

REFRIGERATED SALSAS & DIPS

CATEGORY & SUB-CATEGORY REVIEW

JANUARY 2025



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Project Overview

Report Purpose

This report was created to assist businesses selling in the Refrigerated Salsa and Dips 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 Refrigerated Salsa & Dip category, delivering detailed insights into sales performance across diverse channels and US Census territories. Within this expanding category, the report covers three primary subcategories: Salsa, Hummus, and Dips.

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 52 weeks ending December 29, 2024, 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 & Recovery Plan.



How to Use This Report

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

Refrigerated Salsas & Dips is valued at \$3.5 billion in retail sales in the United States

The overall product category grew 4.5%, annually in 2024, and grew in all US Census regions. The South led in sales volume, at \$1.3 billion, and demonstrated a solid growth rate at 4.5%.

Refrigerated subcategories, Dips, Hummus, and Salsas, have shown increases in \$ sales volume compared to the prior year.

Of the 3 subcategories reviewed, Dips, the largest of the 3 categories, experienced the most significant sales increases, accounting for \$2.0B, and very high growth of 7.2% over prior year. Hummus, the 2nd largest category, responsible for \$974.7M in sales, grew only slightly at 0.2%, experiencing dollar sales decline within the Natural Channel (-2.0%).

In the same realm of comparison, Salsas, the smallest subcategory, with \$5.88M in sales, experienced a minor decline of -2.0%. This sub-category experienced a 3.0% increase in overall dollar sales compared to the prior year.

It is important to consider that the inflationary trends of 2024 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 December 29, 2024

Refrigerated Salsa & Dip

- **Sub-Categories:** (*Salsa, Hummus, Dips*)

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).

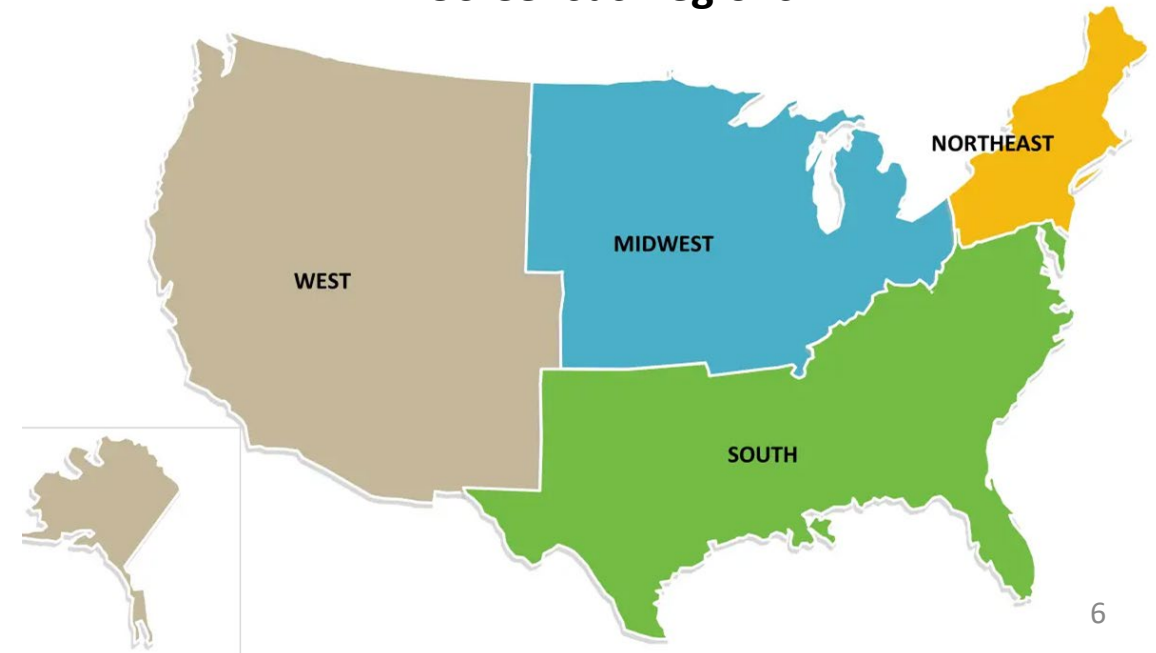
Natural - includes full-format stores with \$2 million+ in annual sales and 40% or more of UPC-coded sales from natural/organic/specialty products. Includes co-ops, associations, independents and large regional chains (excludes Whole Foods & Trader Joes).



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[®]

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.

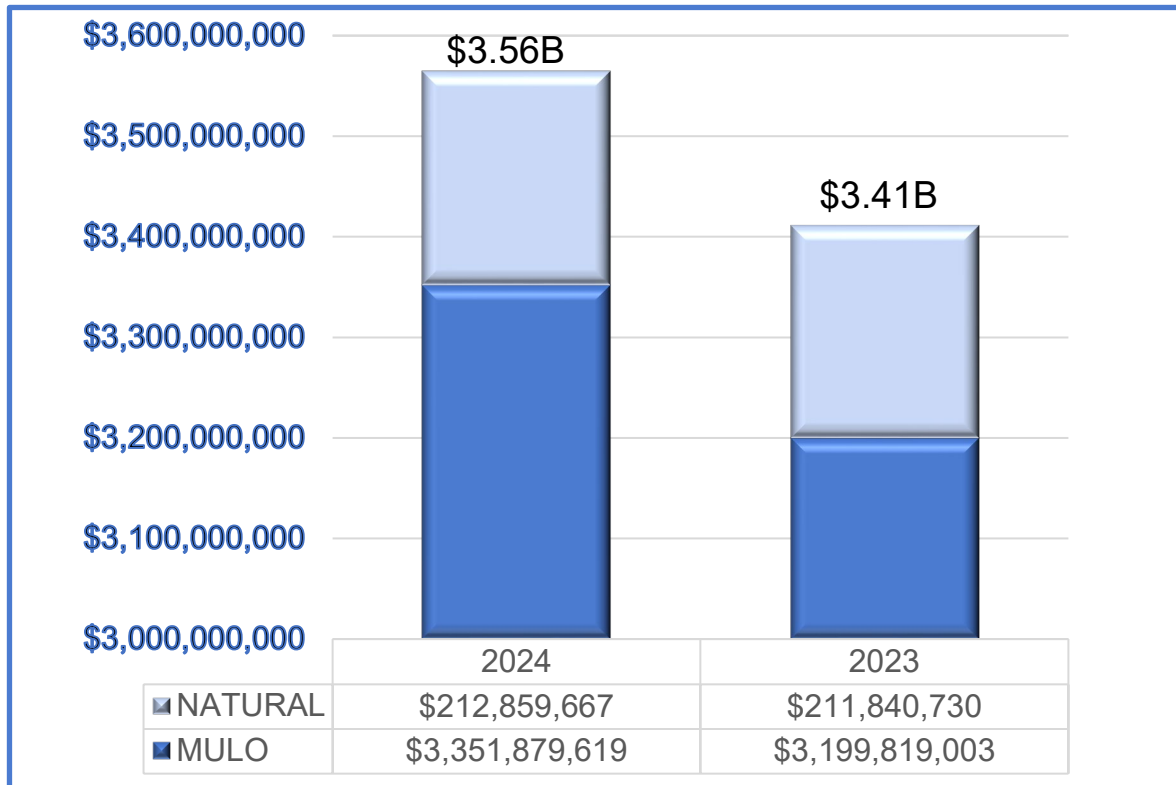
Refrigerated Salsas & Dips

Category Performance

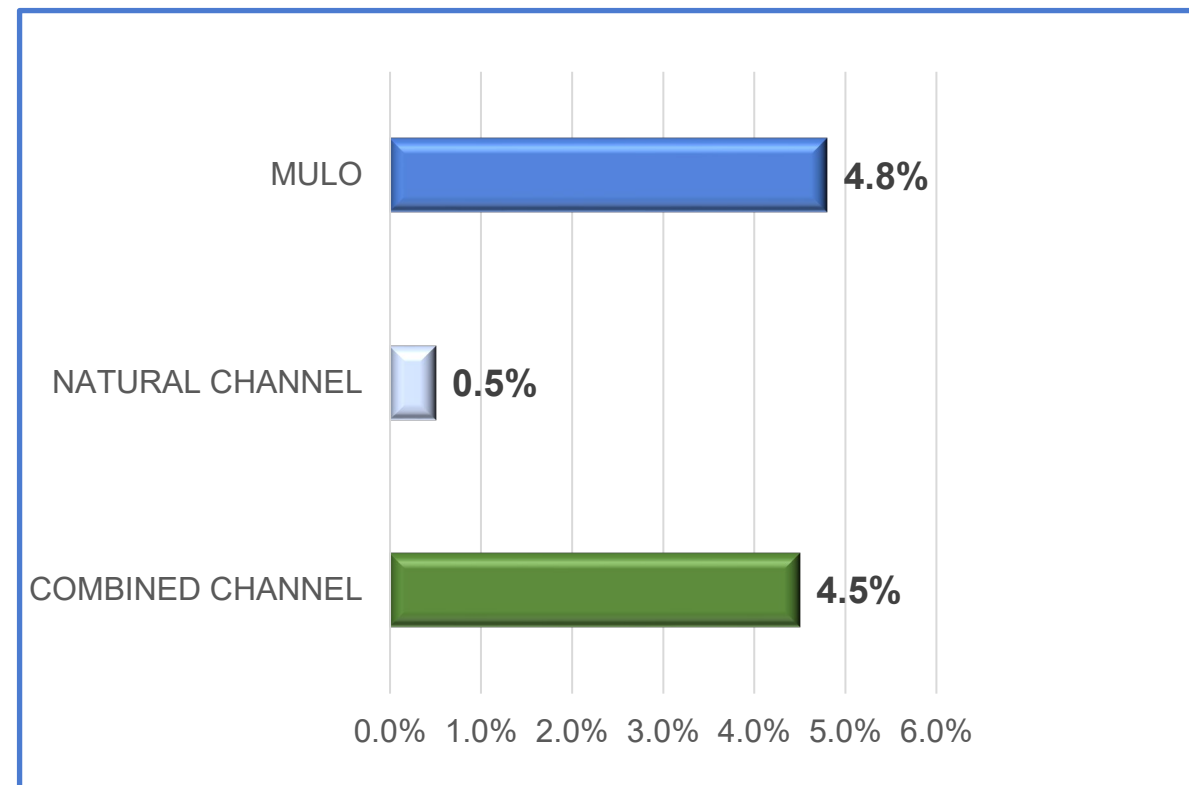
SPINS Satori - 52 Weeks Ending December 29, 2024

Total US Refrigerated Salsas & Dips

Total US Dollars



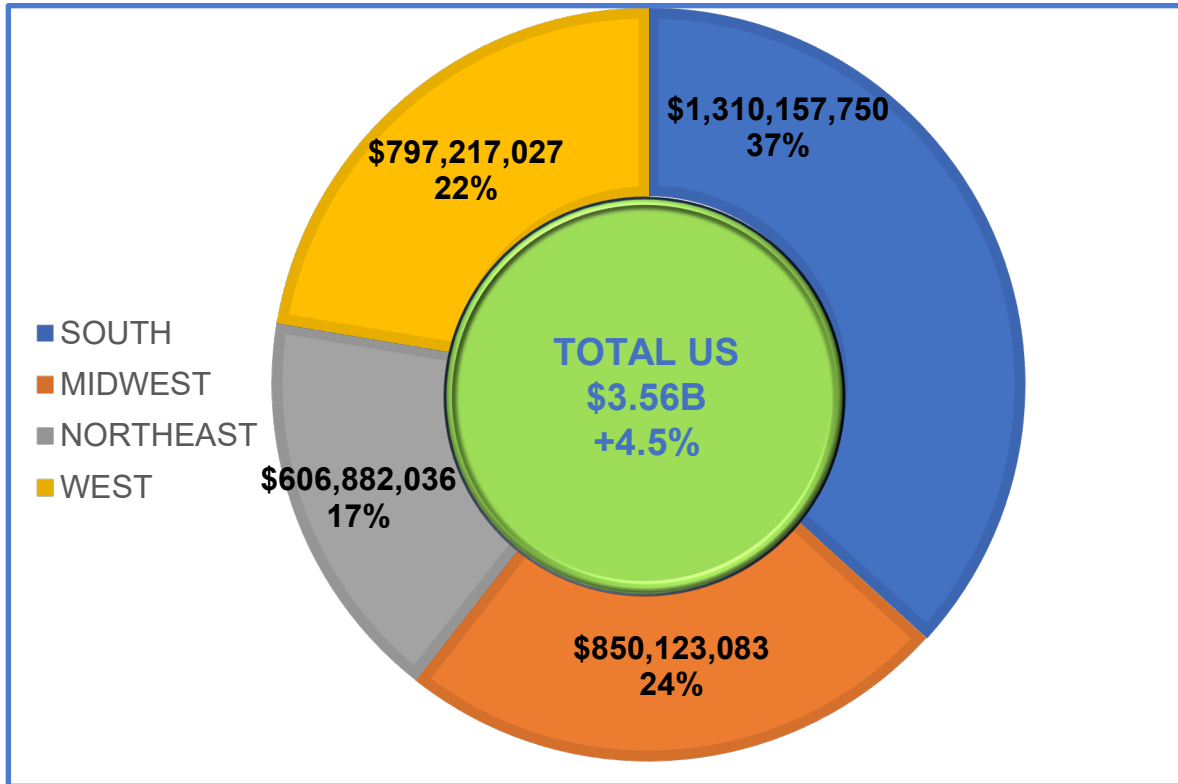
% Dollar Change vs Year Ago



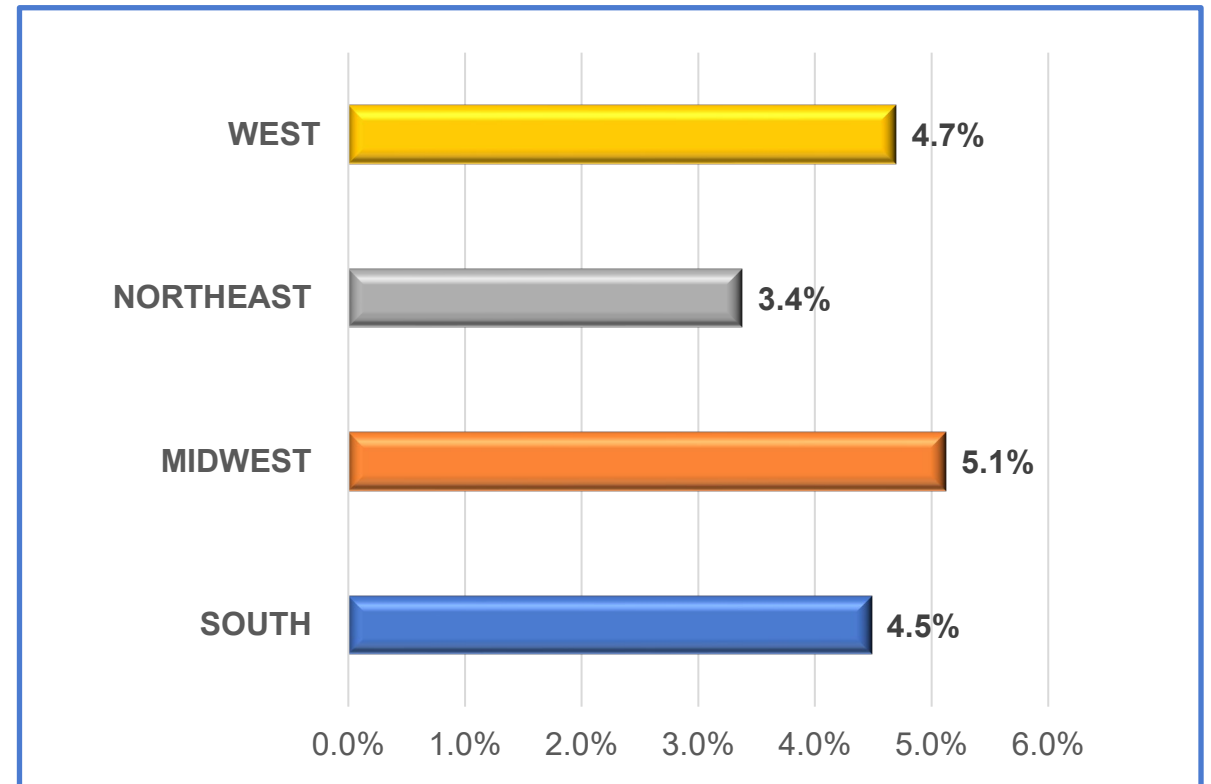
- The Total US refrigerated Salsas & Dips combined channel is a \$3.56M category and is performing better than prior year by 4.5%.
- Sales dollars were up in both the Natural Channel (+0.5%) and MULO (+4.8%).
- As in most categories, MULO represents most category sales.

Total Refrigerated Salsas & Dips Category - By Region

Total Dollars and % Category Share by Region



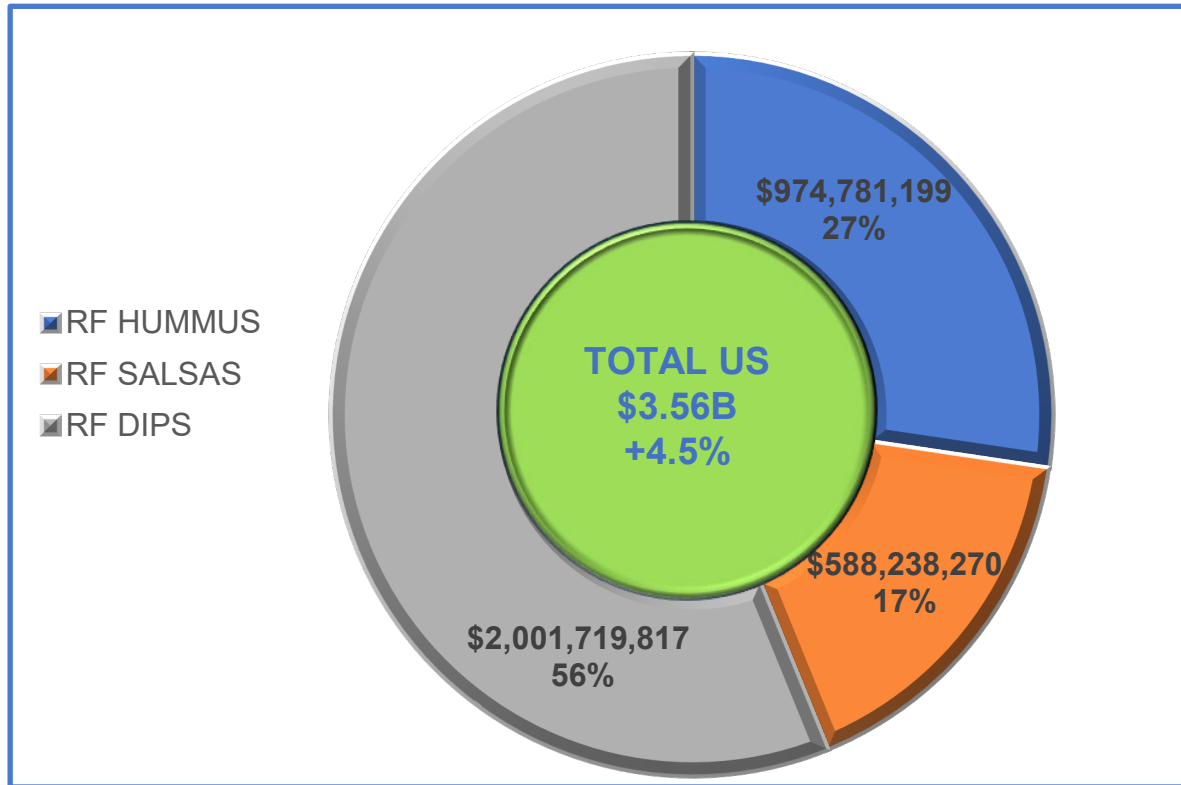
% Dollars Change vs Year Ago



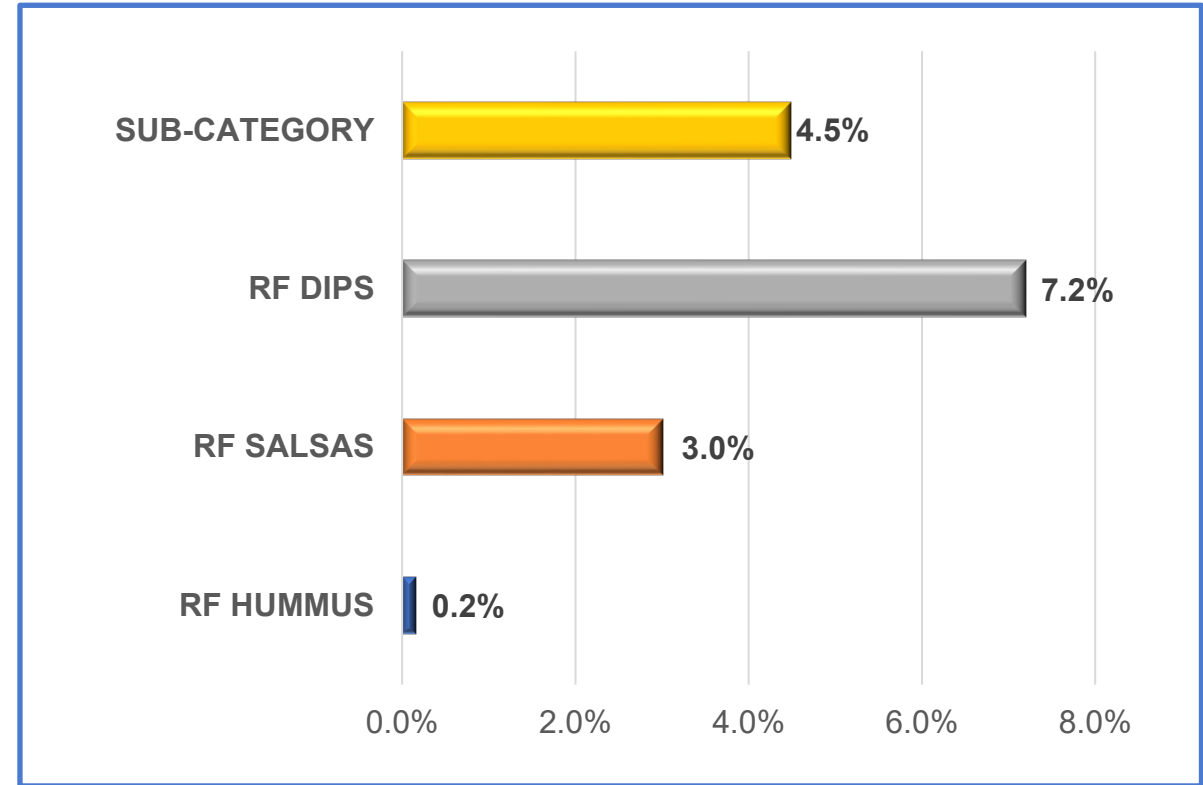
- The South represents 37% (\$1.3B) of total category sales dollars, followed by the Midwest (24%), the West (22%) and the Northeast (17%).
- All 4 regions experienced growth over the prior year.

