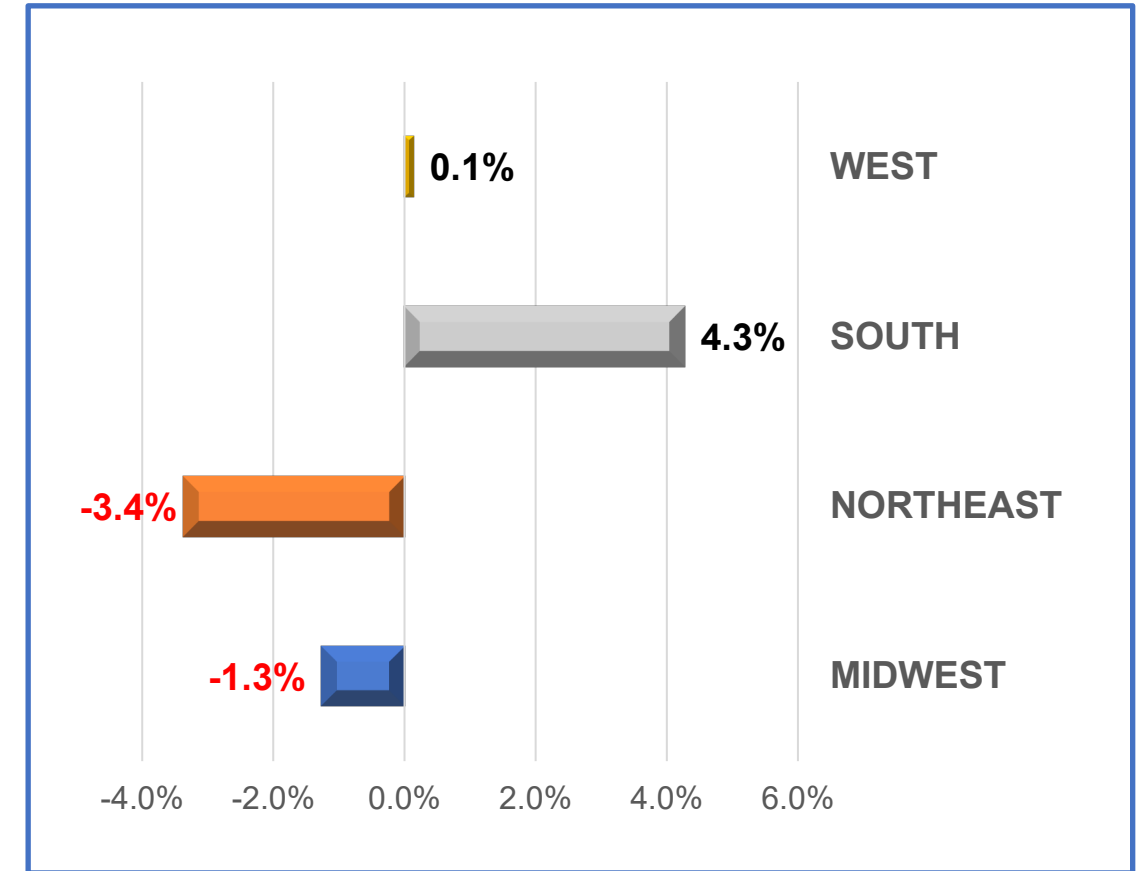
- Total Natural Channel \$ volume for the SS Mustard subcategory is \$28.8M and is in decline -0.2% over prior year.
- The West region is the largest \$ volume region, followed by the Northeast, Midwest, and South, respectively.
- The South and West Regions are posting dollar sales increases, while Midwest and Northeast are in decline in dollars to prior year.

# Natural Channel: SS Mustard- By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West, the most highly developed region for this subcategory, responsible for 51% of \$ volume, is showing slight growth to prior year, +0.1%.
- The Northeast region, the 2<sup>nd</sup> largest market, is showing the highest decline in dollars at -3.4%.
- The 2 remaining regions; Midwest is in decline to prior year dollars at -1.3%, while the South is experiencing highest dollar growth of +4.3%.

# Natural Channel: Mustard

## Top 10 Brands Northeast Census Region

Brand	Dollars %				Units %		Average		ARP, Yago	
	Dollars	Dollars, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Avg % ACV	Items Selling		
<b>MUSTARD</b>	<b>\$5,351,565</b>	<b>\$5,538,258</b>	<b>-3.4</b>	<b>1,298,135</b>	<b>1,361,838</b>	<b>-4.7</b>			<b>\$4.12</b>	<b>\$4.07</b>
GREY POUPON	\$1,042,589	\$1,077,454	-3.2	215,741	223,738	-3.6	70.2	3.2	\$4.83	\$4.82
MAILLE	\$1,022,600	\$930,711	9.9	153,319	151,045	1.5	81.8	4	\$6.67	\$6.16
GULDENS	\$340,327	\$356,110	-4.4	138,982	150,753	-7.8	66.6	2.4	\$2.45	\$2.36
FRENCHS	\$320,729	\$332,302	-3.5	106,322	109,638	-3.0	60.3	3.7	\$3.02	\$3.03
WOODSTOCK	\$282,994	\$306,593	-7.7	80,804	87,114	-7.2	44.8	2.4	\$3.50	\$3.52
PRIMAL KITCHEN	\$181,223	\$165,662	9.4	40,682	37,137	9.5	53.5	1.6	\$4.45	\$4.46
BOARS HEAD	\$166,770	\$200,314	-16.7	36,099	44,189	-18.3	47.8	2.4	\$4.62	\$4.53
PRIVATE LABEL ORGANIC	\$130,198	\$137,021	-5.0	44,759	45,833	-2.3	22.6	3.6	\$2.91	\$2.99
ANNIES HOMEGROWN	\$120,976	\$207,608	-41.7	22,089	40,771	-45.8	32.9	1.7	\$5.48	\$5.09
CADIA	\$109,889	\$73,828	48.8	43,032	29,761	44.6	14	3.3	\$2.55	\$2.48

- SS Mustard in the Natural Channel, is in decline -3.4% in \$ volume to prior year in the Northeast and is in further decline in unit volume at-4.7%.
- Grey Poupon is the leading brand within this segment with \$1.0M in \$ volume, declining -3.2%, with a decrease in unit volume of -3.6%.
- Maille brand, the 2<sup>nd</sup> ranked brand, is showing high growth in \$ volume at +9.9%, and an increase in unit volume at +1.5%.
- Cadia brand is showing highest dollar volume increase, +48.8% and unit growth, +44.6%.
- Boar's Head brand is showing dollar and unit volume decline at -16.7% and-18.3%, respectively.

# Condiments, Dressing & Marinades

## Category & Subcategory Report

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