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International Markets Bureau

MARKET INDICATOR REPORT | NOVEMBER 2011

Consumer Trends
Sauces, Dressings and Condiments in France

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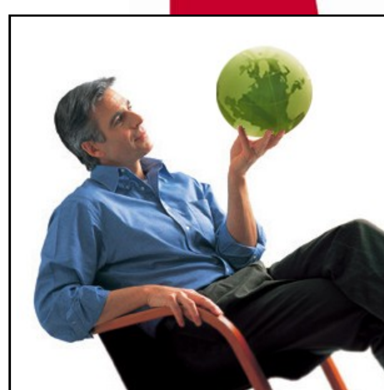

EXECUTIVE SUMMARY

France is the world's fifth largest economy, with a population of over 65 million in 2011. The country averages 75 million tourists every year, and approximately 77% of the population lives in an urban setting.

Since the beginning of 2008, the French have been suffering from declining purchasing power coupled with higher food prices and above-average inflation. However, the country's economy has been growing continuously since the second quarter of 2009, attaining a GDP of US$2.145 trillion in 2010, a growth of 1.5% (CIA Factbook). France's inflation sat at 1.5% in 2010, up from 0.1% in 2009.

Lack of consumer confidence has had a negative impact on the retail sector, with French consumers paying more attention to what and how they spend. Within the retail sector, this has been good news for discounters, as French consumers visited discounters much more frequently than in the past, resulting in value sales growth of 13% in 2008, followed by a further 3% growth in 2009.

Retail sales of sauces, dressings and condiments are expected to register a CAGR of 2.6% in value from 2011 to 2015, while volume consumption CAGR for the same time frame is forecast to increase 1.1%. Regular salad dressings and mayonnaise will continue to suffer from a negative nutritional image, which will impact sales as consumers seek healthier options. Dry sauces/ powder mixes are also expected to show a decline in sales from 2011 to 2015, due to a lack of popularity with French consumers. On the other hand, herbs and spices, liquid stock and soy sauce are all predicted to continue growing in popularity given the renewed French interest in home cooking. Dip sales are expected to be the top performer with a value CAGR of 5.4% from 2011 to 2015.

Many consumers are being forced to cut down on non-essential spending, looking instead for the best private label alternatives where perceived quality is similar, and/or for quality products at lower prices. Private label competition will be fierce as manufacturers implement product diversification and utilize pricing strategies in an effort to attract the price-conscious, but educated consumer. Versatile and expansive offerings will continue to drive volume sales across the category. While French consumers will want to know that they are eating healthy food products that contain less added flavours and preservatives, they will not want to compromise on taste.

INSIDE THIS ISSUE

DID YOU KNOW?

- Private label is performing better than most of its competition in the sauces, dressings and condiments industry.

- Low-fat salad dressing recorded the highest current value growth rate in 2010, with 9.8%.

CONSUMER TRENDS

- Many French consumers are expected to focus their spending on necessities, creating a demand for less expensive discounted products. However, the upper-income groups will continue to engage in more indulgent spending.

- French consumers are showing a greater interest in cooking at home in an effort to curb the effects of the recent economic crisis. Furthermore, these same consumers have switched to essential/basic products, for example, favouring the cheaper tomato pastes and purees over other prepared sauces. Following this trend, pasta and wet/cooking sauce sales in France declined, in both volume and value terms in 2010, with one exception - French consumers preferred to purchase the traditional prepared Bechamel sauce over making it from scratch.

- Across all demographics, more and more French consumer are increasingly aware of healthier eating practices. This is dictating their food choices and causing consumers to scrutinize food labels like never before, a trend that shows no sign of stopping as consumers continue to demand healthier products. Significant increases in volume and value sales of low-fat dressings and condiments over 2010 attest to the validity of this claim.

- Increasing global consumer demand for organic-based products has influenced the sauces, dressings and condiments industry in France. This trend will continue as branded manufacturers' portfolios and retailers' private label ranges increase.