Total US Refrigerated Salsas & Dips - By Subcategory

Total Subcategory \$ and % Category Share



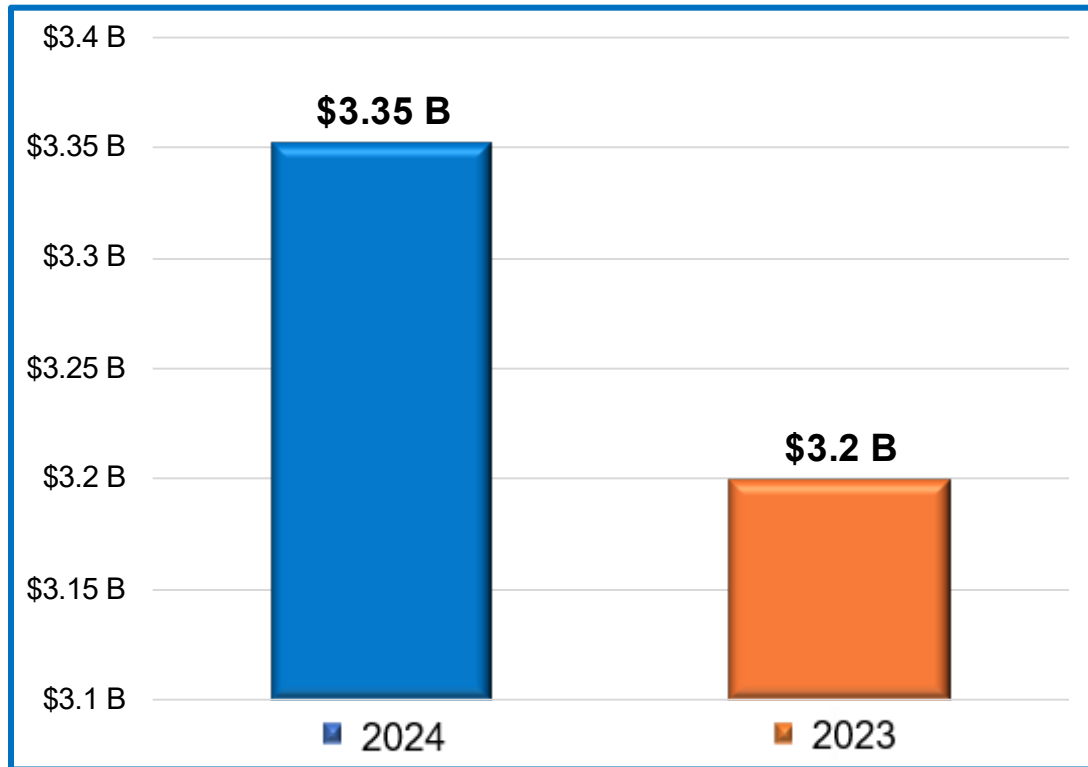
% Dollar Change vs Year Ago



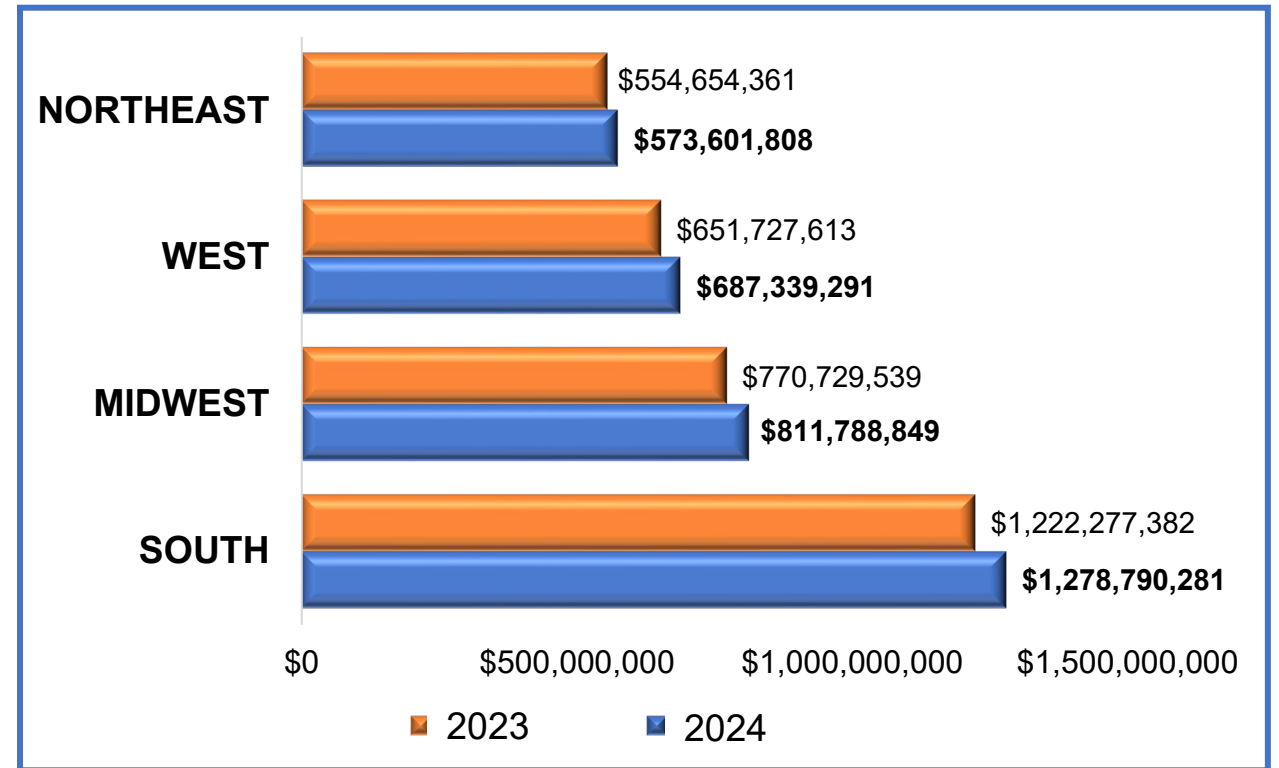
- Refrigerated Salsas & Dips is made up of Subcategories: *Dips, Salsas and Hummus*.
- Refrigerated Dips is the largest of the four Subcategories with 56% of category sales (\$2.00B) and is showing the largest subcategory dollar growth at +7.2%.
- Refrigerated Hummus is the 2nd largest of the 3 subcategories, representing \$974M and 27% of total category sales.
- Refrigerated Salsas is the 3rd ranking sub-category with 17% of dollar volume.

MULO: Refrigerated Salsas & Dips

MULO Dollars



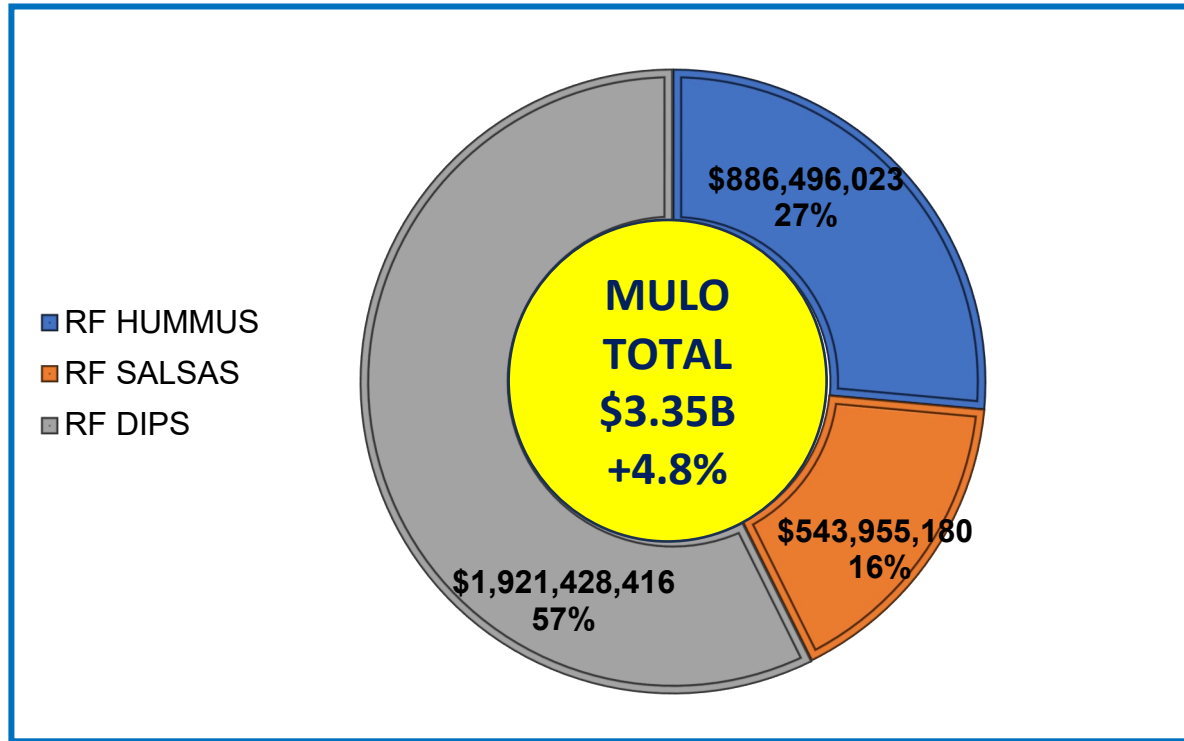
Dollar Change vs Year Ago by Region



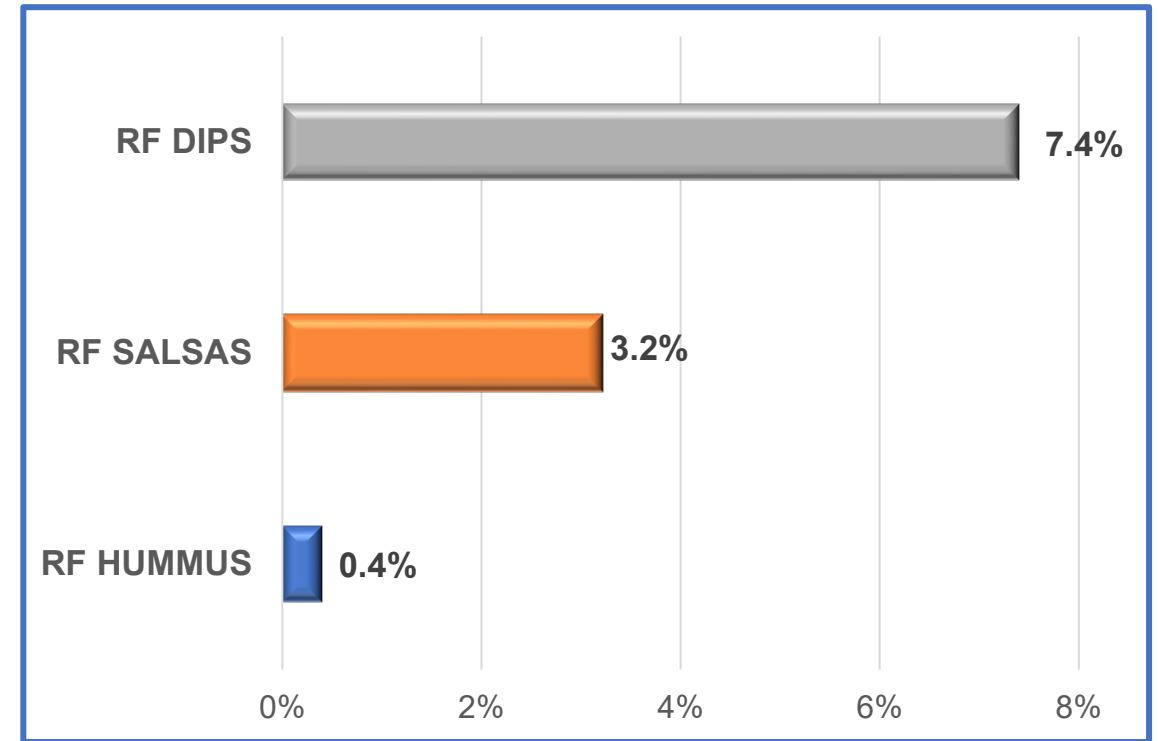
- Total US MULO dollar volume for the category is \$3.35B and is performing better than prior year by 4.8%.
- The South region is the largest \$ volume region, representing 38% of total MULO sales, followed by Midwest, West and Northeast, respectively.
- All 4 regions and Total US are posting sales that are greater than prior year.

MULO: Refrigerated Salsas & Dips - By Subcategory

MULO Subcategory \$ and % Category Share



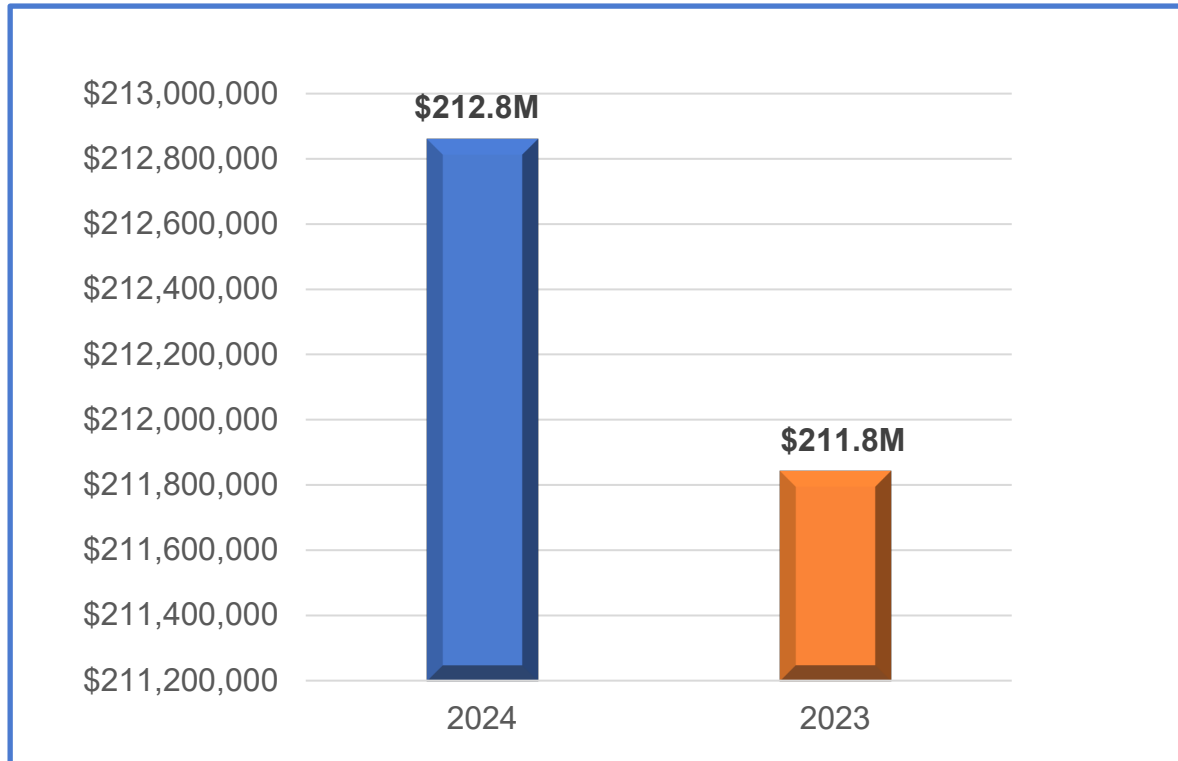
% Dollar Change vs Year Ago



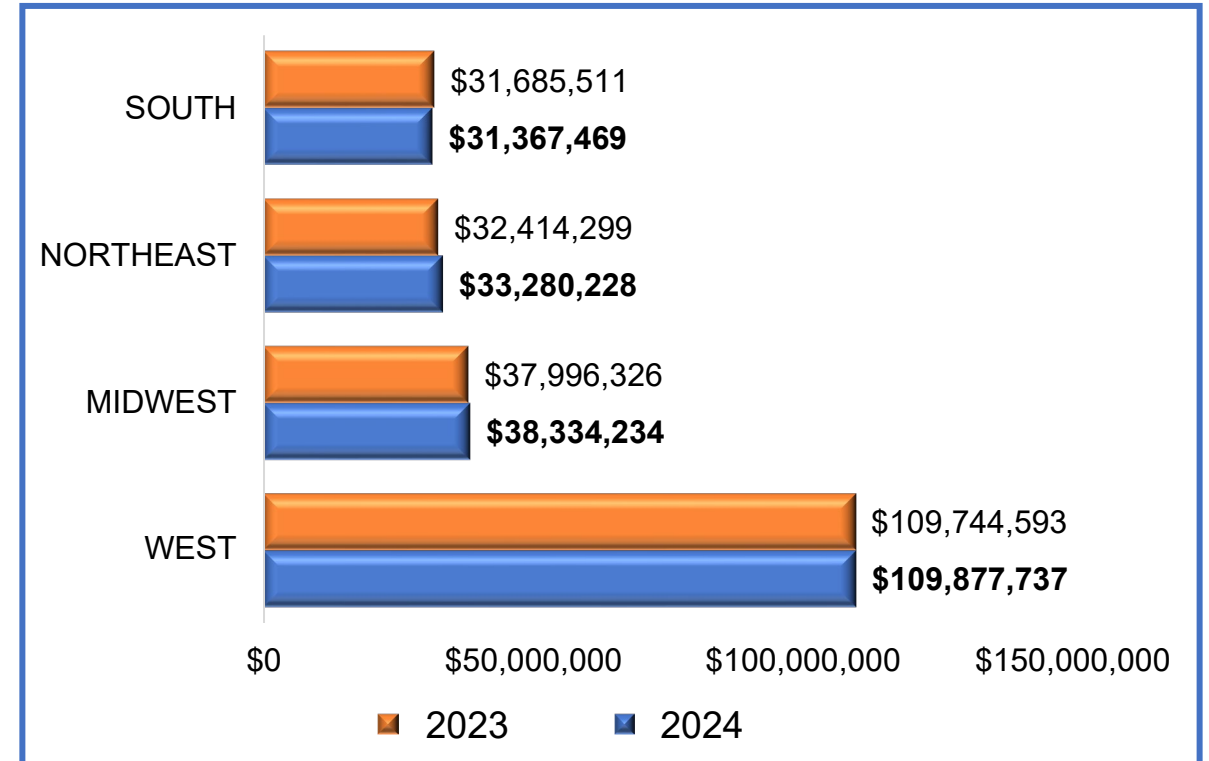
- Refrigerated Dips is the largest subcategory, representing \$1.9B, or 57% of total MULO \$ volume, with growth of 7.4%.
- Refrigerated Salsas and Hummus represent the remainder of category volume, both Salsas and Hummus are performing positive to prior year, +3.2% and +0.4%, respectively.

Natural Channel: Refrigerated Salsas & Dips - Category

Natural Channel Dollars



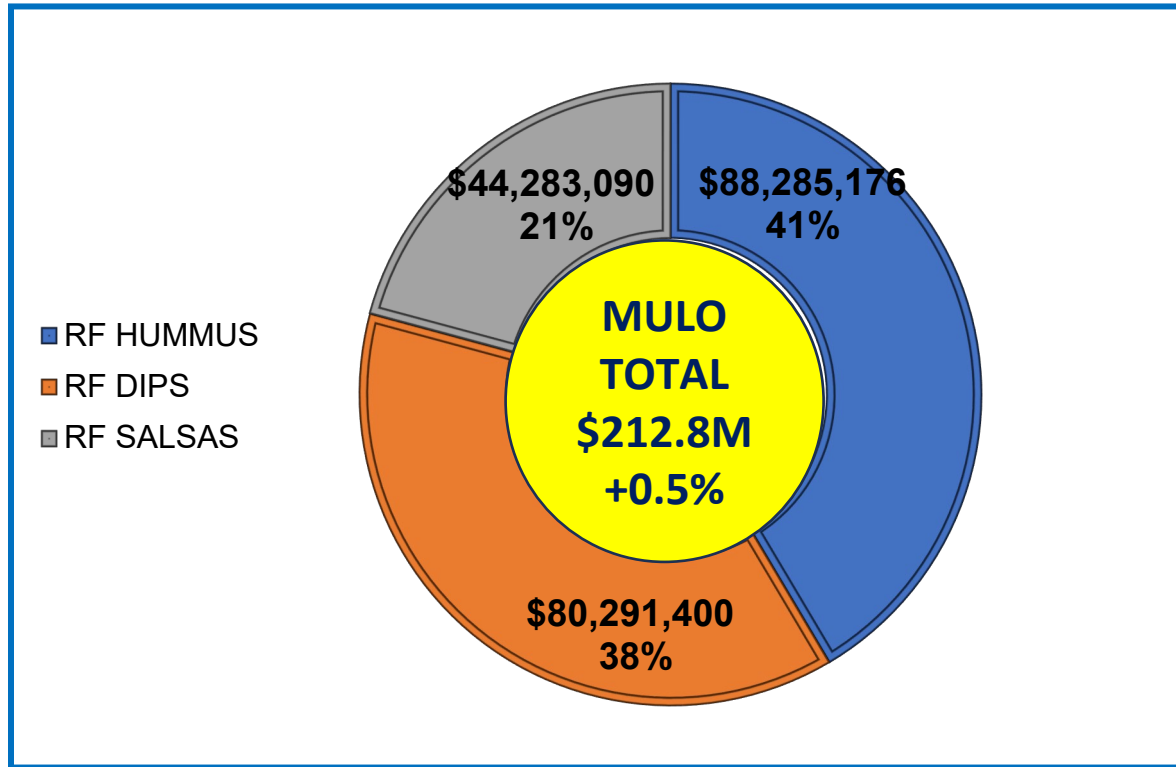
Dollar Change vs Year Ago by Region



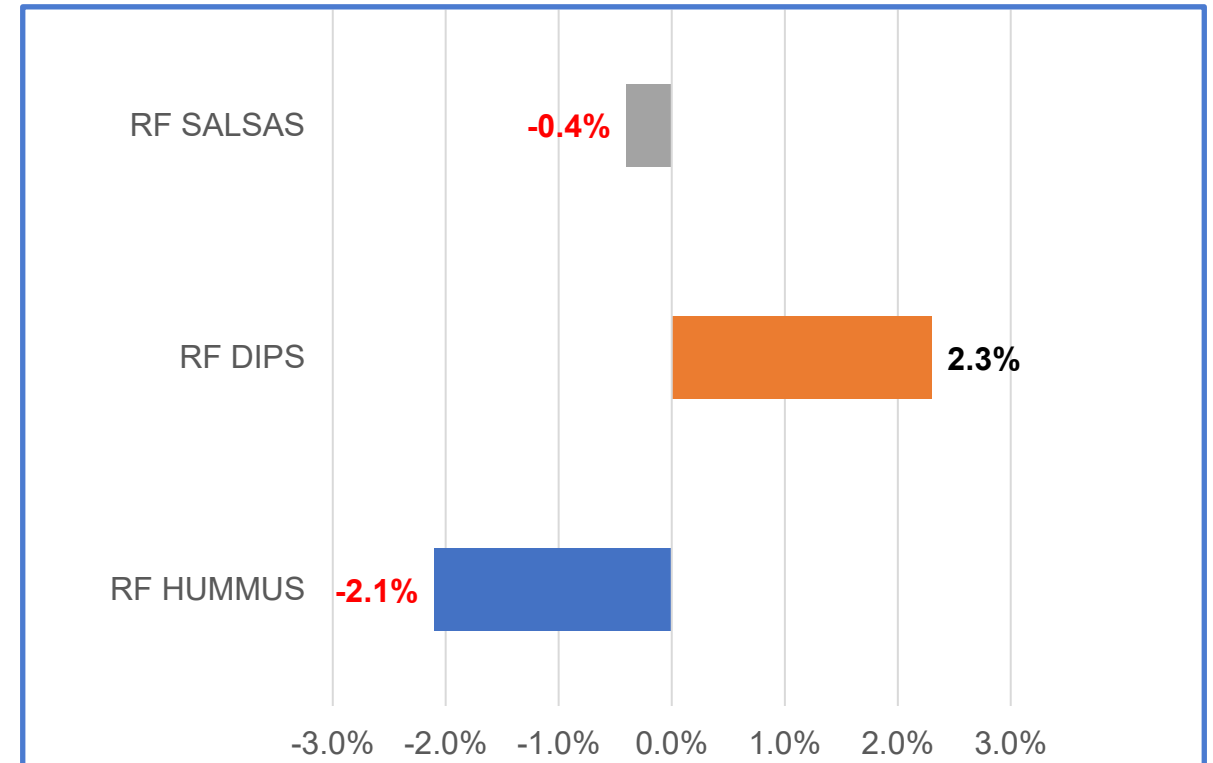
- Natural Channel \$ volume for the category is \$212.8M and has grown 0.5% over prior year.
- The West region is the largest \$ volume region, representing 51% of total Natural Channel category sales, followed by Midwest, Northeast and South regions, respectively.
- All 4 regions, with exception of the South, are posting sales greater than the prior year; the South is in decline -1.0% to prior year.

