



Euromonitor
International

Sauces, Dips and Condiments in the US

November 2025

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Sauces, Dips and Condiments in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Home cooking trend supports good growth

INDUSTRY PERFORMANCE

Consumption rises as shoppers switch to more affordable lines

Small and emerging brands take on heavyweights

Flavour development entices millennials and Gen Z

WHAT NEXT?

Innovation will capitalise on home cooking trend amid economic pressures

FDA redefines “healthy”, prompting reformulation in sauces, dips and condiments

US tariffs could lead to higher prices and less innovation

COMPETITIVE LANDSCAPE

Private label performs well in challenging economic climate

PepsiCo Inc completes Sabra Dipping Company acquisition, strengthening presence in dips

CHANNELS

Modern grocery retailers dominate distribution

Changing consumer habits drive growth in e-commerce and discounter channel

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Cooking Ingredients and Meals in the US - Industry Overview

EXECUTIVE SUMMARY

Shift to home cooking benefits sales, as consumers seek to save money

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Home cooking trends bolster demand, but economic factors and US tariffs present challenges

Sauces, dips and condiments grows as consumers seek to enhance flavour, add variety, and recreate restaurant-style dishes at home

Major players respond to use of GLP medications

WHAT'S NEXT?

Economic pressures will place stronger emphasis on home cooking

GLP-1 use will guide further product development

New legal definition of 'healthy' will lead to reformulation of products

COMPETITIVE LANDSCAPE

Private label share accounts for majority of sales

Stability is anticipated for the competitive landscape

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DISCLAIMER

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