- Environmental awareness amongst French consumers is increasing. This has created a demand for better packaging in many sectors, including packaged food, where there is an increased demand for easy-to-find green and ethical credentials on food product labels. The desire for recyclable or biodegradable packaging, however, cannot significantly impact pricing.

RETAIL TRENDS

- Private label performed better than most of its competition, gaining one percentage point and reaching 19% share. To address the growing demand, retailers have extended their offerings in the sauce category.

- French consumers appreciated the large assortment of food and non-food products offered by hypermarkets in the past, but this has changed, with discounters experiencing great success at hypermarkets' expense. This trend resulted in value sales growth in 2008 of 13%, and a further growth of 3% in 2009. Euromonitor is predicting retail sales through discounters will grow another 18% in the near future.

- Because of their proximity and the ability to develop personal relationships between consumers and staff, supermarkets fared a little better in sales than hypermarkets.

- Although modern French supermarkets offer one-stop shopping, many French people still adhere to the time-honored tradition of shopping at specialty stores for some specific types of food, such as the spicy Dijon mustard produced in the Burgundy region of France.

France Sales of Sauces, Dressings and Condiments by Distribution Format: % Retail Value Analysis

	2005	2006	2007	2008	2009	2010
Store-Based Retailing	99.8	99.7	99.6	99.6	99.5	99.2
Grocery Retailers	98.8	98.8	98.8	98.6	98.5	99.0
Supermarkets/Hypermarkets	83.3	83.1	82.9	82.8	82.8	82.7
Discounters	11.5	11.9	12.2	12.3	12.4	12.5
Small Grocery Retailers	2.7	2.5	2.4	2.2	2.15	2.5
Convenience Stores	0.5	0.5	0.5	0.5	0.5	0.8
Independent Small Grocers	2.2	2.0	1.9	1.7	1.7	1.7
Other Grocery Retailers	1.3	1.3	1.3	1.3	1.3	1.3
Non-Grocery Retailers	1.0	0.9	0.8	1.0	1.0	0.2
Other Non-Grocery Retailers	1.0	0.9	0.8	1.0	1.0	0.2
Non-Store Retailing	0.2	0.3	0.4	0.5	0.5	0.8
Internet Retailing	0.2	0.3	0.4	0.5	0.5	0.8

Source: *Euromonitor International*

MARKET DATA

- Compared to all other countries in Western Europe, France's sauces, dressings and condiments market value ranked fourth in terms of overall value, but thirteenth in per capita spending. French consumers spent US$40.8 per capita in 2010, while the Western European average for the same year was US$44.4.

France Sauces, Dressings and Condiments Market, Top 5 Countries in Western Europe by Value - US$ millions

	2005	2006	2007	2008	2009	2010
Western Europe	18,092.7	18,530.0	19,182.0	20,037.8	20,801.0	21,411.6
Germany	3,852.2	3,887.8	4,043.3	4,204.0	4,359.4	4,493.2
United Kingdom	3,062.3	3,201.2	3,383.1	3,570.7	3,747.9	3,928.0
Italy	2,528.2	2,557.5	2,610.8	2,779.7	2,883.7	2,947.8
France	2,258.4	2,278.1	2,315.5	2,378.3	2,477.8	2,563.7
Spain	1,341.7	1,405.3	1,464.9	1,524.7	1,569.2	1,596.6

Source: *Euromonitor International*

France - Sales of Sauces, Dressings and Condiments by Category, % Volume and Value Growth

	%	2009/10	2005-10 CAGR*	2005-10 TOTAL
Sauces, Dressings and Condiments	volume growth	1.8	1.5	7.8
	value growth	3.5	2.6	13.5

Source: *Euromonitor International.* ****CAGR =*** *compound annual growth rate*

- In France, the sauces, dressings and condiments industry recorded a solid performance in 2010, growing 4% in value, and reaching US$2.5 billion in sales.