Natural Channel: Refrigerated Salsas & Dips - By Subcategory

Natural Channel Subcategory \$ and % Category Share



% Dollar Change vs Year Ago



- Refrigerated Hummus is the largest segment in the Natural Channel, representing 41% of sales \$, in decline to PY at -2.1%.
- Refrigerated Dips is the 2nd largest segment in the Natural Channel, at 38% of \$ volume is showing dollar growth, at +2.3%.
- Refrigerated Salsa is the 3rd largest segment at 21% of \$ volume and is showing a slight decline in % dollar change, at -0.4%.

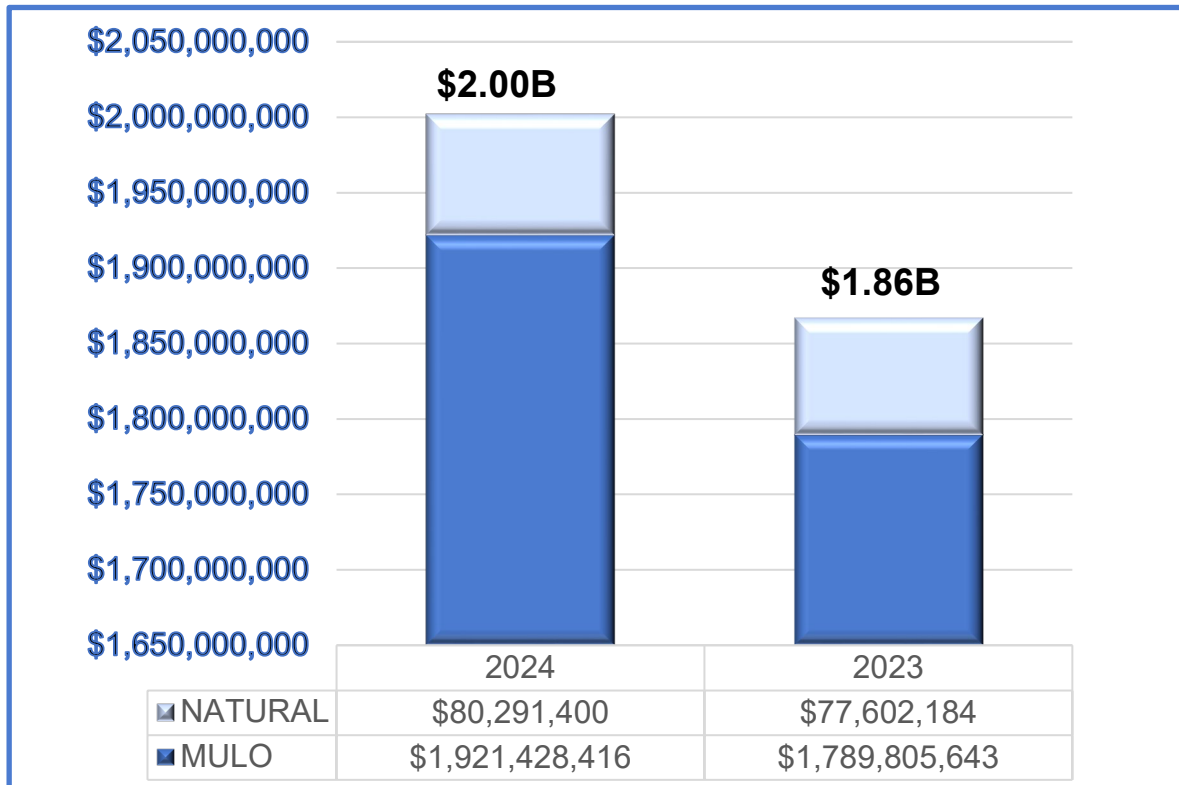
Refrigerated Dips

Sub-category Performance

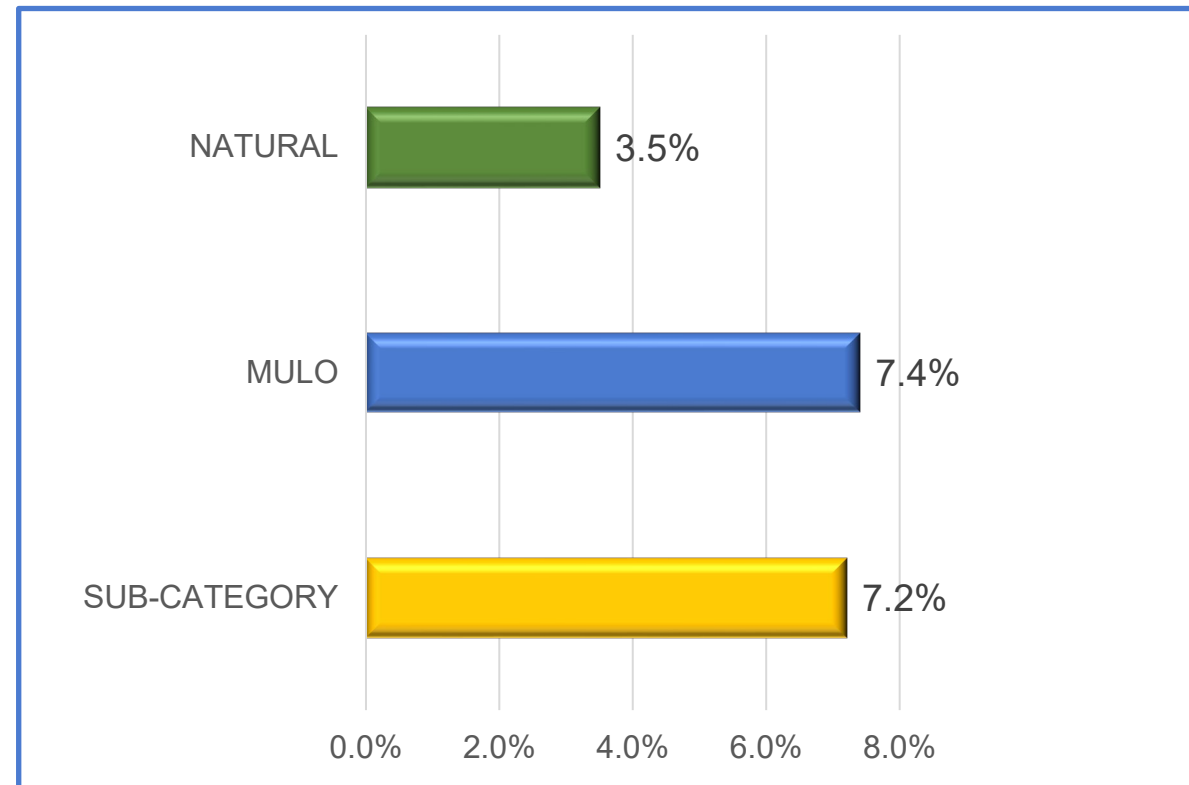
SPINS Satori - 52 Weeks Ending December 29, 2024

Total US Refrigerated Dips

Total US Dollars



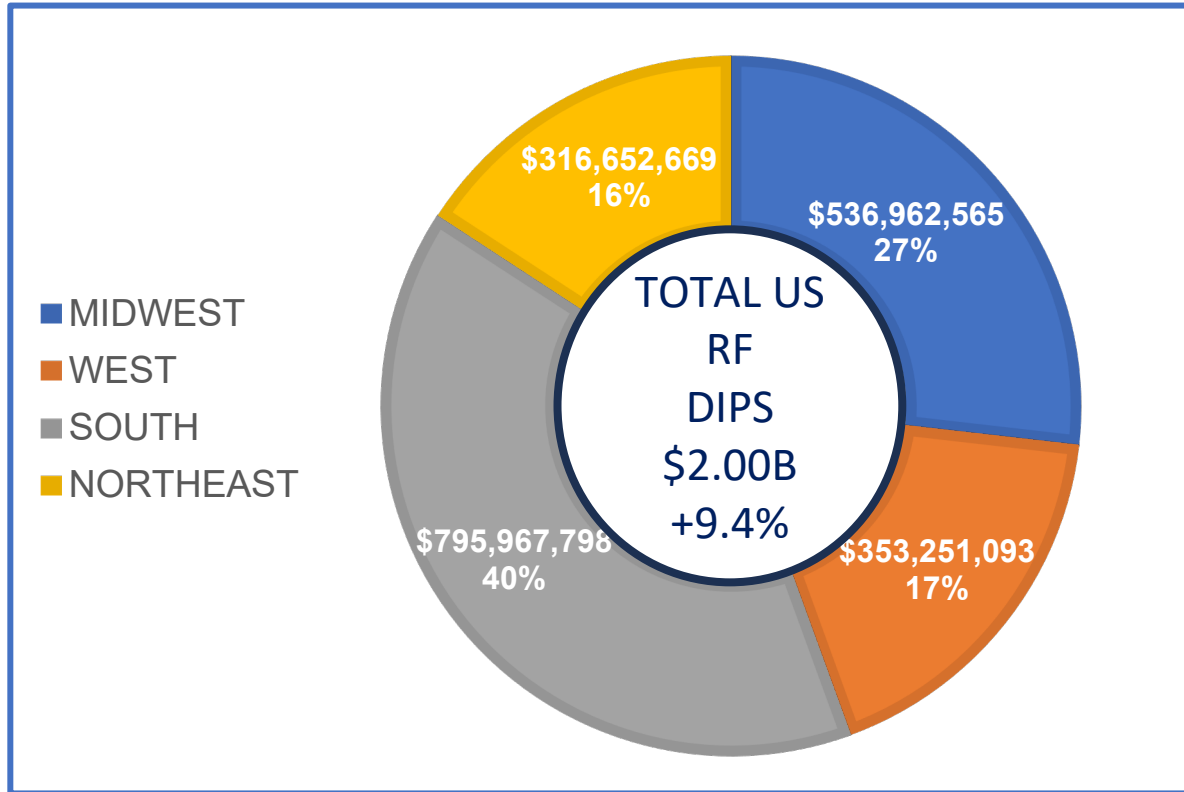
% Dollar Change vs Year Ago



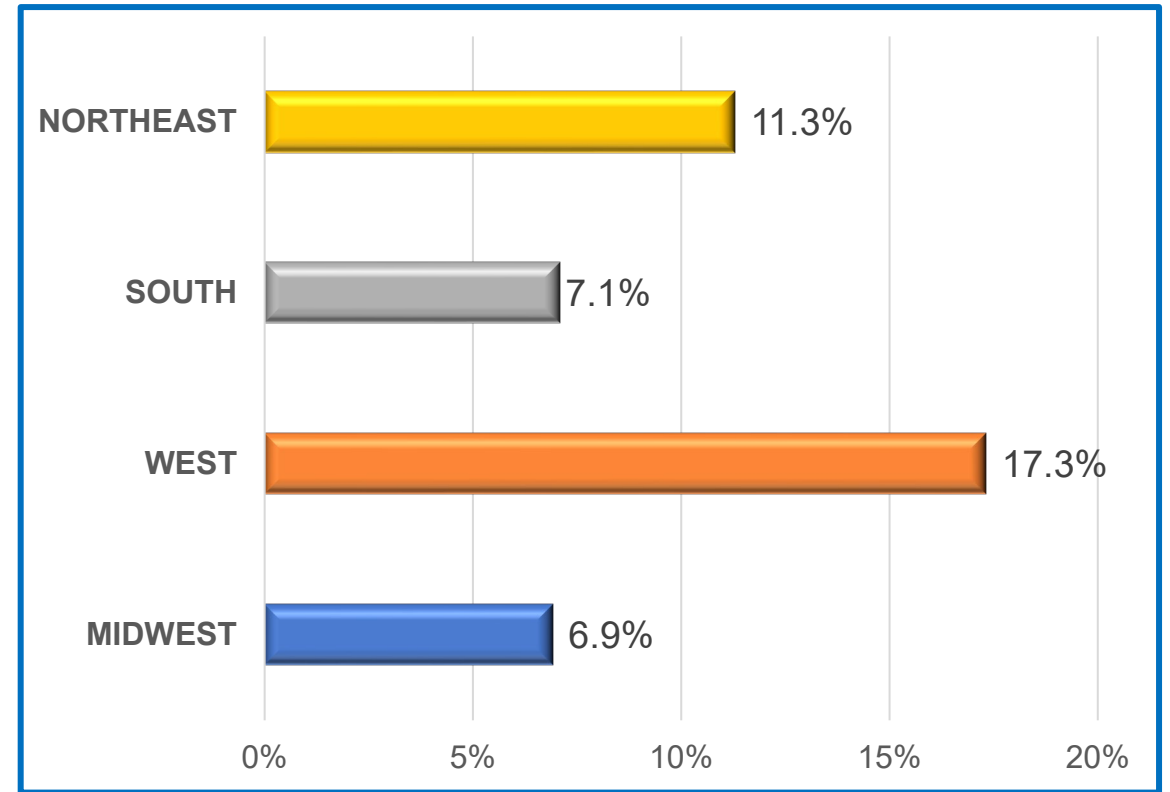
- Total US Refrigerated Dips is a \$2.0B subcategory (the largest of the subcategories) and is performing better than prior year by 7.2%.
- Sales dollars were up in both the Natural Channel (+3.5%) and MULO (+7.4%).
- MULO represents most of the subcategory sales and experienced higher growth than the Natural Channel over prior year.

Total US Refrigerated Dips Subcategory - By Region

Total Dollars and % Category Share by Region



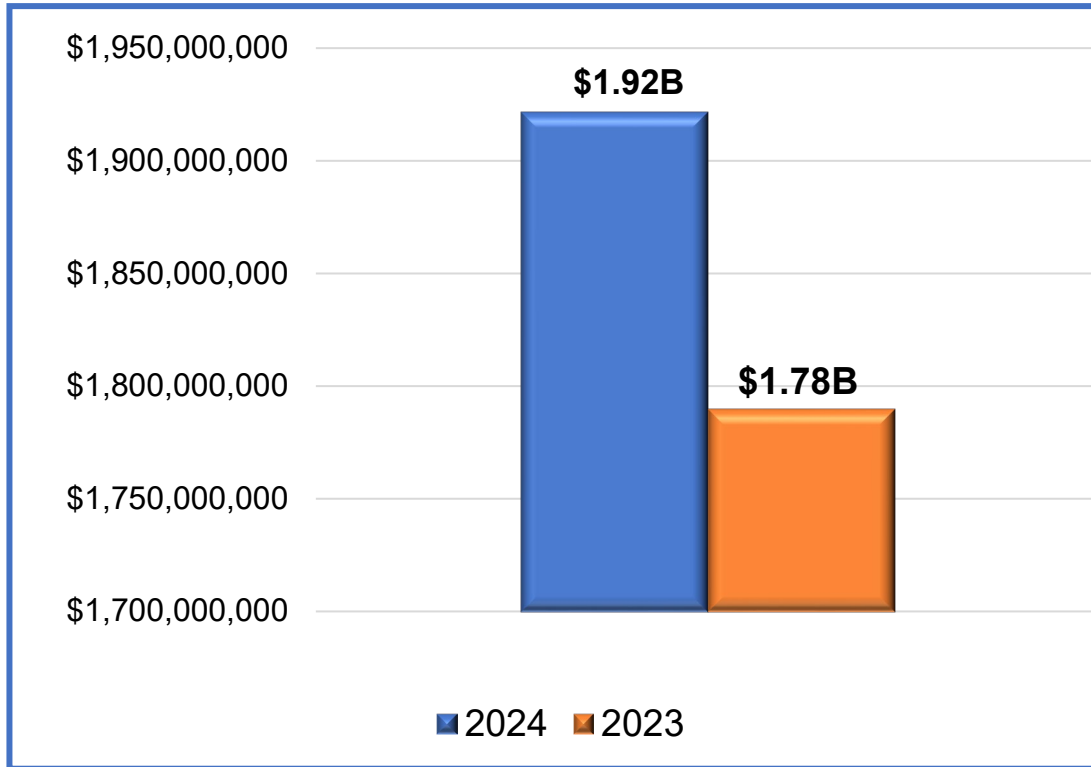
% Dollar Change vs Year Ago



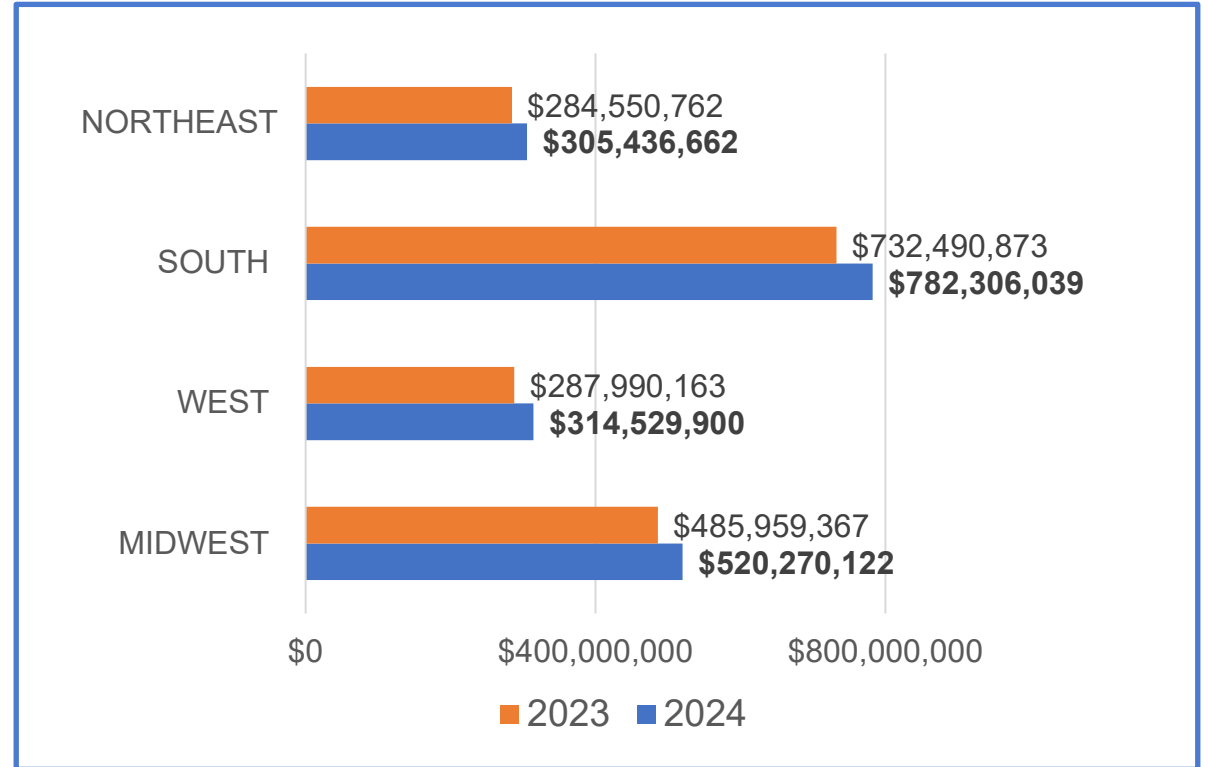
- The South region is the most highly developed region for this subcategory, responsible for 40% of \$ volume.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining \$ volume with respective growth of 17.3%, 11.3% and 6.9%, respectively.

Total US MULO: Refrigerated Dips Subcategory

MULO Total US Dollars



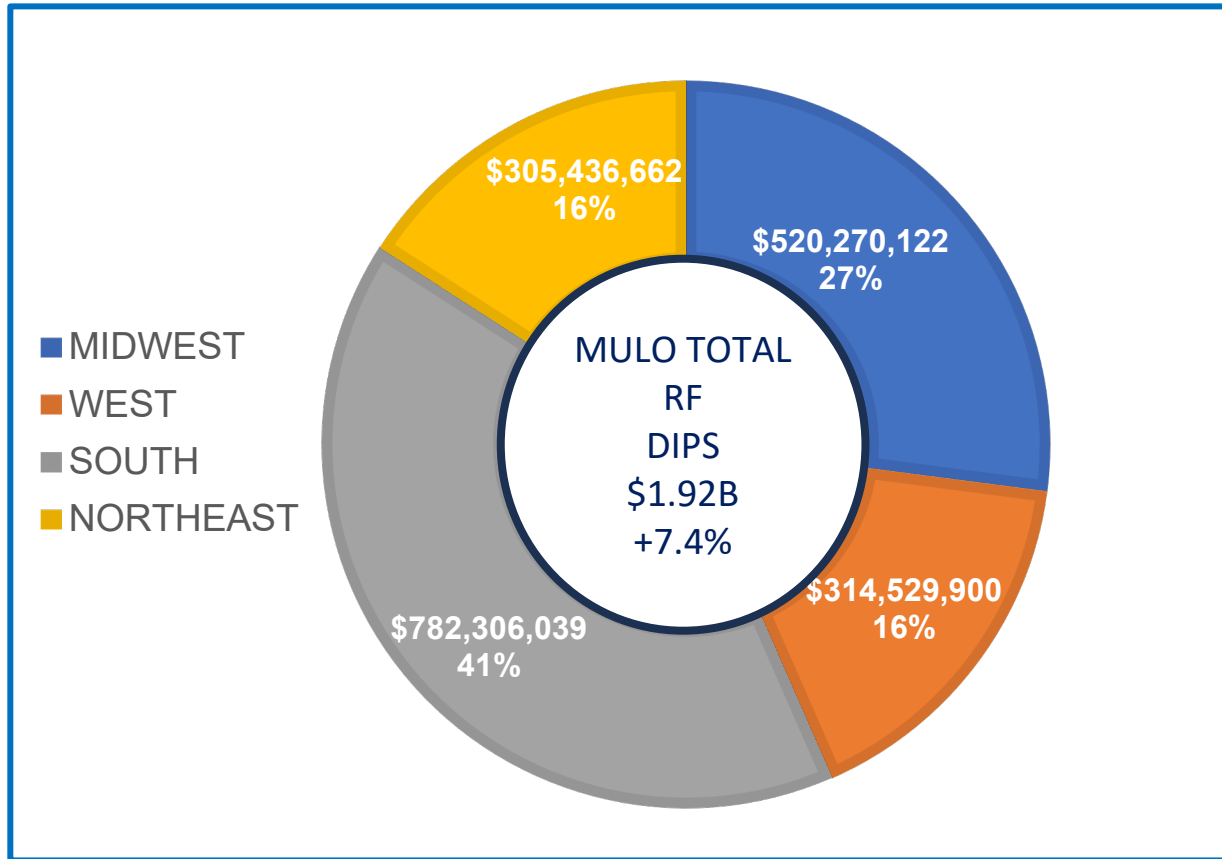
Dollar Change vs Year Ago



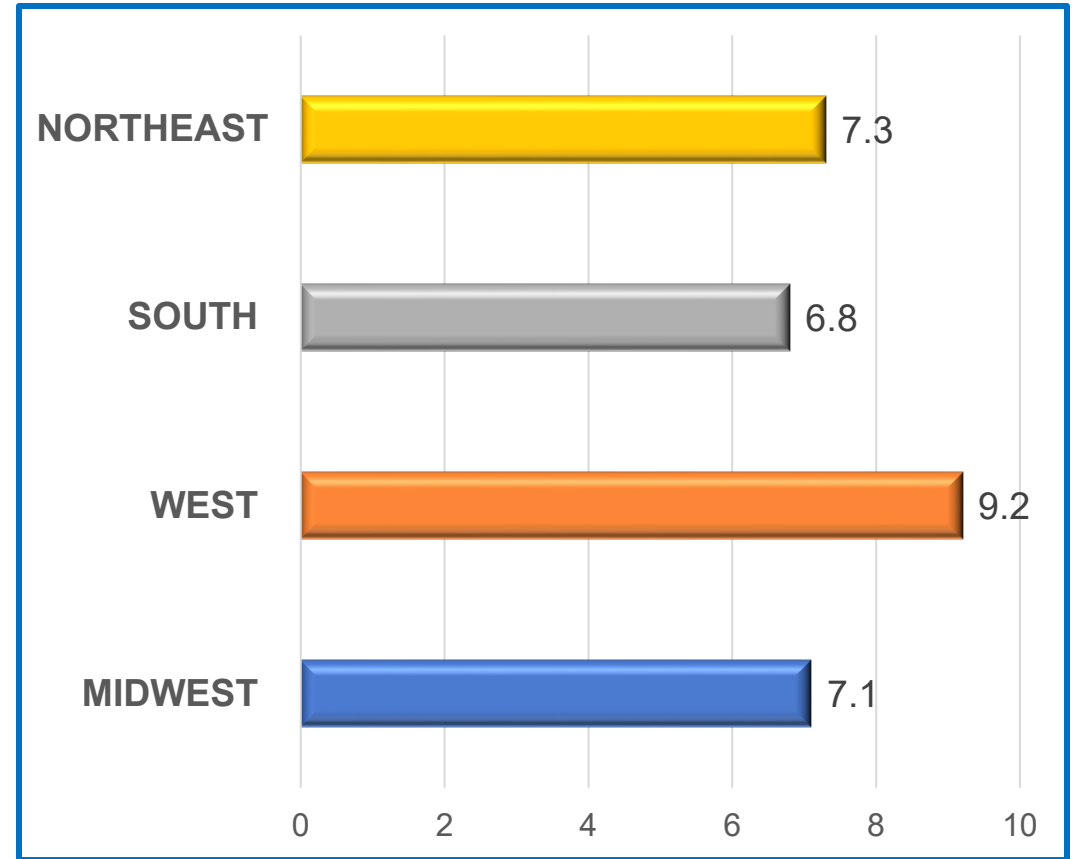
- Total US MULO \$ volume for Refrigerated Dips is \$1.92B and grew 7.4% over prior year.
- The South region is the largest \$ volume region, followed by Midwest, West and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

Total US MULO: Refrigerated Dips Sub-category - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 41% of \$ volume with \$ growth of 6.8%
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining 59% of \$ volume with respective growth of 7.3%, 9.2%, and 7.1%.

MULO: Refrigerated Dips

Top Markets Northeast Census Region

Geography	Description	Dollars			Units %			TDP	TDP, Yago	ARP	ARP, Yago
		Dollars	Dollars, Yago	% Chg, Yago	Units	Units, Yago	Chg, Yago				
NEW YORK, NY - MULO	RF DIPS	\$64,998,670	\$57,921,290	12.2	13,255,161	11,975,302	10.7	4135.7	3752.2	4.9	4.84
PHILADELPHIA, PA - MULO	RF DIPS	\$37,104,257	\$33,971,590	9.2	8,405,688	7,688,306	9.3	4836.4	4505.2	4.41	4.42
BOSTON, MA - MULO	RF DIPS	\$30,317,955	\$28,061,332	8.0	7,085,241	6,605,952	7.3	4093.4	3900.7	4.28	4.25
NEW ENGLAND - MULO	RF DIPS	\$27,952,391	\$26,758,419	4.5	7,065,745	6,760,532	4.5	4654.8	4431.6	3.96	3.96
HARRISBURG/SCRANTON, PA - MULO	RF DIPS	\$26,452,834	\$24,606,028	7.5	6,687,887	6,213,481	7.6	4646.5	4356.3	3.96	3.96
BUFFALO/ROCHESTER, NY - MULO	RF DIPS	\$25,737,599	\$24,678,736	4.3	7,135,235	6,877,239	3.8	3937.4	3726.6	3.61	3.59
PITTSBURGH, PA - MULO	RF DIPS	\$18,720,372	\$18,179,895	3.0	5,264,037	5,034,177	4.6	3828.3	3734.6	3.56	3.61
HARTFORD, CT/SPRINGFIELD, MA - MULO	RF DIPS	\$17,780,125	\$16,295,671	9.1	4,209,025	3,873,148	8.7	4346.3	3920	4.22	4.21
SYRACUSE, NY - MULO	RF DIPS	\$9,809,168	\$9,655,147	1.6	2,706,251	2,637,559	2.6	4028.4	3825.8	3.62	3.66
ALBANY, NY - MULO	RF DIPS	\$8,047,283	\$7,940,186	1.3	2,111,541	2,051,065	2.9	4541.9	4321.6	3.81	3.87
PROVIDENCE, RI - MULO	RF DIPS	\$4,879,751	\$4,326,291	12.8	1,154,782	1,030,648	12.0	3911.7	3606.1	4.23	4.2

- New York is the largest market for Refrigerated Dips, posting positive \$ sales growth of 12.2% and an increase in unit growth, +10.7%.
- New England, the 4th largest market, responsible for \$27.9M in sales, is showing dollar growth and unit growth of +4.5%.
- Providence the 11th ranked market in \$ sales is showing the highest dollar and unit growth at 12.8% and 12.0%, respectively.

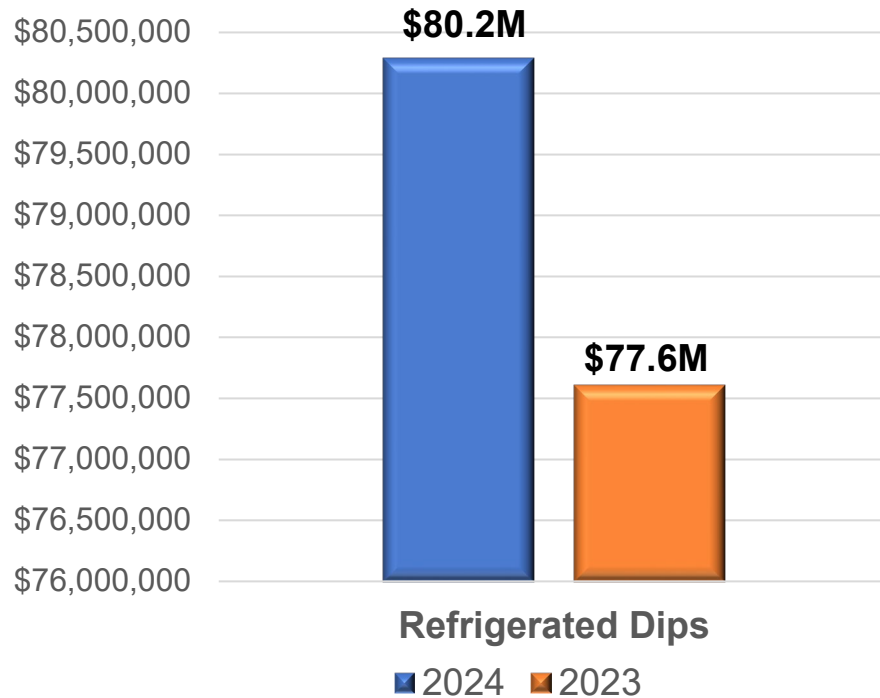
MULO: Refrigerated Dips Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago
REFRIGERATED SALSAS & DIPS	\$573,601,808	\$554,654,361	3.4	141,647,853	138,265,451	2.4			4.05	4.01
RF DIPS	\$305,436,662	\$284,550,762	7.3	74,287,451	69,536,457	6.8			4.11	4.09
PRIVATE LABEL	\$86,143,331	\$78,061,870	10.4	20,765,992	18,541,606	12.0	77.6	8.6	4.15	4.21
HELUVA GOOD	\$47,405,782	\$47,237,192	0.4	18,596,694	18,011,918	3.2	84.1	4.6	2.55	2.62
WHOLLY	\$30,845,027	\$30,062,067	2.6	5,589,942	5,468,909	2.2	75.9	5.3	5.52	5.5
MARZETTI	\$16,623,786	\$18,235,929	-8.8	3,789,560	4,073,139	-7.0	68.7	7.2	4.39	4.48
SABRA	\$14,539,100	\$16,977,685	-14.4	2,623,379	3,099,753	-15.4	59	3	5.54	5.48
YUCATAN	\$10,447,491	\$9,872,808	5.8	1,802,603	1,728,198	4.3	50.1	4	5.8	5.71
CEDARS	\$10,133,550	\$10,471,735	-3.2	1,917,140	2,049,361	-6.5	44	3.5	5.29	5.11
NOBRAND	\$8,024,584	\$3,440,199	133.3	1,353,600	531,481	154.7	24.2	2.3	5.93	6.47
BISON	\$7,447,926	\$7,472,532	-0.3	2,774,873	2,858,760	-2.9	7	1.8	2.68	2.61
GOODFOODS	\$5,938,877	\$5,353,298	10.9	713,314	693,492	2.9	12.2	4.2	8.33	7.72

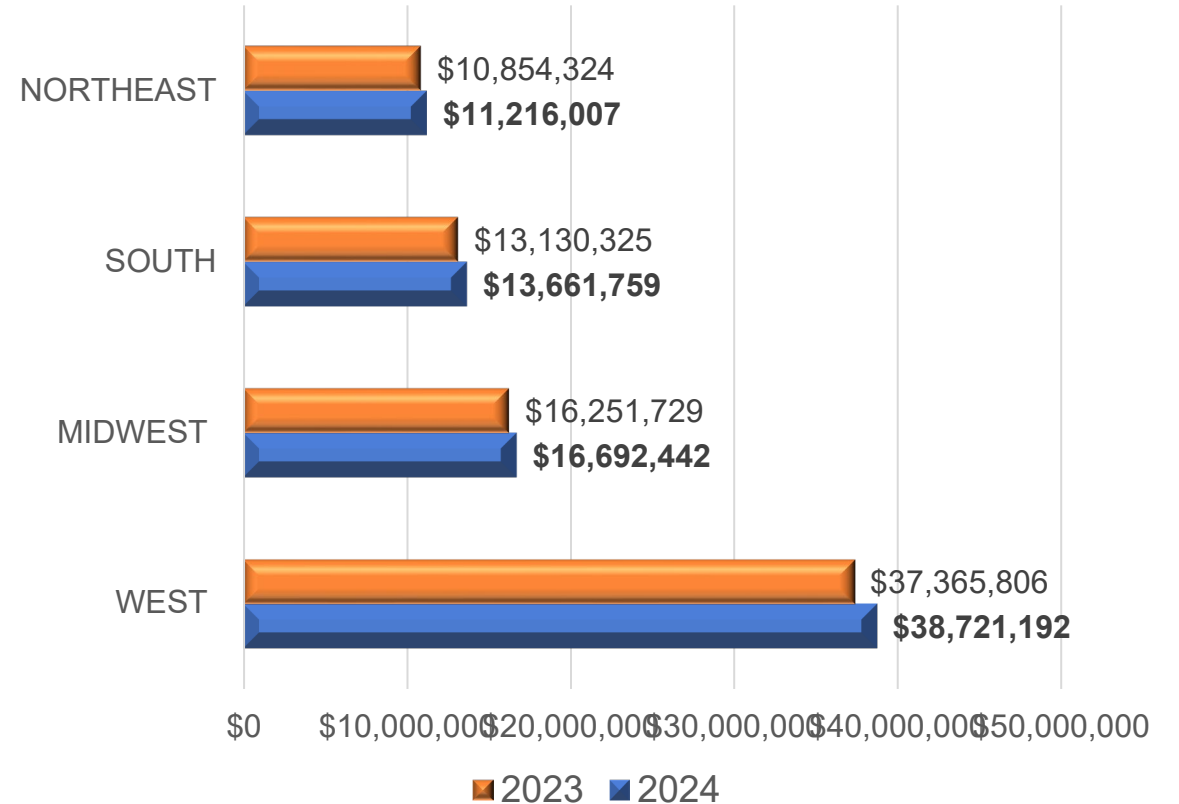
- MULO Northeast Refrigerated Dips is showing 7.3% growth over prior year in \$ volume with units up 6.8%.
- Private Label brands (retailer brands produced by others) are highly developed in \$ sales and are growing at 10.4% in \$ sales and 12.0% in unit sales.
- Heluva Good is the lead brand, growing in both \$ and unit sales and commands 15.5% share of total segment \$ sales in the Northeast.

Natural Channel: Refrigerated Dips - Subcategory

Natural Channel Total US Dollars



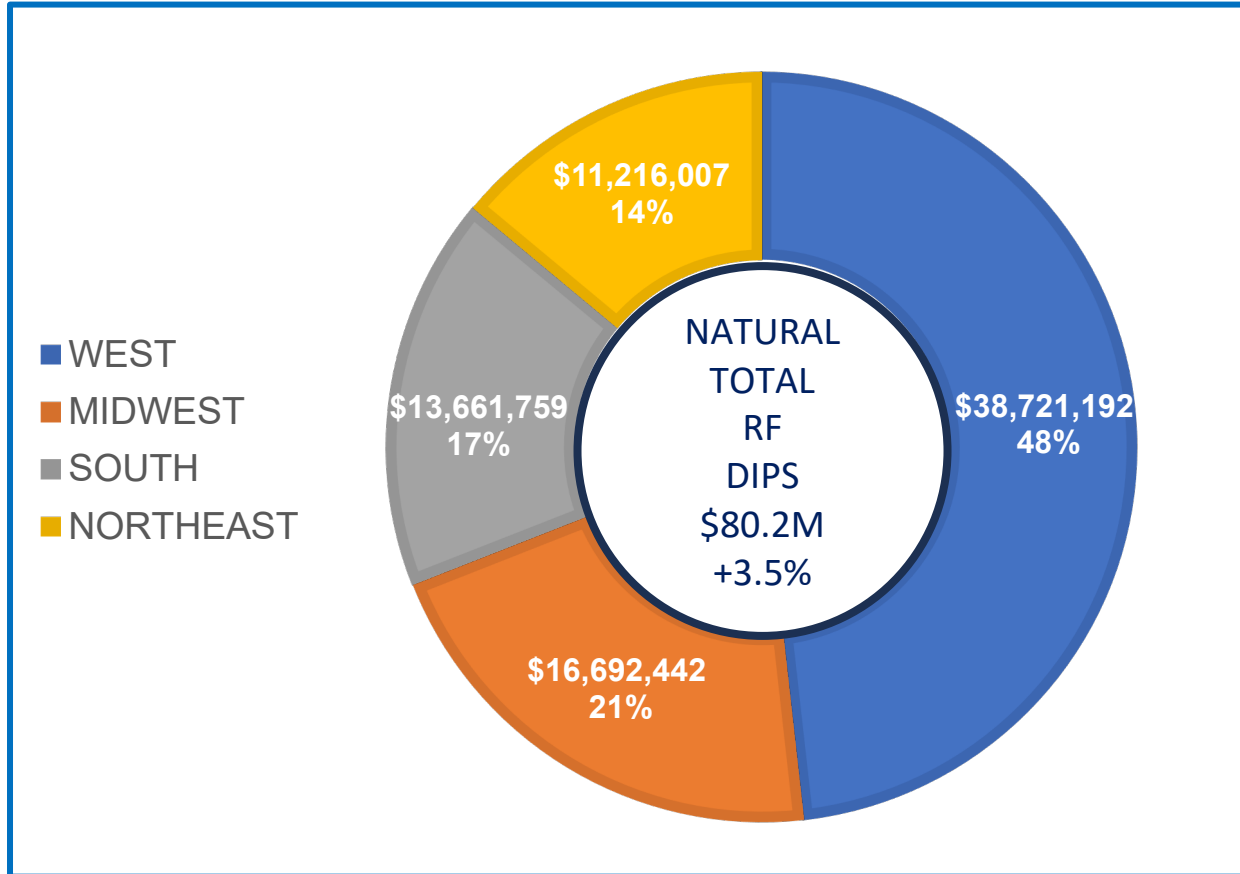
Dollar Change vs Year Ago



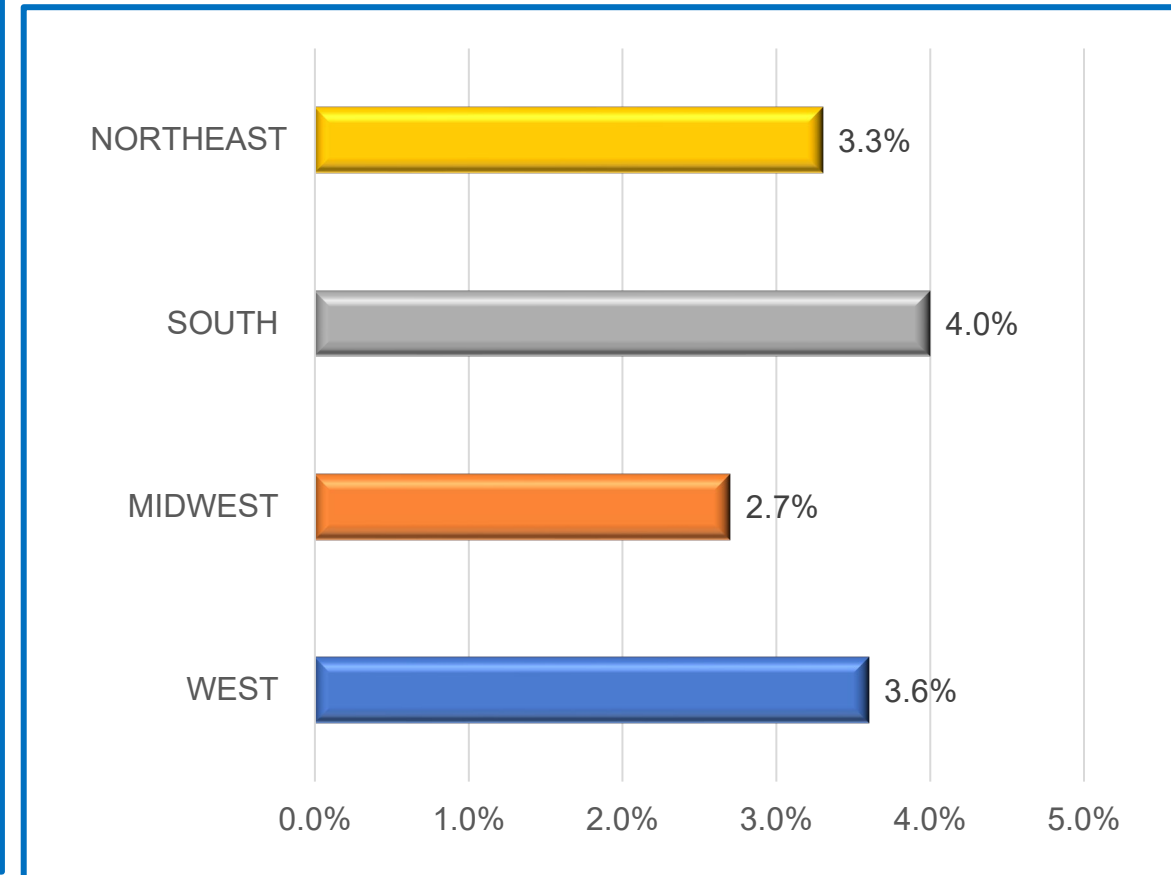
- Total Natural Channel \$ volume for the Refrigerated Dips subcategory is \$80.2M and is up 3.5% over prior year.
- The West region is the largest \$ volume region, followed by the Midwest, South and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

Natural Channel: Refrigerated Dips - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 48% of \$ volume and is up 3.6% over prior year.
- The 3 remaining regions, Northeast, South and Midwest, are responsible for the remaining 52% of \$ volume, with respective growth of 3.3%, 4.0%, and 2.7%. The South experienced the highest % growth among the regions, followed by the West.

Natural Channel: Refrigerated Dips Subcategory Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago
REFRIGERATED SALSAS & DIPS	\$33,280,228	\$32,414,299	2.7	6,310,490	6,222,393	1.4			5.27	5.21
RF DIPS	\$11,216,007	\$10,854,324	3.3	1,963,583	1,894,887	3.6			5.71	5.73
WHOLLY	\$867,165	\$811,029	6.9	155,187	145,126	6.9	35.7	4.4	5.59	5.59
YUCATAN	\$796,731	\$797,237	-0.1	112,063	112,152	-0.1	34	2.2	7.11	7.11
SABRA	\$758,608	\$1,002,843	-24.4	108,005	138,012	-21.7	49.2	2.6	7.02	7.27
BITCHIN SAUCE	\$750,379	\$731,746	2.5	129,497	119,678	8.2	59.9	4.1	5.79	6.11
CEDARS	\$625,349	\$693,866	-9.9	129,924	146,772	-11.5	58.1	2.7	4.81	4.73
ESTI	\$595,447	\$622,749	-4.4	106,788	116,424	-8.3	58.4	3.5	5.58	5.35
NOBRAND	\$561,799	\$540,845	3.9	63,200	56,106	12.6	14.2	1.7	8.89	9.64
HELUVA GOOD	\$413,261	\$368,481	12.2	138,875	119,591	16.1	55.5	2.6	2.98	3.08
GOODFOODS	\$400,901	\$458,498	-12.6	71,983	80,840	-11	22.5	4.2	5.57	5.67
CINDYS KITCHEN	\$400,596	\$368,301	8.8	74,471	70,807	5.2	33.7	4.2	5.38	5.2

- Natural Channel, Northeast Natural Channels, is showing 3.3% growth over prior year in \$ sales and is also positive in unit sales, at 3.6%.
- Wholly is the largest \$ volume brand, garnering 8% of the subcategory \$ sales.
- Heluva Good, the 8th largest brand in \$ volume, is the highest growth brand in the subcategory at +12.2%..