- The sector's greatest value growth in 2010 was exhibited by low-fat salad dressing at 9.8%. Tomato paste and purees edged out low-fat mayonnaise to take second place with a value growth rate of 8.1% for 2010. Low-fat salad dressing also had the highest volume growth in 2010 with 8.0% and low-fat mayonnaise was second with 7.2%.

- The three main products predicted to experience the highest value CAGR from 2010 to 2015 will be dips (3.6%), herbs and spices (3.5%), and low-fat salad dressing (3.3%).

COMPETITION

- France is home to many Fortune 500 companies, with more Fortune Global 500 headquarters in Paris than in New York, London, Shangai, Beijing or Frankfurt. Paris is where you will find the headquarters of companies like Carrefour (the world's second largest retail group in terms of revenue), and Danone (the word's fifth largest food company).

- In the French sauces, dressings and condiments industry, multinationals dominate with domestic manufacturers playing a smaller but respectable role when looking at local and artisanal product offerings.

- Unilever Group is the leader in sauces, dressings and condiments with 26.8% value share in 2009, with much of these sales attributed to their long-standing brands Amora and Maille. By switching to free-range eggs in its mayonnaise, the company is focusing on implementing quality and sustainability practices in an effort to enhance its image. Better farming practices and product formulations are likely to bode well for further industry growth.

- With the acquisition of Benedicta in 2008, Heinz is now a contender in the cold sauces sub-category and shared top spot with Unilever. In an effort to change French consumers' impression of ketchup as a high calorie, low-quality condiment, Heinz launched an organic ketchup in late 2009, which helped move its ketchup line into the leading national brand position.

- For 2009, Panzani took steps to reinforce its position as the leading national brand of tomato pastes and purees by running a strong marketing and promotional campaign, which included a promotional campaign centered around a recipe challenge featured on various cooking websites.

- Historically speaking, Canada has had minimal exports of sauces, dressings and condiments into France.

- Canada's total export value to France of tomato ketchup and other tomato sauces was only CAD$22,510 in 2010, down from a record high of CAD$30,749 in value for 2009. This 2010 total puts Canada in 22nd place on the list of supplying countries.

- Canadian exports to France of sauces, preparations, and mixed condiments began to slowly rebound in terms of value from the 2008 total of CAD$88,508 to CAD$100,536 in 2010. These figures, however, are still well below a previous high of CAD$147,569 in 2005.

France - Sauces, Dressings and Condiments - Company Market Shares

Companies	2005	2006	2007	2008	2009
Unilever Group	28.2	28.0	27.7	27.5	26.8
McCormick & Co Inc	8.9	9.0	9.3	9.4	9.5
Nestlé SA	9.9	9.7	9.6	10.0	7.3
Heinz Co, HJ	1.8	1.9	1.9	5.6	6.1
Grupo Ebro Puleva SA	5.3	5.3	5.6	5.8	5.9
Campbell Soup Co	3.0	2.9	2.9	2.9	2.6
COFIGEO - Cie Financière Geo	-	-	-	-	1.9
Aceites Borges Pont SA	-	-	2.0	1.9	1.9
Mars Inc	2.0	2.1	2.0	2.0	1.9
Comolive SA	1.3	1.3	1.2	1.2	1.2
McIlhenny Co	1.1	1.1	1.1	1.1	1.1
Bongrain SA	0.7	0.7	0.8	0.8	0.8
Barilla Holding SpA	0.7	0.8	0.9	0.5	0.6
Conserve Italia - Consorzio Cooperative Conserve Italia scarl	0.9	0.8	0.7	0.6	0.5
Blini SA	0.4	0.4	0.4	0.5	0.5
Fresh Del Monte Produce Inc	-	-	-	-	0.4
Flli Saclà SpA	0.5	0.6	0.6	0.3	0.3
General Mills Inc	0.1	0.2	0.2	0.2	0.2
Coopérative Agricole Cabanon	0.2	0.2	0.1	0.1	0.1
Kikkoman Corp	0.1	0.1	0.1	0.1	0.1
Bénédicta SA	3.6	3.6	3.7	-	-
Tramier SA	2.1	2.0	-	-	-
Private Label	17.9	18.1	18.4	18.5	19.4
Others	11.3	11.3	10.8	10.9	10.8