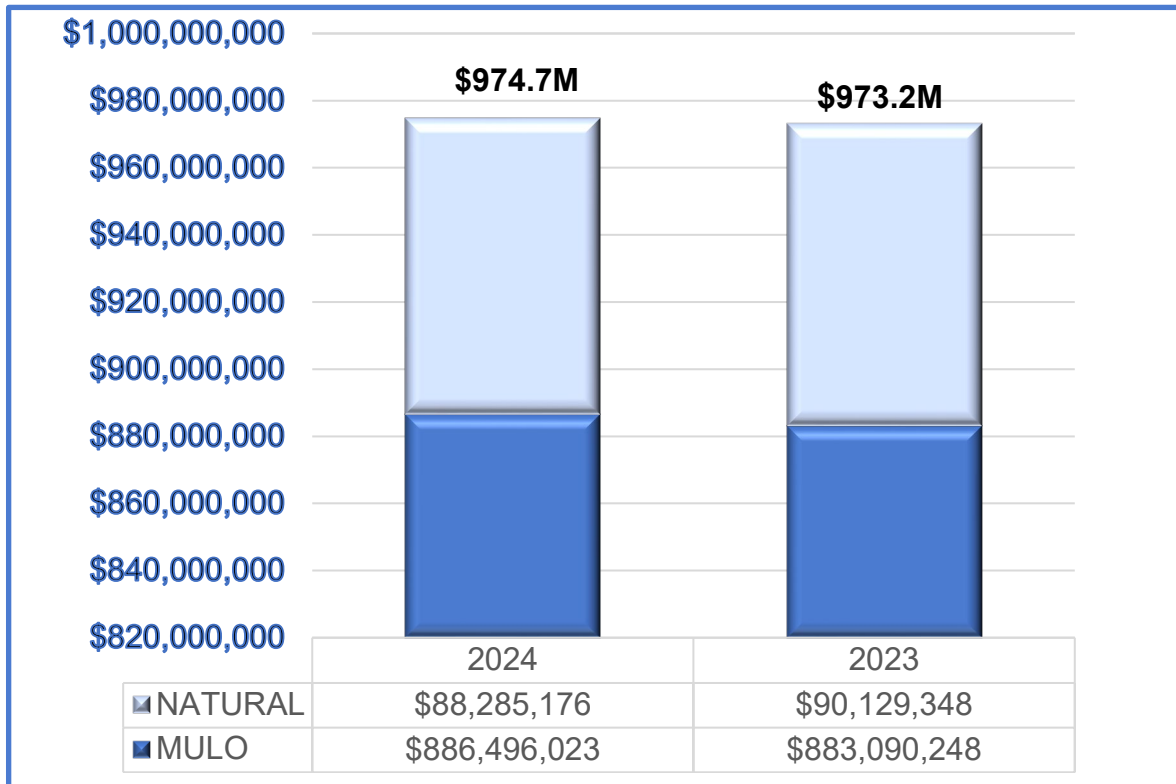
Refrigerated Hummus

Sub-category Performance

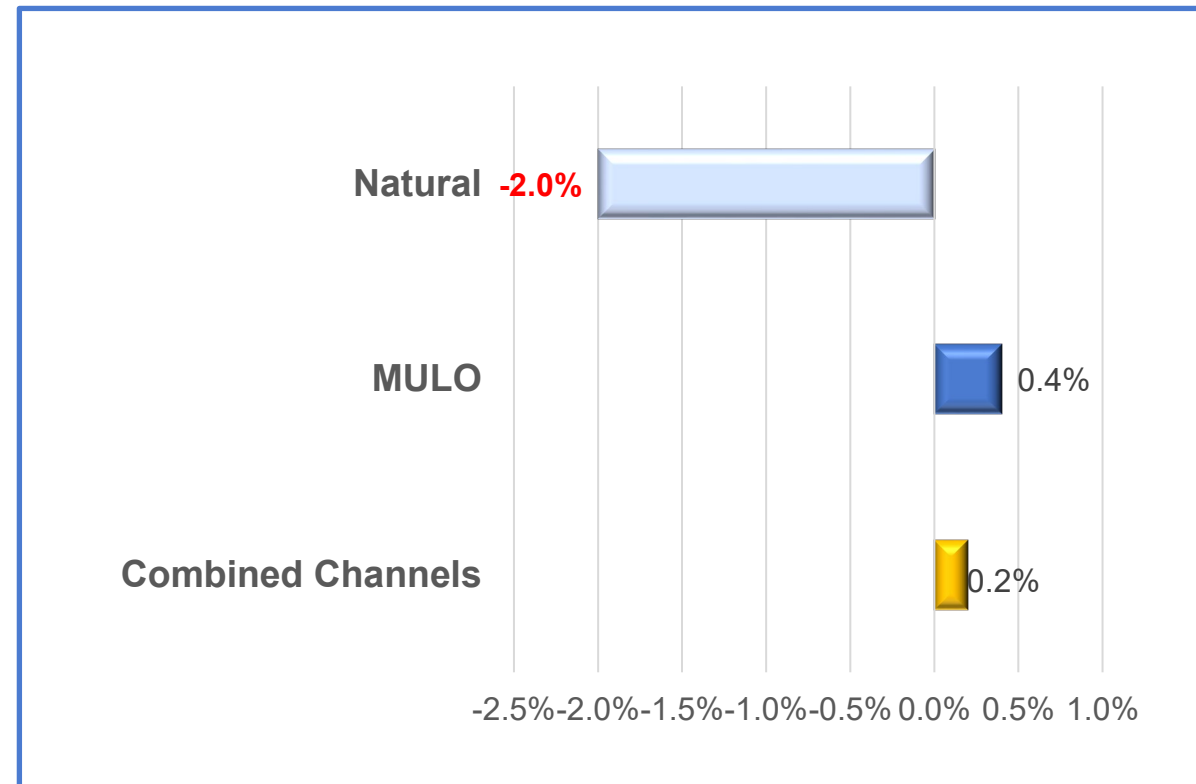
SPINS Satori - 52 Weeks Ending December 29, 2024

Total US Refrigerated Hummus Subcategory

Total US Dollars



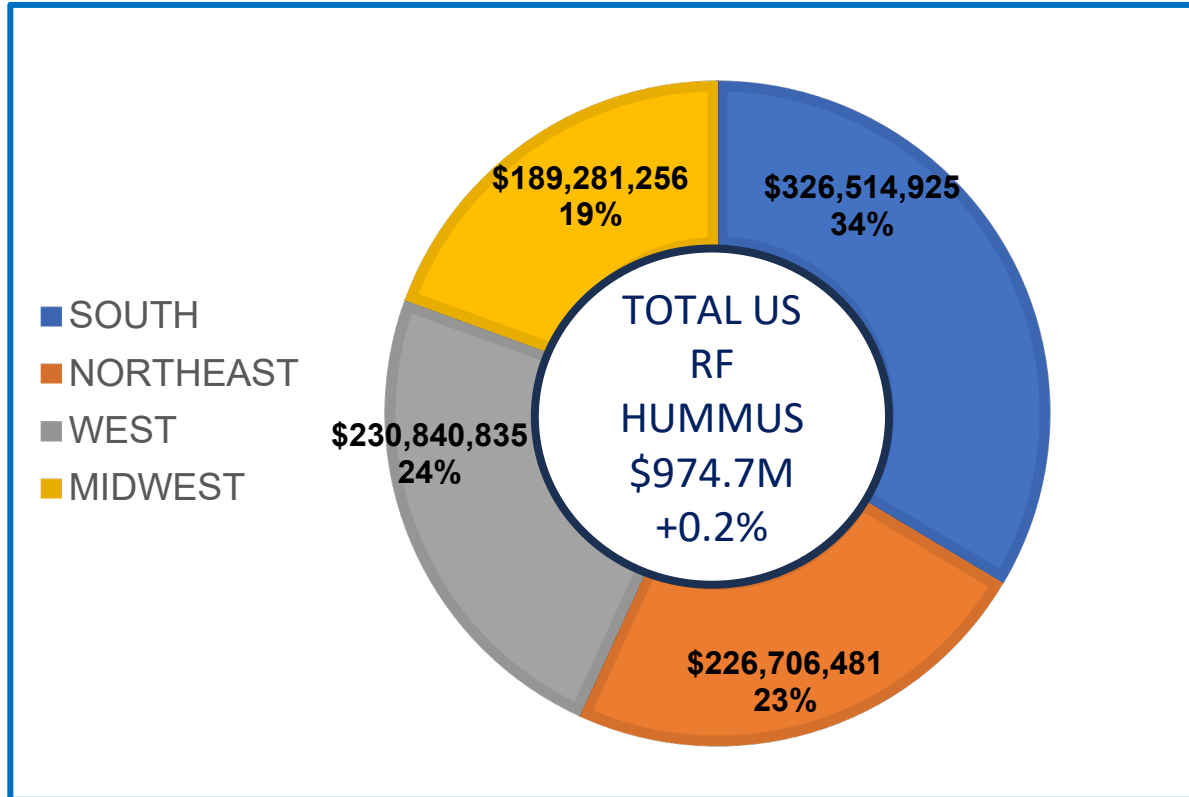
% Dollar Change vs Year Ago



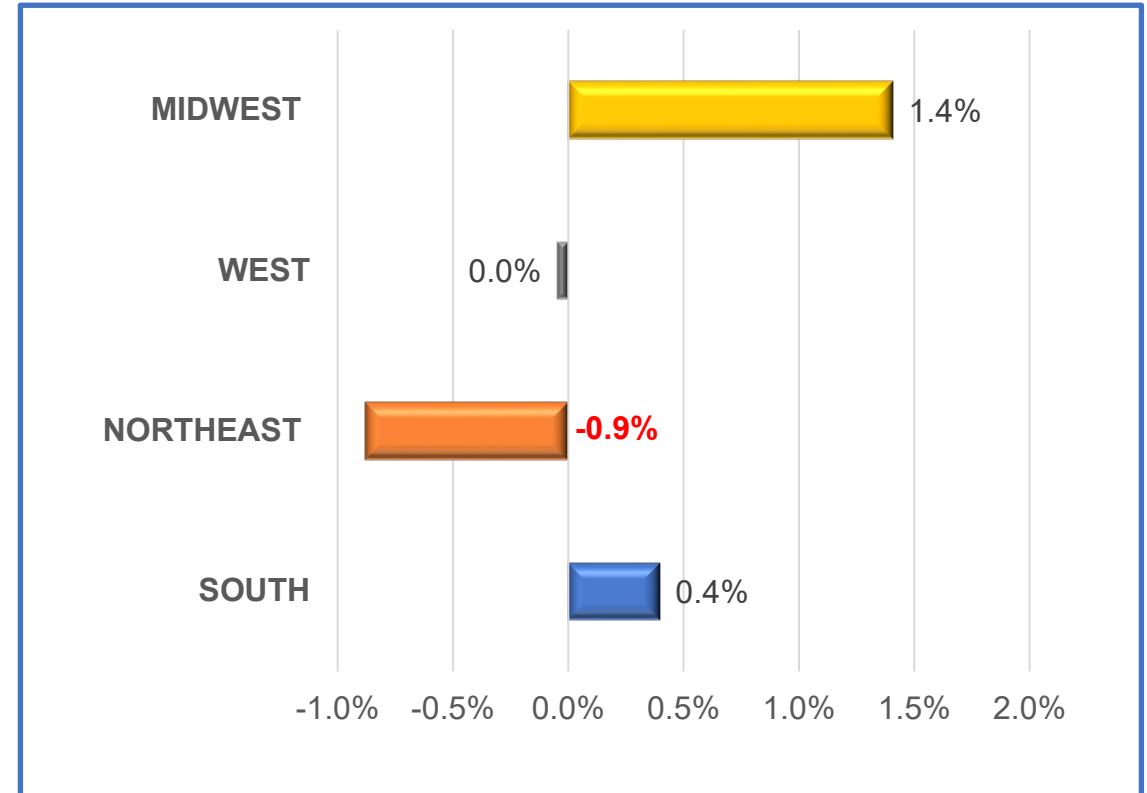
- Total US Refrigerated Hummus is a \$974.7M Category and is in slight growth to prior year by +0.2%%.
- Sales dollars were in decline in the Natural Channel (-2.0%) with only slight growth in MULO, +0.4%.

Total Refrigerated Hummus - By Region

Total Dollars and % Category Share by Region



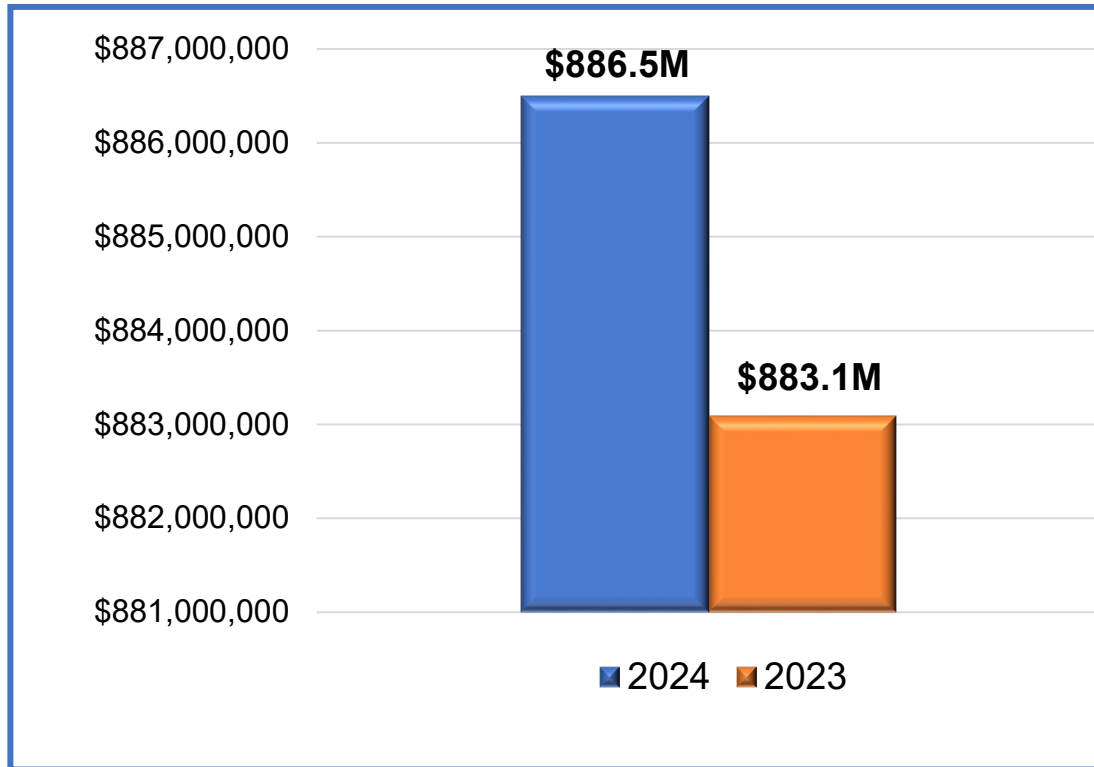
% Dollar Change vs Year Ago



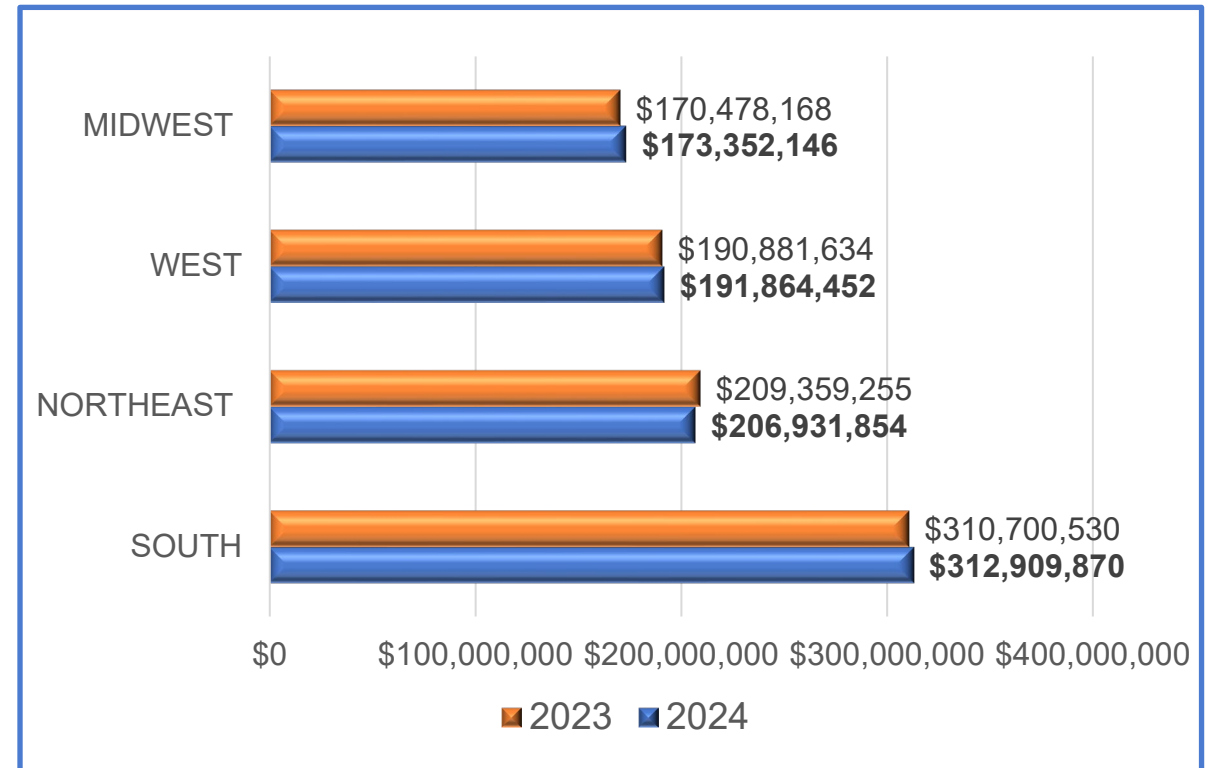
- The South region is the most highly developed region for this sub-category, responsible for 34% of \$ volume and is showing slight \$ volume growth to prior year, 0.4%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining \$ volume with respective growth/decline, 0.0%, -0.9 % and +1.4%.

Total US MULO: Refrigerated Hummus Subcategory

MULO Total US Dollars



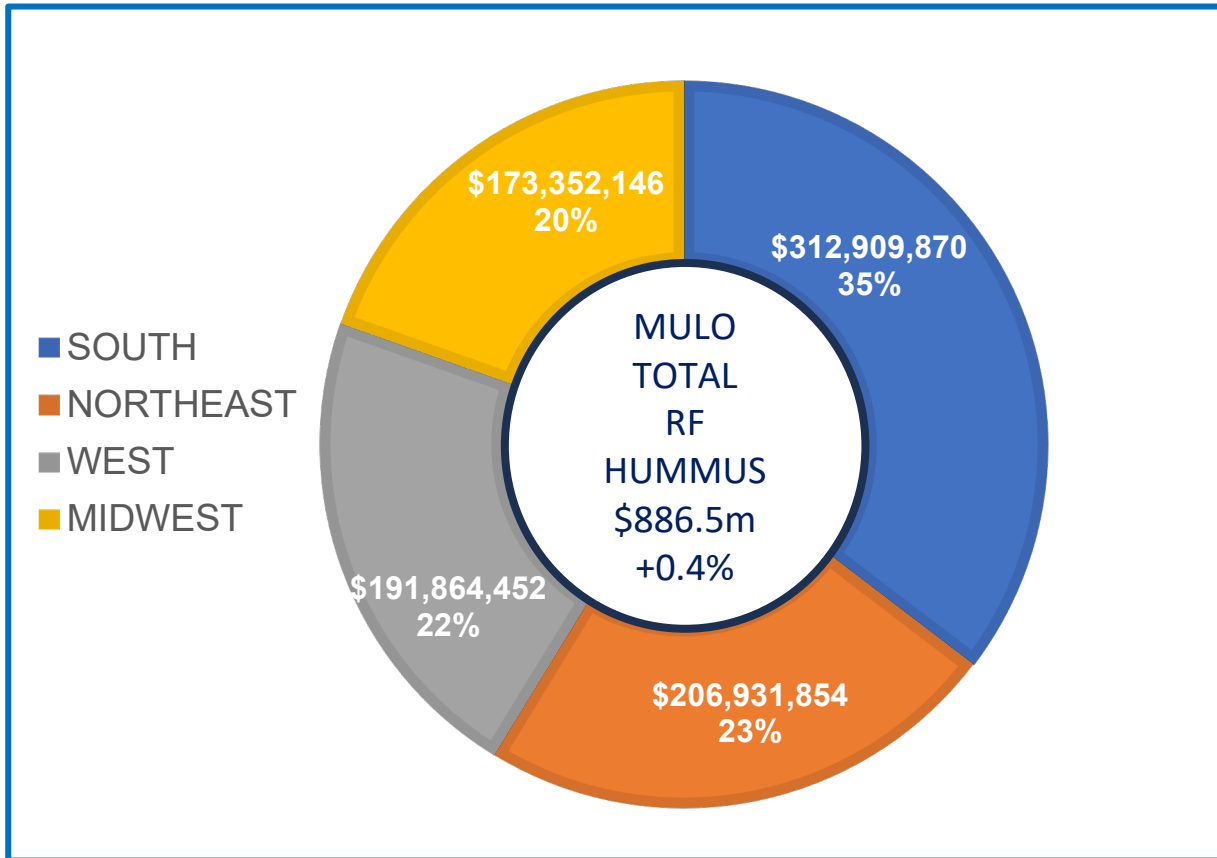
Dollar Change vs Year Ago



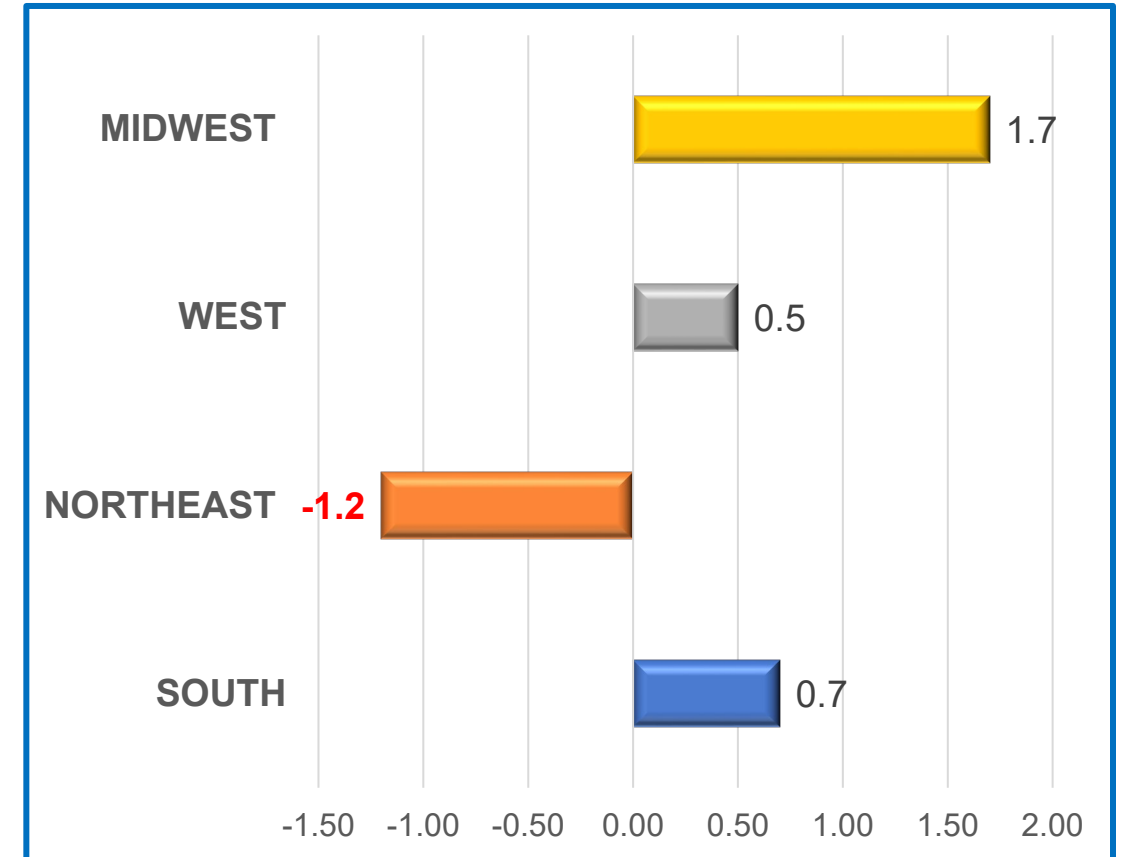
- Total US MULO \$ volume Refrigerated Hummus is \$886.5M and is slightly growing in dollar volume to PY by 0.2%.
- The South region is the largest \$ volume region, followed by Northeast, West and Midwest, respectively.
- 3 census regions and Total US are posting \$ sales that are greater than prior year, Northeast is in decline -1.2%.

MULO: Refrigerated Hummus Subcategory

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 35% of \$ volume with growth of 0.7%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 65%; all are showing slight dollar growth to prior year, except the Northeast, which is in decline by -1.2%.

MULO: Refrigerated Hummus

Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars %		Units %		Avg % ACV	Average Items Selling	ARP	ARP, Yago
			Chg, Yago	Units	Units, Yago	Chg, Yago				
REFRIGERATED SALSAS & DIPS	\$573,601,808	\$554,654,361	3.4	141,647,853	138,265,451	2.4			4.05	4.01
RF HUMMUS	\$206,931,854	\$209,359,255	-1.2	53,375,556	54,607,685	-2.3			3.88	3.83
PRIVATE LABEL	\$66,358,400	\$64,924,295	2.2	20,224,216	20,042,136	0.9	72.7	12.9	3.28	3.24
SABRA	\$53,989,192	\$53,505,015	0.9	11,247,451	11,118,938	1.2	68.9	9.2	4.8	4.81
CEDARS	\$29,527,342	\$31,763,382	-7	8,076,530	8,856,028	-8.8	45.4	11.5	3.66	3.59
JOSEPHS	\$14,612,613	\$15,547,105	-6	3,902,349	4,159,235	-6.2	11.7	17.8	3.74	3.74
ITHACA	\$12,271,541	\$10,754,984	14.1	2,363,759	1,934,758	22.2	36.7	6.3	5.19	5.56
BOARS HEAD	\$10,028,051	\$8,870,028	13.1	2,227,821	1,963,503	13.5	26.1	8.9	4.5	4.52
PRIVATE LABEL ORGANIC	\$5,565,022	\$8,159,076	-31.8	1,753,880	2,559,871	-31.5	30.3	2.6	3.17	3.19
ESTI	\$5,153,927	\$5,038,285	2.3	1,175,917	1,154,483	1.9	17.3	8.3	4.38	4.36
FRESH CRAVINGS	\$3,689,542	\$3,790,906	-2.7	924,477	992,228	-6.8	15.5	10.8	3.99	3.82
TRIBE HUMMUS	\$2,072,411	\$2,972,730	-30.3	703,426	898,548	-21.7	11.5	2.7	2.95	3.31

- Refrigerated Hummus, the 2nd largest subcategory in Northeast MULO, is in decline -1.2% in \$ volume over prior year and is in larger decline in unit volume, at -2.3%.
- Private Label is the leading brand within this subcategory in the Northeast, with \$66.3M in \$ volume, growing +2.2%, and is also growing in unit volume at +0.9%.
- Sabra, ranking 2nd in this subcategory in overall \$ volume, is registering 0.9% growth and is showing a 1.2% increase in unit volume, year over year.

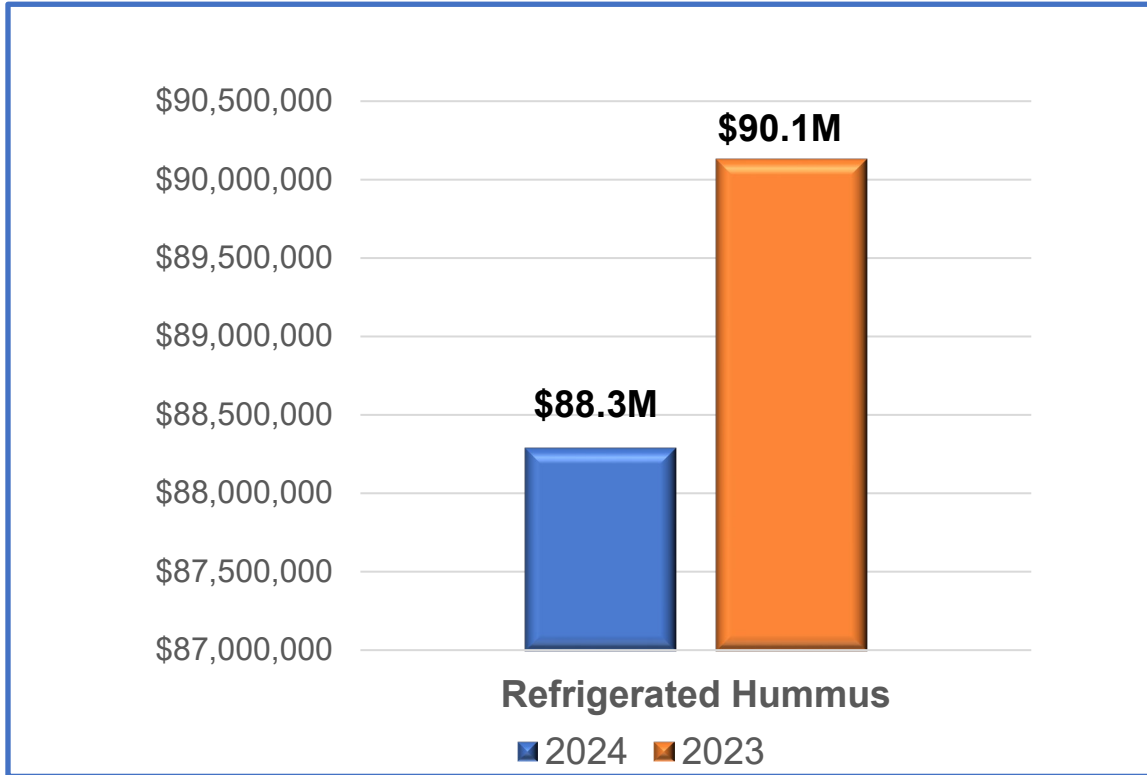
MULO: Refrigerated Hummus Top Markets Northeast Census Region

Geography	Description	Dollars			Units			TDP	TDP, Yago	ARP	ARP, Yago
		Dollars	Dollars, Yago	% Chg, Yago	Units	Units, Yago	% Chg, Yago				
NEW YORK, NY - MULO	RF HUMMUS	\$57,588,778	\$57,855,501	-0.5	13,631,129	13,942,090	-2.2	3607.2	3594.4	4.22	4.15
BOSTON, MA - MULO	RF HUMMUS	\$30,787,359	\$31,491,095	-2.2	8,222,646	8,443,668	-2.6	4411.4	4412.2	3.74	3.73
NEW ENGLAND - MULO	RF HUMMUS	\$23,088,583	\$23,978,183	-3.7	5,828,258	6,021,907	-3.2	4261.7	4385.4	3.96	3.98
PHILADELPHIA, PA - MULO	RF HUMMUS	\$22,598,305	\$22,967,841	-1.6	5,944,096	6,119,845	-2.9	3141.8	3159.3	3.8	3.75
HARTFORD, CT/SPRINGFIELD, MA - MULO	RF HUMMUS	\$14,431,032	\$14,656,690	-1.5	3,584,664	3,672,592	-2.4	3790.7	3712.8	4.03	3.99
HARRISBURG/SCRANTON, PA - MULO	RF HUMMUS	\$11,586,478	\$11,479,366	0.9	3,152,403	3,205,058	-1.6	2589	2658.8	3.68	3.58
BUFFALO/ROCHESTER, NY - MULO	RF HUMMUS	\$10,110,343	\$9,939,196	1.7	3,148,857	3,136,689	0.4	2955.2	2917.2	3.21	3.17
PITTSBURGH, PA - MULO	RF HUMMUS	\$6,551,876	\$6,467,305	1.3	1,855,099	1,880,690	-1.4	1693.4	1572.2	3.53	3.44
ALBANY, NY - MULO	RF HUMMUS	\$5,379,763	\$5,496,198	-2.1	1,263,058	1,339,559	-5.7	3392.3	3475.9	4.26	4.1
PROVIDENCE, RI - MULO	RF HUMMUS	\$4,546,385	\$4,589,948	-0.9	1,183,037	1,189,498	-0.5	3806	3749	3.84	3.86
SYRACUSE, NY - MULO	RF HUMMUS	\$4,143,172	\$4,191,391	-1.2	1,173,108	1,209,393	-3	2873.9	2920.7	3.53	3.47

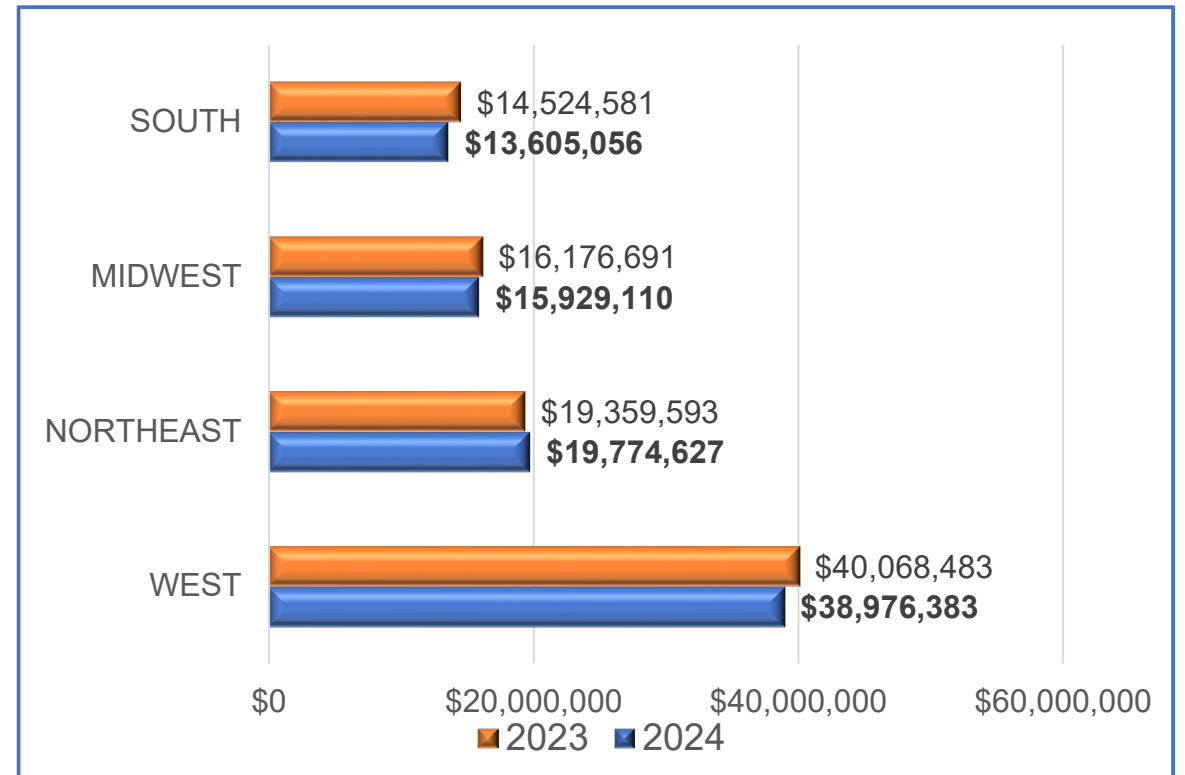
- New York is the largest market for Refrigerated Hummus, posting negative \$ sales growth of -0.45% and decrease in unit growth of -2.2%.
- New England, the 3rd largest market, is responsible for \$23.0M in sales, and is showing dollar decline of -3.7% and unit decline of -3.2%.
- Buffalo/Rochester, the 7th largest market, is showing the greatest dollar & unit sales increase of all markets in the Northeast.

Natural Channel: Refrigerated Hummus - Subcategory

Natural Channel Total US Dollars



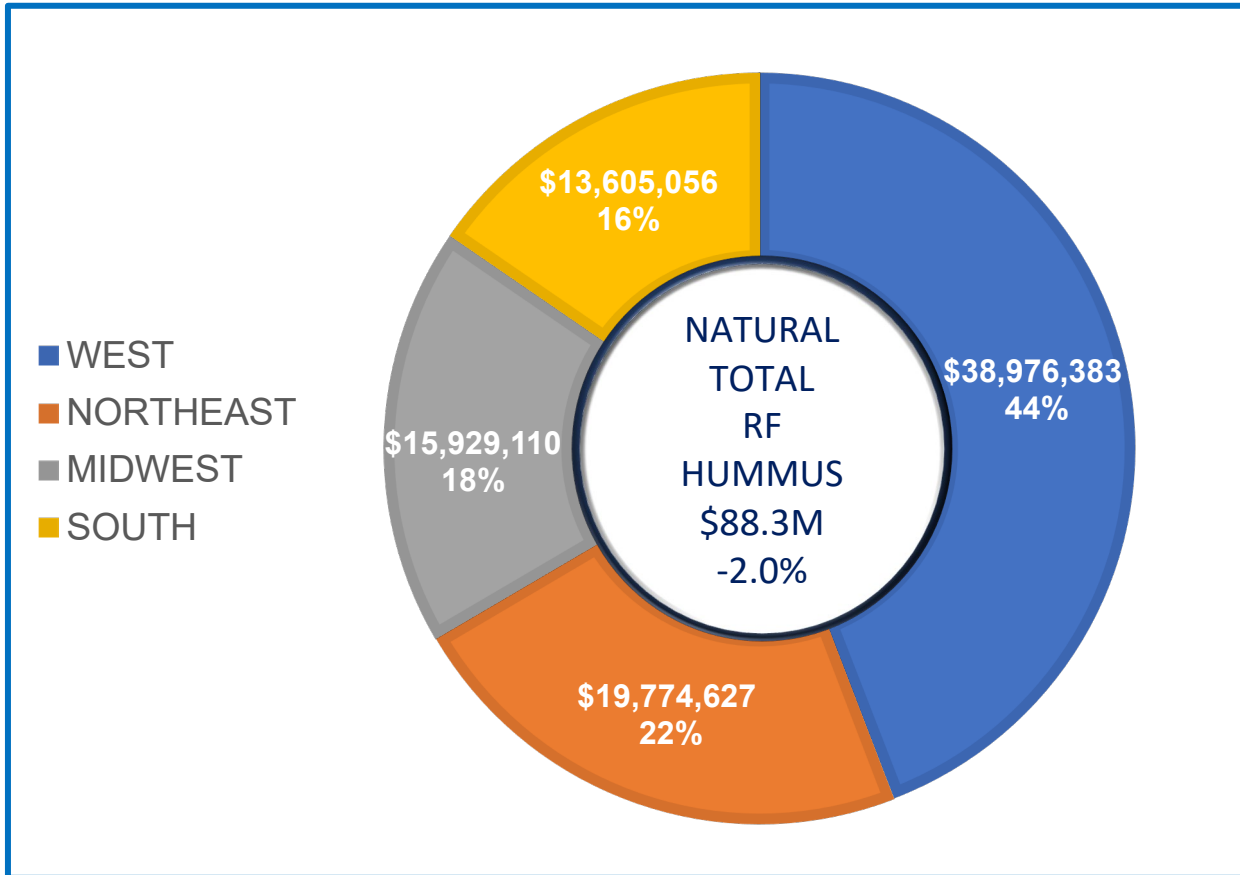
Dollar Change vs Year Ago



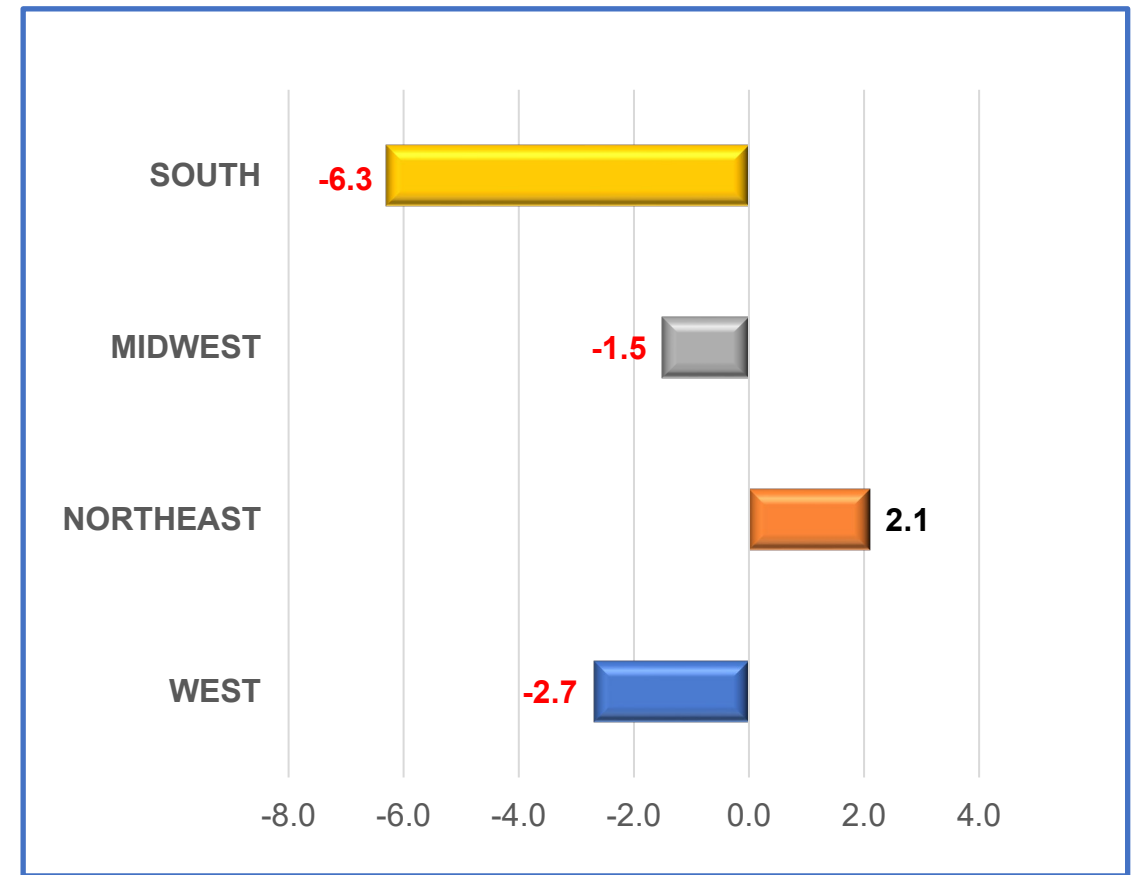
- Total Natural Channel \$ volume for the Refrigerated Hummus subcategory is \$83.8M and is in decline 2.0% over prior year.
- The West region is the largest \$ volume region, followed by the Northeast, Midwest, South, respectively.
- 3 census regions are posting sales that are less than prior year.

Natural Channel: Refrigerated Hummus - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 44% of \$ volume, is in decline to PY, -2.7%.
- The Northeast region, the 2nd largest market, is showing the highest \$ growth at 2.1%.
- The 2 remaining regions, South, Midwest with respective declines of -6.1% and -1.5%.

Natural Channel: Refrigerated Hummus Top 10 Brands Northeast Census Region

Description	Dollars,		Dollars %	Units,		Units %	Avg %	Average	Weight	ARP,	
	Dollars	Yago	Chg, Yago	Units	Yago	Chg, Yago	ACV	Items Selling	Weeks, Yago	ARP	Yago
REFRIGERATED SALSAS & DIPS	\$33,280,228	\$32,414,299	2.7	6,310,490	6,222,393	1.4				5.27	5.21
RF HUMMUS	\$19,774,627	\$19,359,593	2.1	3,932,809	3,930,875	0				5.03	4.93
SABRA	\$3,547,619	\$4,007,736	-11.5	598,861	667,183	-10.2	62.2	8.9	32.2	5.92	6.01
CEDARS	\$3,340,749	\$3,639,430	-8.2	811,604	911,301	-10.9	68.2	10.3	36.6	4.12	3.99
ITHACA	\$3,013,957	\$2,328,614	29.4	628,632	477,339	31.7	54.1	6.9	25.5	4.79	4.88
ESTI	\$1,909,011	\$1,865,330	2.3	348,058	352,347	-1.2	60.5	7.4	30.8	5.48	5.29
YALLA VERMONT	\$1,534,173	\$1,036,998	47.9	235,359	162,508	44.8	14.3	3.4	4.7	6.52	6.38
BOARS HEAD	\$796,229	\$737,636	7.9	171,970	166,164	3.5	51.9	7.2	27	4.63	4.44
PRIVATE LABEL	\$700,886	\$810,417	-13.5	141,739	167,175	-15.2	27.8	3.2	14.7	4.94	4.85
LITTLE SESAME	\$698,802	\$285,707	144.6	132,793	51,197	159.4	28.6	4.2	8.3	5.26	5.58
HOLY HUMMUS	\$691,152	\$627,210	10.2	119,260	104,362	14.3	12.2	10.7	6	5.8	6.01
PRIVATE LABEL ORGANIC	\$584,335	\$537,383	8.7	121,645	110,241	10.3	17.5	7.4	9.3	4.8	4.87

- Refrigerated Hummus, the 2nd largest subcategory in the Natural Channel, is growing at 2.1% in \$ volume to prior year in the Northeast but is flat in unit volume.
- Sabra is the leading brand within this segment with \$3.5M, however, \$ volume is declining -11.5%, and unit volume is off by -10.2%.
- Ithaca hummus and Yalla Vermont are showing significant gains in both \$ and unit volumes.
- 8th ranked Little Sesame brand is showing a large % increase in \$ volume, +144.6%, and a higher increase in unit volume at 159.4%.