Source: *Euromonitor International, Sauces, Dressings and Condiments*

France Imports of Sauces, Dressings and Condiments from Canada, 2010 - in CAD$

Product Category	Supply Rank	Export Value
Soy Sauce	15	21,011
Tomato Ketchup and Other Tomato Sauces	22	22,510
Sauces, Preparations and Mixed Condiments	39	100,536

Source: *Global Trade Atlas*

PRODUCT DEVELOPMENTS

- Mintel lists a total of 604 new sauces and seasonings products that were launched in France in 2010.

- Innovation and product development in this sector have, and will continue to, focus on product reformulations and improvements, including adding more natural ingredients in response to growing consumer demand for naturalness and quality.

- The table sauces category had many new flavours introduced such as garlic, parsley, thyme and basil. More exotic tastes, such as hot chili sauce in the ketchup category and Asian wasabi type sauces, were also major factors in this trend.

- Amora reformulated its ketchup range, touting no additives or preservatives. Improved health awareness from French consumers is driving the product reformulation trend, with low-fat sauce, dressing and condiment products squeezing out their higher-calorie alternative.

- To rejuvenate sales of wet/cooking sauces, some manufacturers have launched a number of products in niche areas. Benedicta launched a sauce for kebabs, and Elle & Vire launched a crème fraiche sauce.

France Top 5 New Product Launches by Sub-Category - 2010

	Seasonings	Oils	Pickled Condiments	Cooking Sauces	Table Sauces
Sauces and Seasonings	110	80	79	76	66

Source: *Mintel*

REGIONAL CHARACTERISTICS

- France is broken into 101 departments (administrative divisions), which are grouped into 27 broader regions (22 metropolitan/national and 5 overseas).

- The most important regions in France are Ile-de-France (Europe's wealthiest and largest regional economy; ranked fourth in the world under the same criteria); Rhône-Alpes (Europe's fifth-largest regional economy due to its services, advanced technologies, chemical industries, wines, and tourism); Provence-Alpes-Côte d'Azur (services, industry, tourism and wines), Nord-Pas-de-Calais (European transport hub, services, industries) and Pays de la Loire (green technologies, tourism).

- According to 2008 statistics from France's National Institute of Statistics and Economic Studies (INSEE), Yvelines has the highest income of all departments of the country, with an average household income of US$5,421 per month. Hauts-de-Seine comes second, followed by Essonne, Paris, and Seine-et Marne.

- In terms of regional income, important inequalities can be observed. Ile-de-France is the wealthiest region in the country with an average household income of US$4,667 per month compared to US$3,582 at the national level. Alsace comes second, followed by Rhône-Alpes, Picardy, and Upper Normandy.

▶ The poorest parts of France are the French overseas territories, with French Guiana being the poorest department with an average household income of US$2,639. In metropolitan France, it is Creuse, in the Limousin region, which has the lowest household income, with an average of US$2,673 per month. Huge inequalities can also be found among cities. In the Paris metropolitan area, significant differences exist between the higher standard of living of Paris West, and the lower standard of living in areas in the northern outskirts.

▶ For cities of over 50,000 inhabitants, Neuilly-sur-Seine, a western suburb of Paris, is the wealthiest city in France with an average household income of US$7,856, and 20% of households earning more than US$11,562 per month. Within Paris, four arrondissements (administrative districts) are surpassing wealthy Neuilly-sur-Seine in terms of household income (the 6th, 7th, 8th and 16th), with the 8th arrondissement being the wealthiest district in France (the other three following closely as 2nd, 3rd and 4th wealthiest).