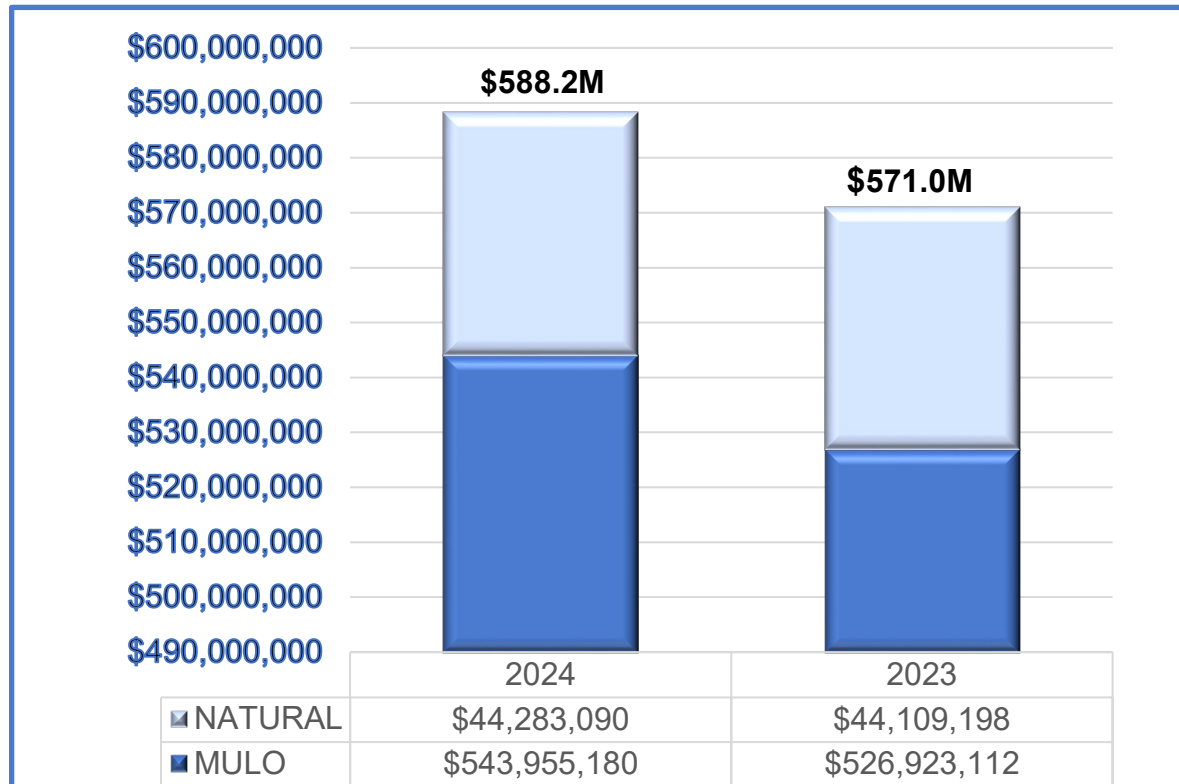
Refrigerated Salsas

Sub-category Performance

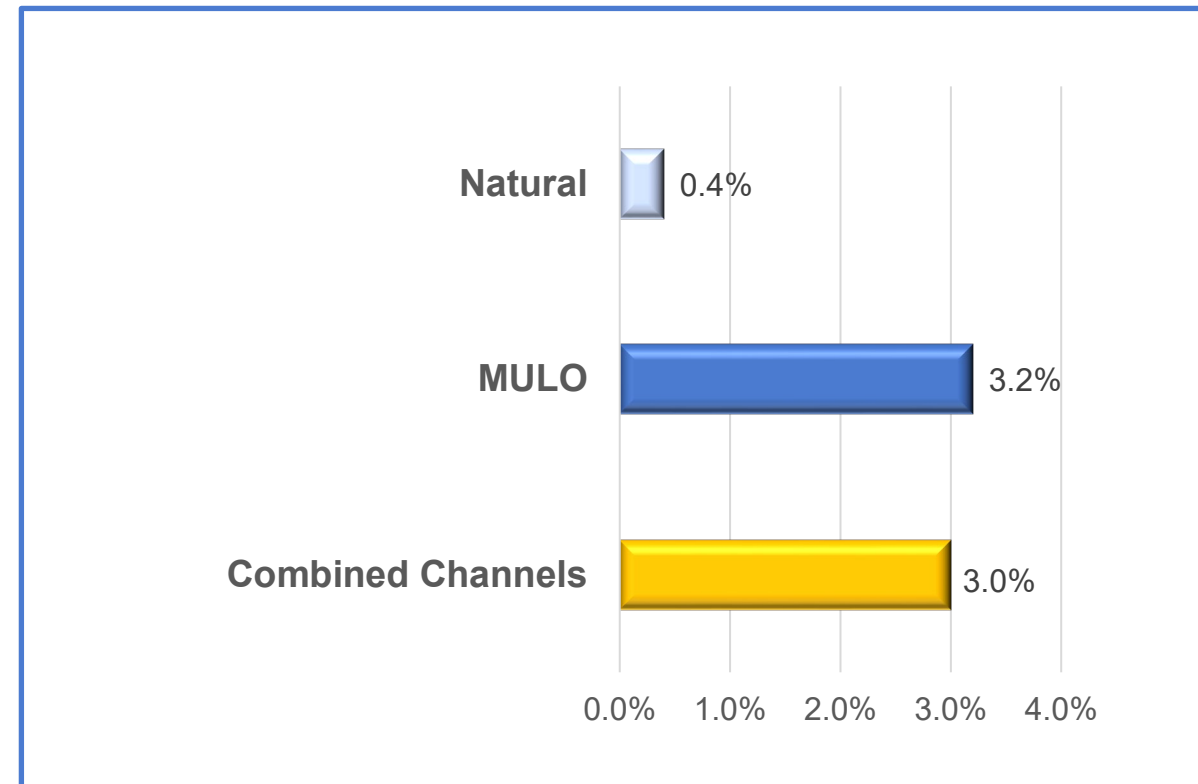
SPINS Satori - 52 Weeks Ending December 29, 2024

Total US Refrigerated Salsas Subcategory

Total US Dollars



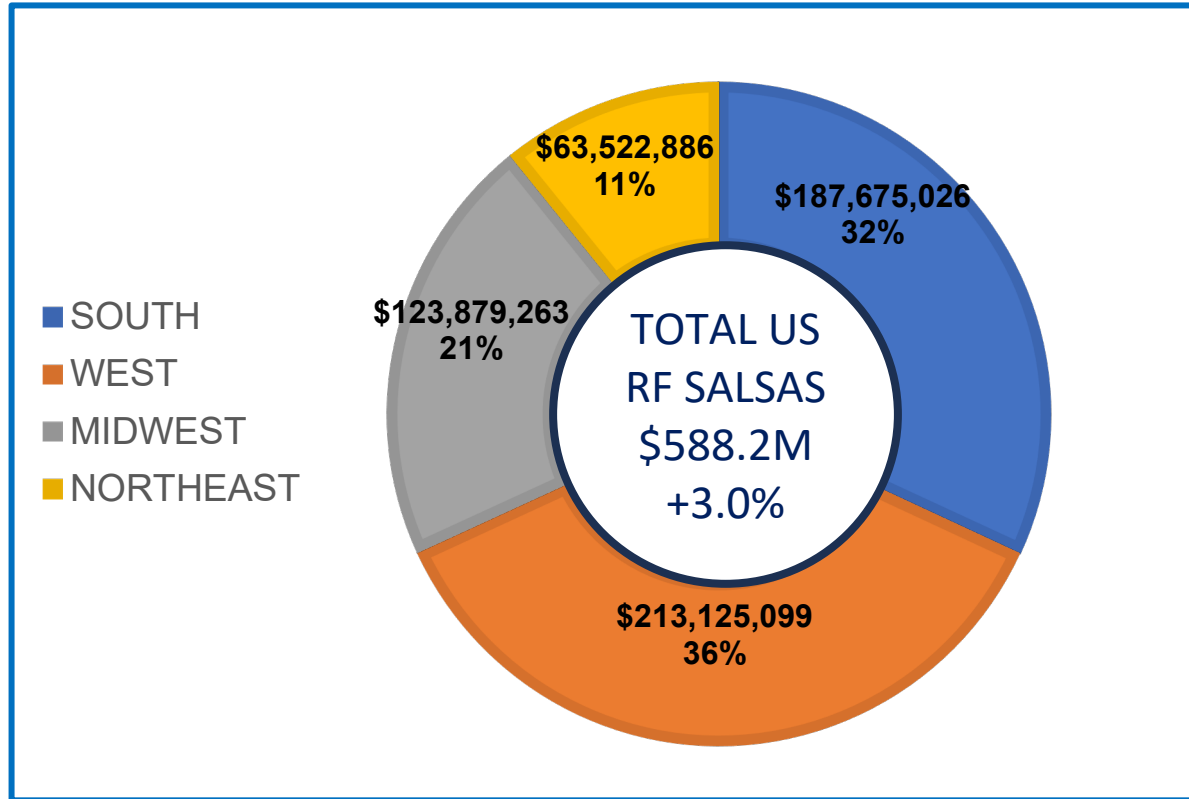
% Dollar Change vs Year Ago



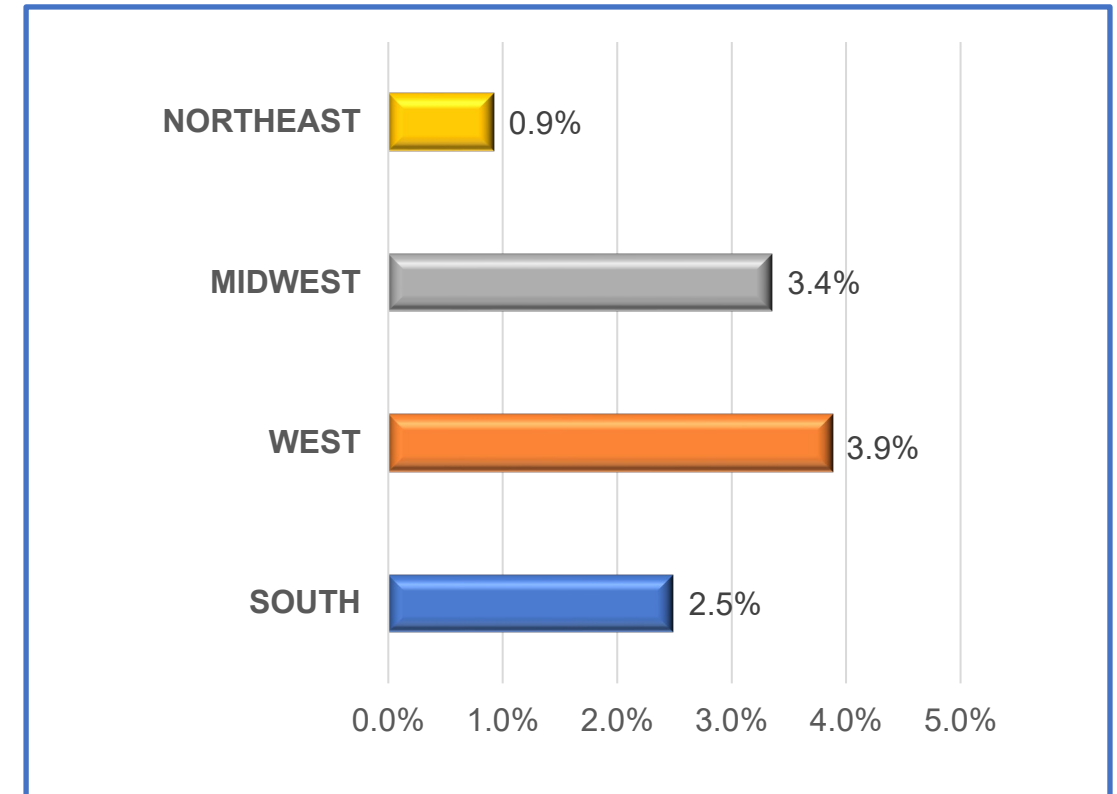
- Total US Refrigerated Salsas is a \$588.2M subcategory with \$ growth to prior year of +3.0%.
- Sales dollars were slightly up the Natural Channel (+0.4%) with lower growth than MULO (+3.2%).

Total US Refrigerated Salsas Subcategory - By Region

Total Dollars and % Category Share by Region



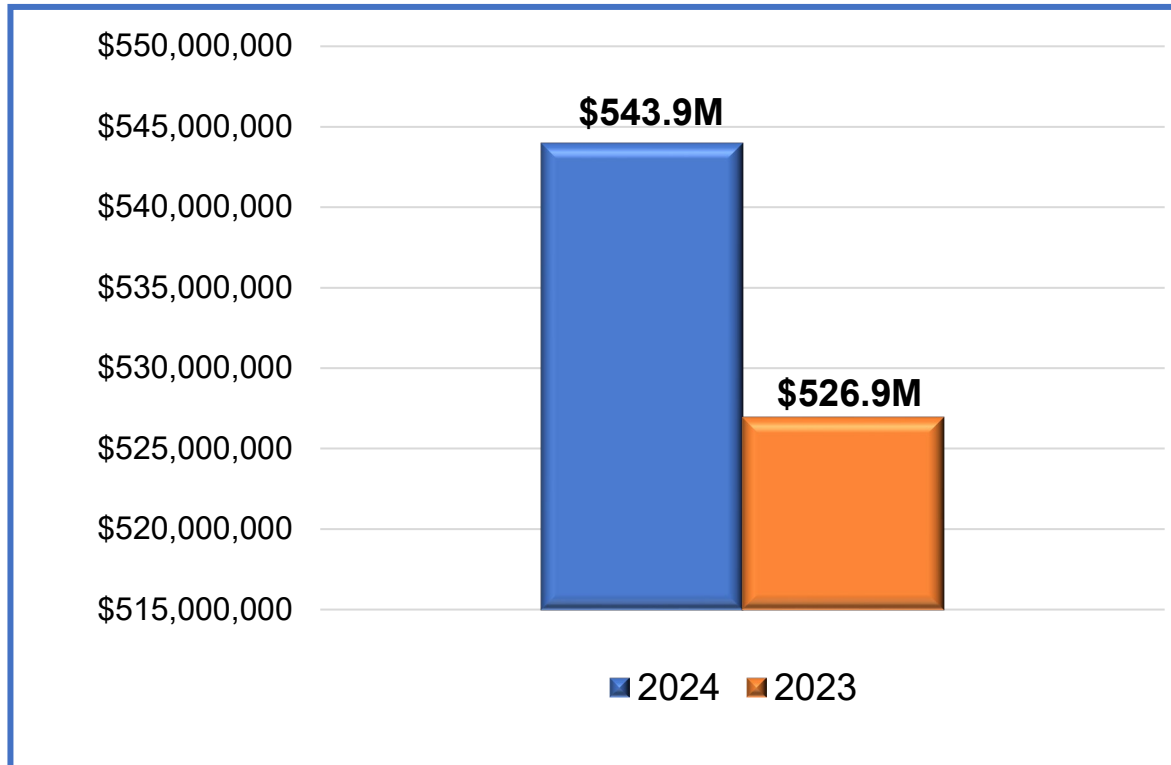
% Dollar Change vs Year Ago



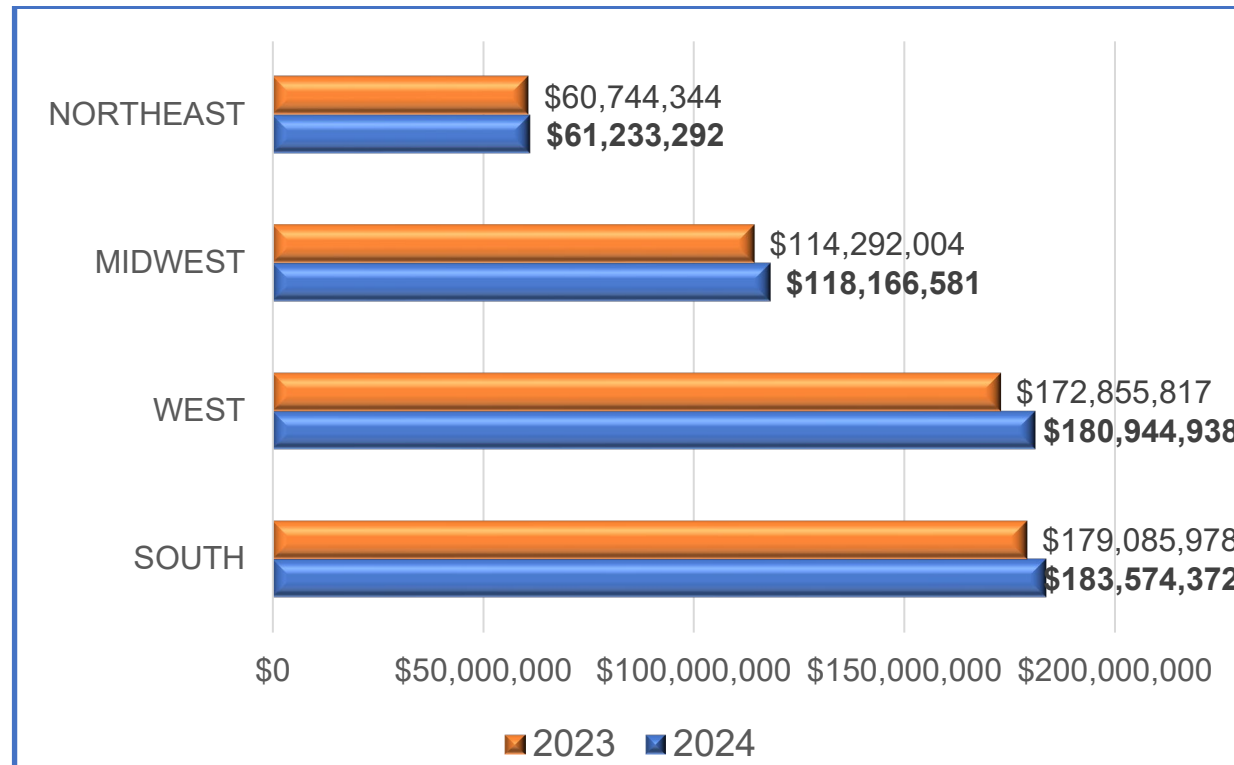
- The Refrigerated Salsas subcategory has experienced dollar growth of 3.0% over prior year and is responsible for \$588.2M.
- The West region is the most highly developed region for this subcategory, responsible for 36% of \$ volume, with growth at +3.9%.
- The 3 remaining regions, South, Northeast and Midwest, are responsible for the remaining 64% of \$ volume, all with \$ growth of 2.5%, 0.9% and 3.4%, respectively.

MULO: Refrigerated Salsas Subcategory

MULO Total US Dollars



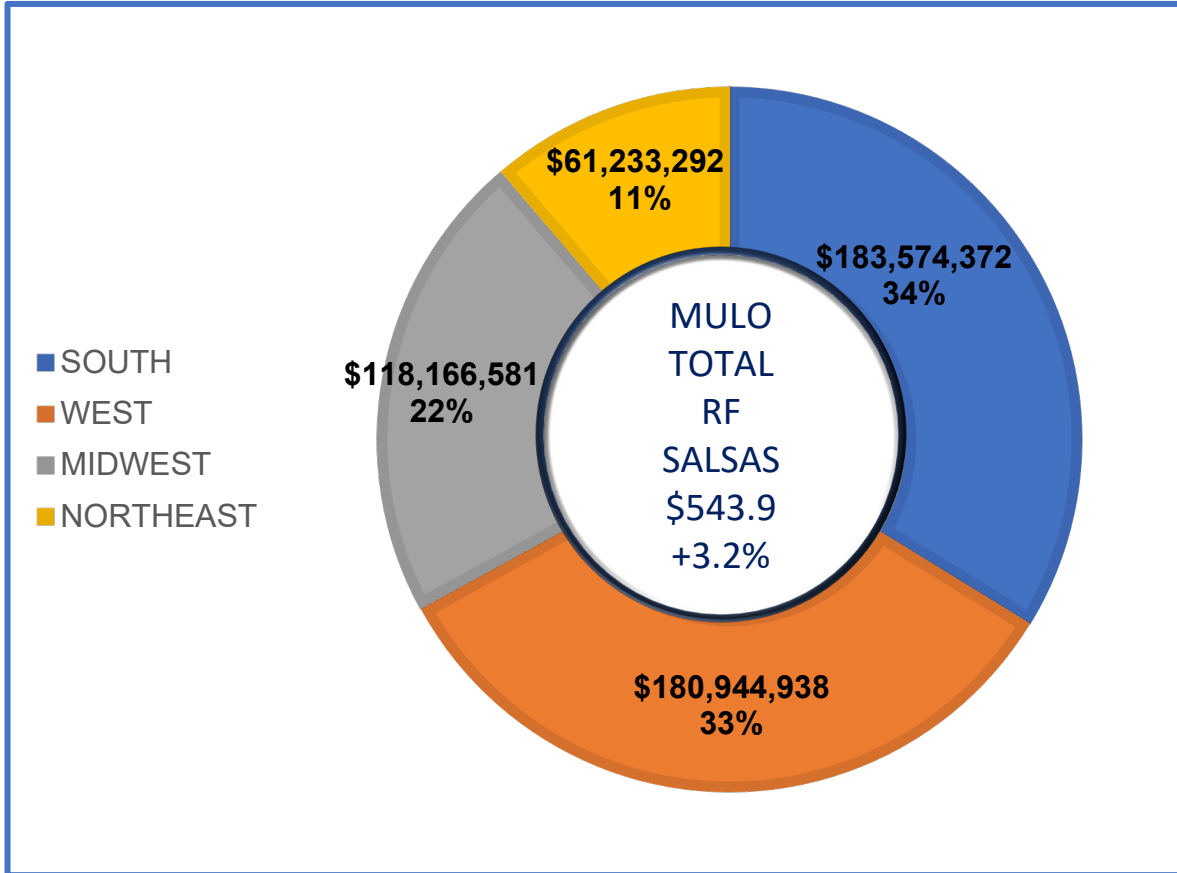
Dollar Change vs Year Ago



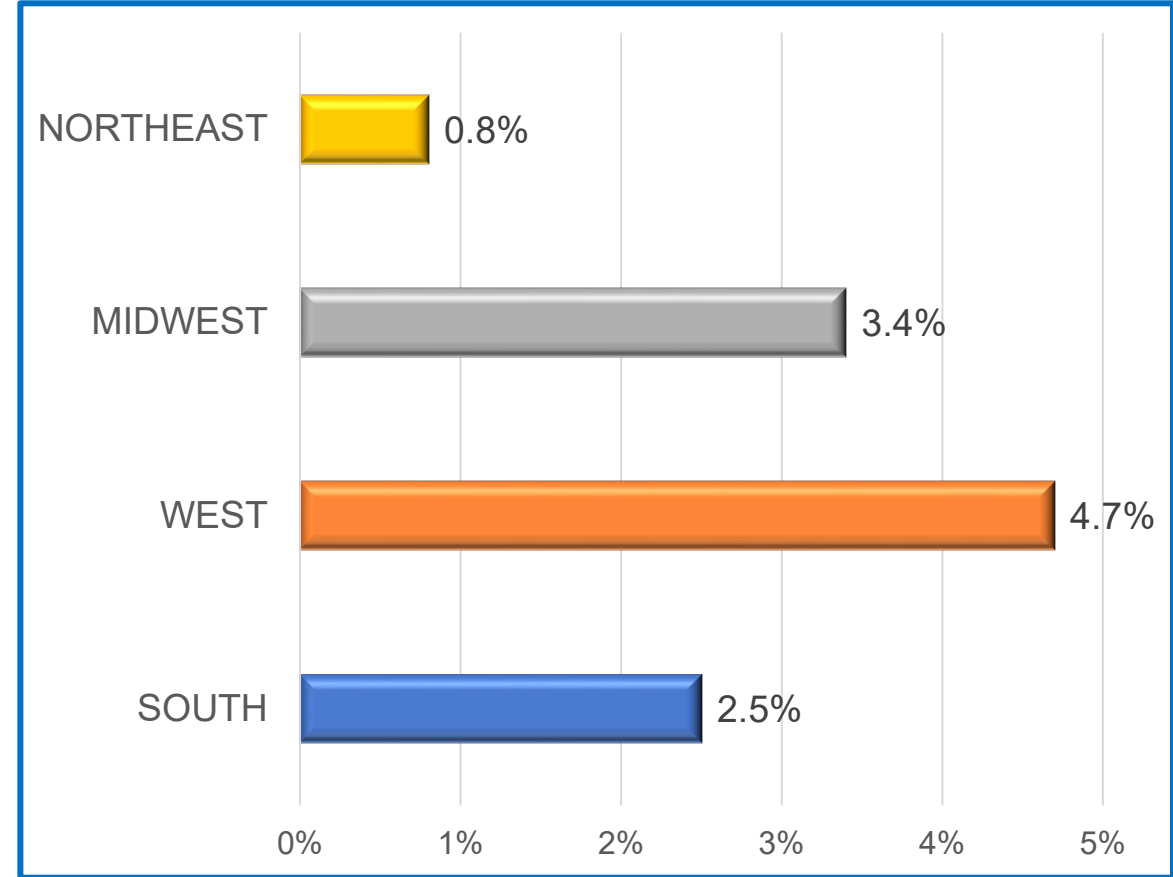
- Total US MULO \$ volume for Refrigerated Salsa is \$543.9M and grew 3.2% over prior year.
- The South region is the largest \$ volume region, followed by, West, Midwest and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

MULO: Refrigerated Salsas Subcategory - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this sub-category, responsible for 34% of \$ volume with growth of 2.5%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 66% of \$ volume with respective growth of 4.7%, 0.8%, and 3.4%.