▶ In terms of aggregate wealth, the French are the wealthiest Europeans, accounting for more than a quarter of the wealthiest European households.

▶ WHOLESALERS/DISTRIBUTORS/IMPORTERS

France - Sauces and Condiments Suppliers, Producers and Wholesalers
Grouped by Wealthiest and Largest Economies, and by Region - 2010

Region	Business	City/Town
Rhône-Alpes	Ferco development	Saint Montan
	Fytosan	Die
	L'Hermital sarl	Loriol Sur Drome
	Les Jardins du Printemps	Rillieux La Pape
	Mavanilla	Villeurbanne
	Mega Fraix	Montelimar
	Packarom Eurl	Lablachere
	Provence Alpes	Saulce Sur Rhone
	Provence Epi d'Or	Châteauneuf-du-Rhône
	RDR	Nyons
	Rich Ail Sas	Montoison
	Sarl Herbarom Laboratoire	Aouste Sur Sye
	Seguy Nutrition Animale	Savasse
	Soc Coop Agric Plant Aroma Medic Diois	Vercheny
	Société en nom Collectif Antartic II	Charmes Sur Rhône
	Société Terra Provence	Saint Auban Sur l'Ouveze

Source: *Europages business directory*

France - Sauces and Condiments Suppliers, Producers and Wholesalers Grouped by Wealthiest and Largest Economies, and by Region - 2010

Region	Business	City/Town
Paris and Île de France	Albert Menes	Clichy
	Assaisonnements Briard	Nanteuil Les Meaux
	Bouvery Int'l SA	Port Villez
	Chirag	Paris
	Cie Salins Du Midi Et Salines De L'est	Paris
	Cofi	Ivry Sur Seine
	Concept'arome	Courtomer
	Confida	Villebon Sur Yvette
	Cpl Aromas France	Saint Cloud
	Darbonne Aromatique	Milly-La-Forêt
	Deotto Expresso Systems	Donneuil sur Marne Cedex
	Distri-sud Service	Echarcon
	Divinitalia	Sartrouville
	Ets Moulin	Saint Maur Des Fosses
	Fimex France Import Export	Paris
	Financière Branex	Pantin
	Foods International SA	Cergy
	Divaudan France Arome SAS	Argenteuil
	Guayapi Tropical	Paris
	Illycaffe France	Paris
	Jardin Diffusion	Boissise le Roi
	Kioko	Paris
	Miko Café Service	Argenteuil Cedex
	Mokarabia France	Cergy Pontoise Cedex
	Nespresso France	Paris
	Piments Pourpres Productions	Paris
	Primo	Orly
	Raps Epices	Boulogne Billancourt
	Reitzel Briand Sas	Paris
	Sélections Gourmandes	Chanteloup En Brie
	SNC Soreme	Suresnes
	Soc Frdes Thes et de L'Orient 1842	Bonnières-sur-Seine
	Société Nouvelle de Torrefaction	Paris
	Solvay-Electrolyse-France	Paris
	The English Tea House Betjeman et Barton	Paris
	Tradimpex JM Thiercelin	Combs la Ville
	Unilever France	Rueil Malmaison
	Val-de-Seine distribution	Buchelay
	Vinaires Arnaud et Jolly	Ris Orangis

Source: *Europages business directory*

France - Sauces and Condiments Suppliers, Producers and Wholesalers Grouped by Wealthiest and Largest Economies, and by Region - 2010

Region	Business	City/Town
Provence-Alpes-Côte d'Azur	Accent du Sud	Albaron
	Procamex Provence Camargue Export	Arles
	Jean Gazignaire S A	La Rouquette-Sur-Siagne
	Cepasco	Gémenos Cedex
	Maison Vanille	Sisteron
	Arome Naturel Epice Pour Industrie Alimentaire	Marseille
	Association Carpensud	Carpentras
	Ayad Maurice	Marseille
	Borges Tramier	Vitrolles
	Cafés Arabo Torrefaction Cafés	Nice
	Comptoir Provençal des Sauces	Avignon
	Denery	Marseille
	Dessert Products International	Monteux
	Epices Fuchs Sarl	Carpentras
	Esprit & Gout, Assembleurs de Saveurs	Saint Rémy De Provence
	Expressions Aromatiques	Mouans Sartoux
	Extraits Végétaux et Dérives Sa	Gardanne
	Fils de Marius Auda	Gattières
	Herboristerie Wittwer	Carros
	Laboratoire Araquelle International	Lançon-Provence
	Laboratoire d'Herboristerie Générale	Marseille
	Laboratoire Holistica International	Éguilles
	Laco Sas	Marseille
	Le Coq Noir	L Isle Sur La Sorgue
	M et J Mul Ety Compagnie Ernest Cavasse	Pégomas
	Marius Bernard	St. Chamas
	McCormick France	Avignon
	Père Grégoire	Hyères
	Potier Christian SA	Carpentras
	Provence Tradition	Avignon
	Société exploitation ets Msica	L Isle Sur La Sorgue
	Société Marseillaise d'Importation	Grasse
	Socoherb SA	Marseille
	Tramier Industrie	Vitrolles
	Vanille et Produits SAS	Le BaR Sur Loup

Source: *Europages business directory*

France - Sauces and Condiments Suppliers, Producers and Wholesalers Grouped by Wealthiest and Largest Economies, and by Region - 2010

Region	Business	City/Town
Nord-Pas-de-Calais	Sarl Gilbert Lasselin	Ramillies
	Agristo France	Lille
	Aromat	Saint-Sylvestre-Cappel
	Benedicta	Seclin
	Covinor	Raismes
	Duromortier	Roubaix
	Epicea	Cuincy
	Eurovanille	Gouy Saint Andre
	Kerry Savoury Ingredients France	Villeneuve d Ascq
	Les Produits Français Evolution	Cambrai
	Royale Sauce	Neuville En Ferrain
	Sarl Slac	Tourcoing
	Sas Idelys	Houplines
	Sauces et Créations	Raillencourt Ste Olle
	Société des Cafés Japa	La Madeleine
	Vinaigrerie de Carvin	Carvin
	Yvalli	Boeschepe

Source: *Europages business directory*

INDUSTRY SEGMENTS

Bouillon/Stock Cubes

- The market value of bouillon/stock cubes reached US$230.9 million in 2010, a jump of 2.6% from US$225.2 million in 2009. Value sales in 2015 are forecast to reach US$256.6 million.

- Volume sales for the category went from 10,500 tonnes in 2005, to 11,900 tonnes in 2010. Forecasts predict bouillon/stock cube volume to reach 12,300 tonnes in 2015, of which stock cubes and powder volumes will be approximately 11,000 tonnes.

France - Bouillon/Stock Cubes Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Bouillon/Stock cubes	2.4	0.8	2.6	2.1
Liquid stocks and fonds	3.4	n/a	3.7	n/a
Stock cubes and powders	2.3	n/a	2.3	n/a

Source: *Euromonitor International, Sauces, Dressings and Condiments*
Note: *More detailed forecast data is not available for this category.*
****CAGR =** compound annual growth rate*

Dips

▶ This sector has seen steady growth since 2005, with a 2010 market value of US$82.1 million, slightly up from 2009 figures of US$78.6 million, a growth of 4.5%. Forecast value sales are expected to reach US$106.8 million in 2015.

▶ Volume sales were 5,300 tonnes in 2005, and reached 6,600 tonnes in 2010. Dips are predicted to reach a volume of 7,600 tonnes in 2015.

France - Dips Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Dips	4.5	3.0	4.1	5.4

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =** compound annual growth rate*

Herbs and Spices

▶ Market value in this category reached US$402.1 million in 2010, up from US$381.5 million in 2009. This represents a growth of 5.4%. Value sales are predicted to reach US$519.2 million in 2015.