MULO: Refrigerated Salsas Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago
REFRIGERATED SALSAS & DIPS	\$573,601,808	\$554,654,361	3.4	141,647,853	138,265,451	2.4			4.1	4.0
RF SALSAS	\$61,233,292	\$60,744,344	0.8	13,984,846	14,121,309	-1.0			4.4	4.3
PRIVATE LABEL	\$24,825,602	\$24,679,777	0.6	5,933,634	6,027,725	-1.6	62.5	3.9	4.2	4.1
LA MEXICANA	\$4,617,395	\$3,643,043	26.7	1,009,383	787,917	28.1	21.6	3.6	4.6	4.6
GARDEN FRESH GOURMET	\$4,371,150	\$5,490,450	-20.4	965,433	1,203,710	-19.8	31.5	3.2	4.5	4.6
MITCHELLS FRESH	\$4,221,968	\$4,439,922	-4.9	814,526	843,543	-3.4	18.9	2.7	5.2	5.3
WHOLLY	\$2,829,504	\$3,048,221	-7.2	714,257	764,943	-6.6	45.4	1.0	4.0	4.0
LANCASTER	\$2,126,180	\$1,832,666	16.0	486,388	466,307	4.3	2.0	4.8	4.4	3.9
WILLYS FAMOUS SALSA	\$2,043,396	\$1,597,938	27.9	532,697	425,293	25.3	17.0	3.9	3.8	3.8
FRESH CRAVINGS	\$1,847,209	\$1,356,746	36.1	518,780	396,517	30.8	20.6	4.1	3.6	3.4
F & S PRODUCE	\$1,433,094	\$1,383,180	3.6	297,740	293,389	1.5	12.3	1.0	4.8	4.7
GRILLOS PICKLES	\$1,381,038	\$488,083	183.0	275,245	92,265	198.3	18.0	1.4	5.0	5.3

- The MULO Refrigerated Salsa subcategory represents \$61.2M in \$ volume, at 0.8% over prior year in the Northeast, and is negative in unit volume, at -1.0%.
- Private Label is the #1 brand in the subcategory with \$ volume of \$24.6M at 0.6% growth in \$ volume and -1.6% decline in unit volume.
- La Mexicana is the largest mfg. brand in dollars and has high \$ growth in the subcategory at +26.7% and unit growth of 28.1% .
- Grillo's Pickles, a fast-emerging brand, ranks 10th among the Top 10 Northeast brands and is showing very high growth, +183% \$ volume, and larger growth in unit volume, +198.3%.

MULO: Refrigerated Salsas

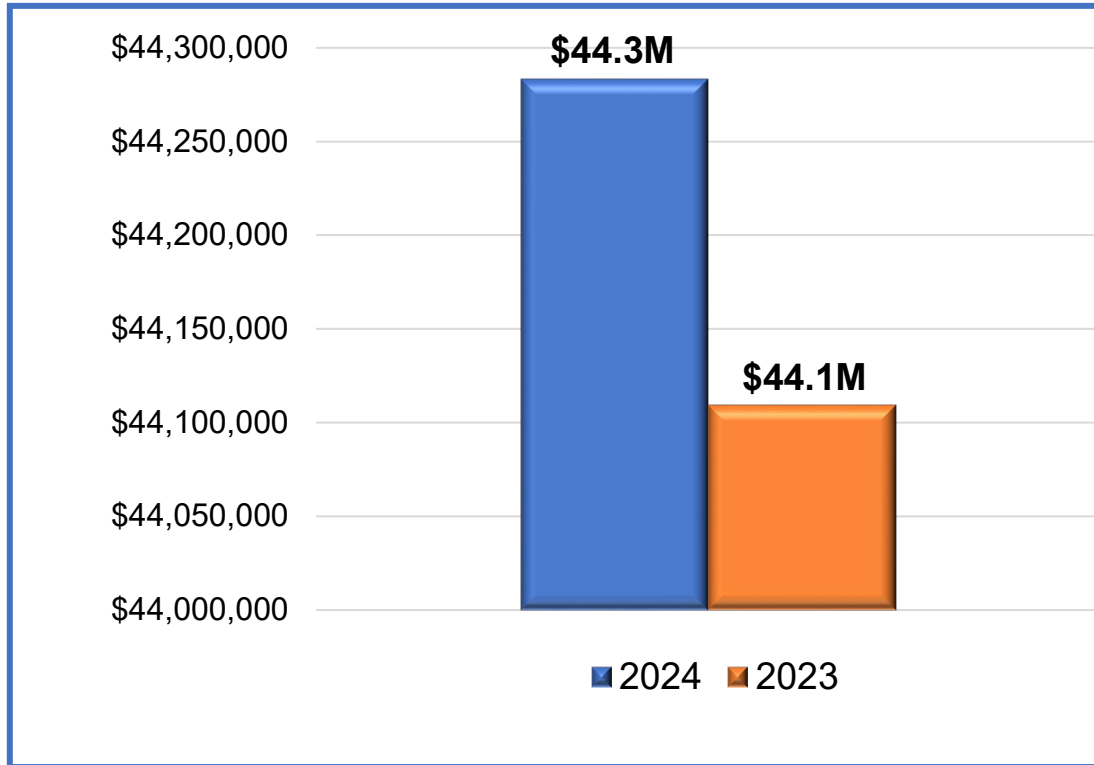
Top Markets Northeast Census Region

Geography	Description	Dollars	Dollars, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units % Chg, Yago	TDP	TDP, Yago	ARP	ARP, Yago
NEW YORK, NY - MULO	RF SALSAS	\$10,824,325	\$10,392,270	4.2	2,390,619	2,379,384	0.5	876.9	774.1	4.53	4.37
PHILADELPHIA, PA - MULO	RF SALSAS	\$9,423,786	\$9,192,867	2.5	2,105,905	2,122,944	-0.8	1111.4	1002	4.47	4.33
NEW ENGLAND - MULO	RF SALSAS	\$6,809,262	\$7,133,911	-4.6	1,529,381	1,559,148	-1.9	1307.2	1289.5	4.45	4.58
BOSTON, MA - MULO	RF SALSAS	\$6,149,475	\$6,071,103	1.3	1,398,756	1,410,285	-0.8	999.3	967	4.4	4.3
HARRISBURG/SCRANTON, PA - MULO	RF SALSAS	\$5,459,975	\$5,212,547	4.7	1,286,801	1,261,553	2	1103.8	1026.8	4.24	4.13
HARTFORD, CT/SPRINGFIELD, MA - MULO	RF SALSAS	\$4,428,122	\$4,369,761	1.3	1,020,416	1,028,759	-0.8	1106.7	1041.9	4.34	4.25
BUFFALO/ROCHESTER, NY - MULO	RF SALSAS	\$3,878,958	\$3,950,175	-1.8	866,379	901,570	-3.9	1054	1148.6	4.48	4.38
PITTSBURGH, PA - MULO	RF SALSAS	\$3,824,780	\$3,917,221	-2.4	935,661	952,085	-1.7	791.5	794	4.09	4.11
ALBANY, NY - MULO	RF SALSAS	\$1,658,231	\$1,684,348	-1.6	374,639	376,506	-0.5	1193.7	1162.3	4.43	4.47
SYRACUSE, NY - MULO	RF SALSAS	\$1,609,703	\$1,634,537	-1.5	370,748	385,769	-3.9	1111.2	1155.1	4.34	4.24
PROVIDENCE, RI - MULO	RF SALSAS	\$1,097,430	\$1,107,589	-0.9	262,302	274,353	-4.4	988.9	974.9	4.18	4.04

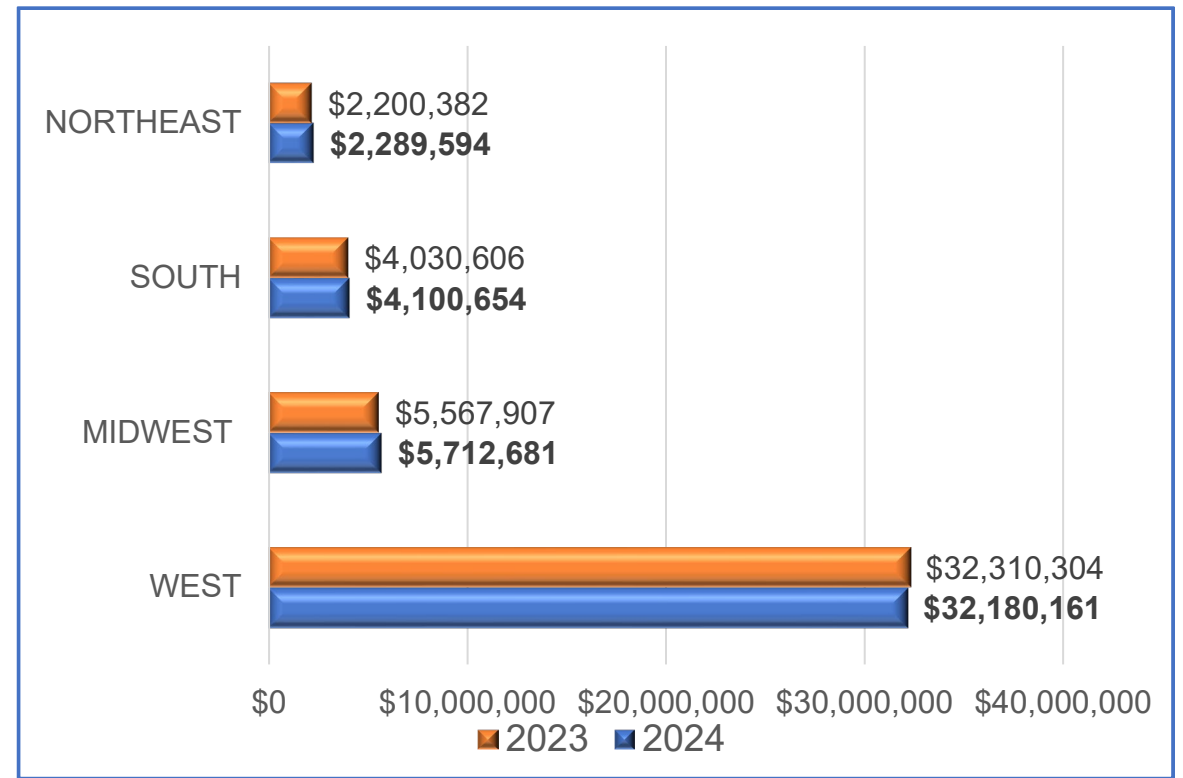
- New York is the largest market for Refrigerated Salsas, posting positive \$ sales growth of +4.2% and is showing a slight increase in unit growth of 0.5%.
- New England, the 3rd largest market responsible for \$6.8M in sales, is showing dollar decline of -4.6%, the largest \$ decline of Northeast markets and unit decline of -1.9.
- Harrisburg/Scranton, the 5th largest market, is achieving the fastest growth on both a dollar and unit basis.

Natural Channel: Refrigerated Salsas Subcategory

Natural Channel Total US Dollars



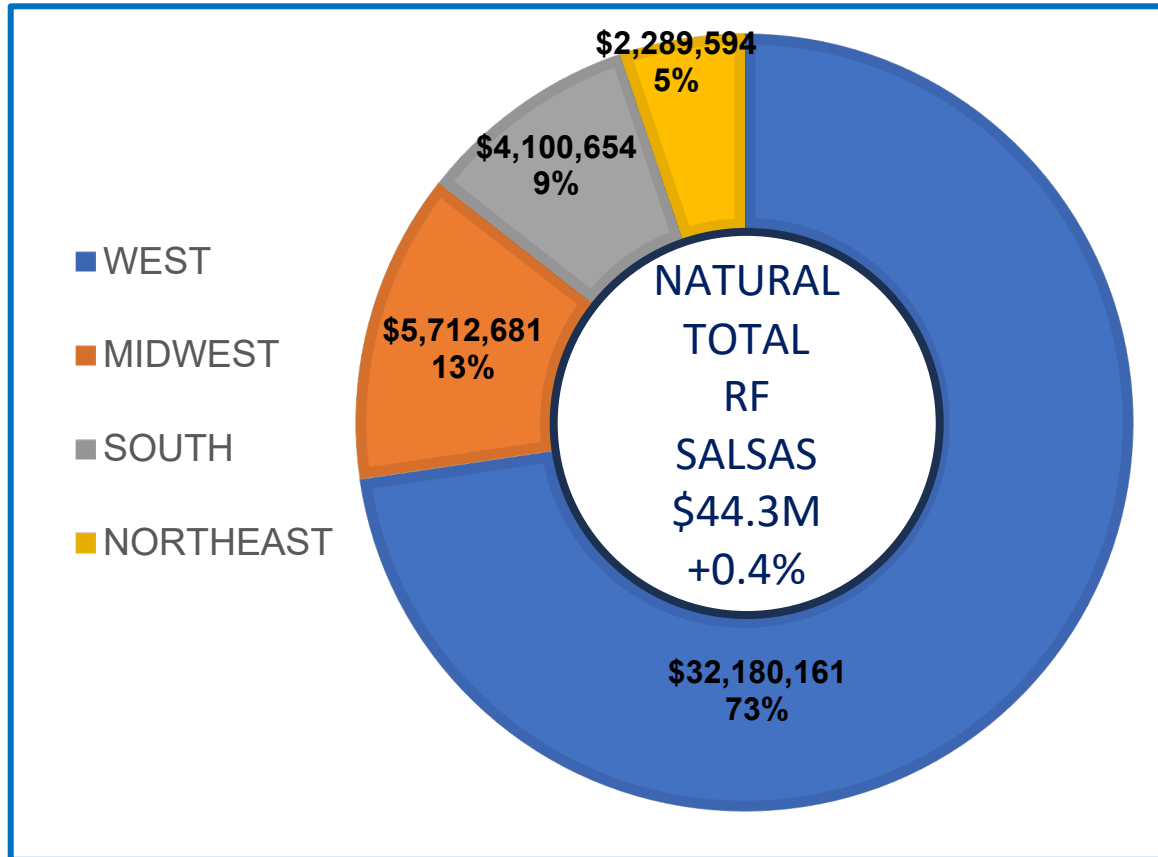
Dollar Change vs Year Ago



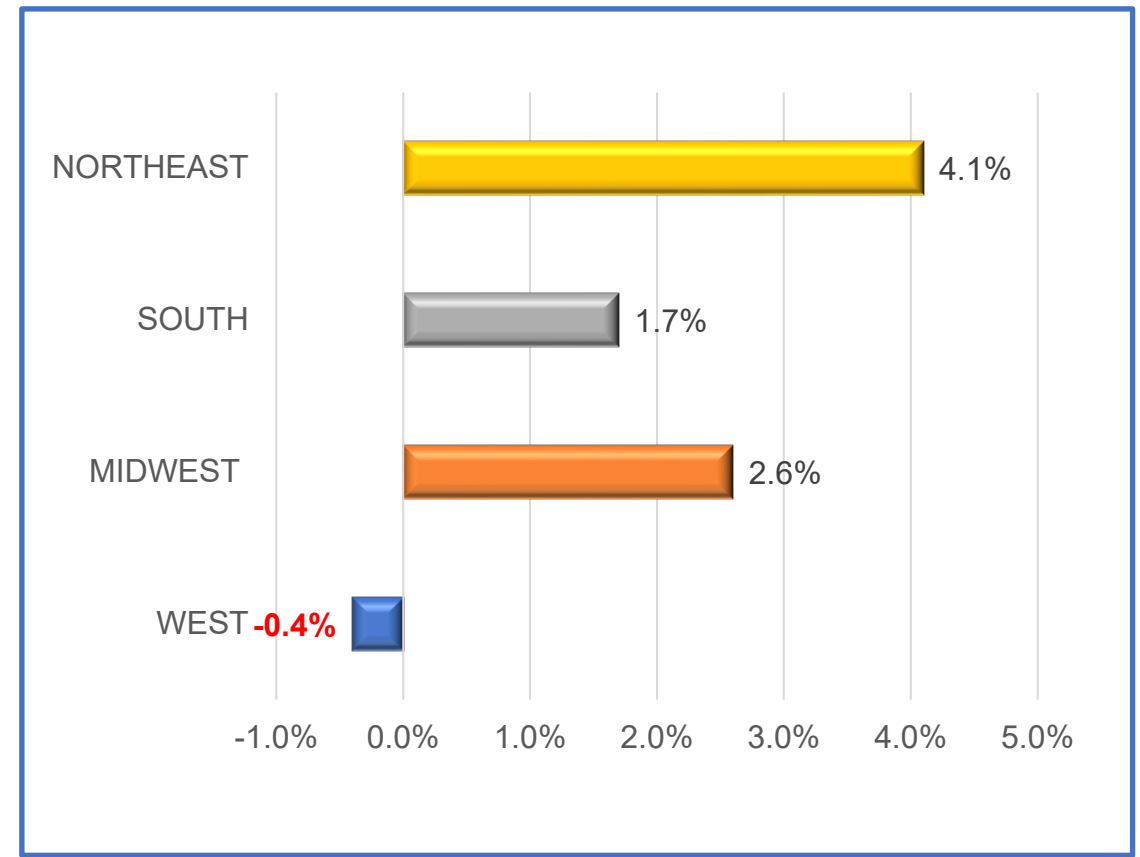
- Total Natural \$ volume for the Refrigerated Salsa subcategory is \$44.3M and grew 0.4% over prior year.
- The West region is the largest \$ volume region, followed by the Midwest, South, and the Northeast, respectively.
- All 4 census regions, with exception of the West (-0.4%), and Total US, are posting sales that are greater than prior year.

Natural Channel: Refrigerated Salsas Subcategory - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for a whopping 73% of \$ volume with flat \$ volume (-0.4%) to prior year.
- The 3 remaining regions, South, Northeast and Midwest, are responsible for the remaining 27% of \$ volume with respective growth of 1.7%, 4.1% and 2.6%.

Natural Channel: Refrigerated Salsas Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago
REFRIGERATED SALSAS & DIPS	\$33,280,228	\$32,414,299	2.7	6,310,490	6,222,393	1.4			5.27	5.21
RF SALSAS	\$2,289,594	\$2,200,382	4.1	414,099	396,631	4.4			5.53	5.55
MITCHELLS FRESH	\$491,843	\$493,551	-0.3	88,956	89,733	-0.9	22.1	2.7	5.53	5.5
LA MEXICANA	\$291,565	\$334,957	-13.0	57,190	65,473	-12.7	21.6	4.1	5.1	5.12
ITHACA	\$209,977	\$65,725	219.5	34,577	10,476	230.1	19.6	1.8	6.07	6.27
URBAN ROOTS	\$208,112	\$45,827	354.1	37,660	8,446	345.9	12.8	3.4	5.53	5.43
SAMS	\$102,040	\$173,140	-41.1	17,677	29,852	-40.8	14.2	1.5	5.77	5.8
F & S PRODUCE	\$96,673	\$149,854	-35.5	16,723	25,777	-35.1	12.8	1.0	5.78	5.81
NOBRAND	\$94,833	\$112,867	-16.0	13,589	16,171	-16.0	6.4	4.2	6.98	6.98
JALAPA JAR	\$81,404	\$47,792	70.3	11,422	6,486	76.1	2.2	2.0	7.13	7.37
SISTERS SALSA	\$74,167	\$75,980	-2.4	13,548	14,093	-3.9	3.5	1.8	5.47	5.39
YO QUIERO	\$70,926	\$136,253	-47.9	14,498	28,337	-48.8	5.8	2.9	4.89	4.81

- The Natural Channel Refrigerated Salsas subcategory is growing in \$ volume, at 4.1% over prior year in the Northeast, and is also growing in unit volume, at 4.4%.
- Mitchell's Fresh, the #1 brand in the subcategory with \$491.8M in \$ volume, is in slight decline -0.3% over prior year in dollars, and -0.9% in unit volume.
- Urban Roots, the #4 brand, has the distinction of being the highest growth brand with exponential growth in both dollars and units, 345.1% and 345.95%, respectively.

Retail Refrigerated Salsa & Dips

Category & Subcategory Report

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