▶ The herbs and spices category volume was 7,900 tonnes in 2005, and reached 9,200 tonnes in 2010. Herbs and spices volume consumption will continue to grow, reaching an estimated 10,300 tonnes in 2015.

France - Herbs and Spices Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Herbs and Spices	2.9	2.2	3.7	5.1

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =** compound annual growth rate*

Dry Sauces/Powder Mixes

▶ The market value of this sub-category has been in decline since 2005, dropping from US$41.1 million in 2005 to US$32.2 million in 2010. Sales are also expected to decline steadily from 2011, dropping to US$28.6 million in 2015.

▶ Consumption volume for the category was 1,300 tonnes in 2005, beginning a steady fall to 1,000 tonnes in 2010. Dry sauces/powder mixes' volume sales are expected to continue to decline somewhat over the next five years, dipping to 900 tonnes by 2015.

France - Dry Sauces/Powder Mixes Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Dry Sauces/Powder Mixes	-4.4	-2.7	-4.8	-2

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =** compound annual growth rate*

Pasta Sauces

- For 2010, market value for pasta sauces was US$293.4 million, slightly up from US$292.7 million in 2009. Value sales are predicted to grow to US$345.3 million by 2015.

- Volume consumption of pasta sauces in France has declined since 2008, dropping from 53,600 tonnes to 51,800 tonnes in 2010. However, this category is predicted to grow in the years ahead, reaching 54,400 tonnes in 2015.

France - Pasta Sauces Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Pasta Sauces	0.5	1.4	1.5	3.7

Source: *Euromonitor International, Sauces, Dressings and Condiments*
***CAGR =** compound annual growth rate*

Ketchup and Mustard

- The market value of ketchup in 2010 reached US$124.8 million, an increase from US$118.7 million in 2009. Mustard value sales were US$162.5 million in 2005, growing to US$178.2 million in 2010. Value sales for ketchup are expected to reach US$149.8 million in 2015, while mustard is predicted to reach US$184.2 million in the same year.

- The French consumer's appreciation for mustard comes across in the many dishes in which this ancient condiment appears, from "lapin à la moutarde" (rabbit with mustard) to vinaigrette made with mustard, oil and red wine vinegar. You will not find ranch dressing and the like in France, as mustard takes precedence in salad dressings. The French also enjoy keeping a dollop of mustard on their plates in which to dip steak or lamb. Ninety percent of all mustard made each year in France is Dijon-style, with most of the seed used in Dijon mustard imported from Canada.

- Ketchup consumption has steadily increased in volume, from 31,000 tonnes in 2005 to 35,200 tonnes in 2010, and is predicted to reach 39,900 tonnes in 2015. Mustard consumption is expected to experience slower growth, from 39,400 tonnes in 2010 to 40,800 tonnes by 2015.

France - Ketchup and Mustard Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Ketchup	2.5	2.3	2.4	3.6
Mustard	-0.2	0.8	1.9	0.6

Source: *Euromonitor International, Sauces, Dressings and Condiments*
***CAGR =** compound annual growth rate*

Mayonnaise

- In 2010 the market value for mayonnaise reached US$240.6 million, up from US$233.9 million in 2009, a growth of 2.9%. Overall, the mayonnaise category is forecast to grow in value to US$271.8 million in 2015.

- The big winner in the mayonnaise category was the low-fat variety, outperforming regular mayonnaise volume consumption by 7.1% on average from 2005 to 2010. Mayonnaise volume consumption is expected to reach 50,200 tonnes in 2015, of which the low-fat variety is predicted to account for 11,800 tonnes.

France - Mayonnaise Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Mayonnaise	2.9	1.3	1.8	2.2
Low fat	8.7	n/a	8.4	n/a
Regular	1.6	n/a	0.1	n/a

Source: *Euromonitor International, Sauces, Dressings and Condiments*
Note: *More detailed forecast data is not available for this category.*
****CAGR =** compound annual growth rate*

Pickled Products

- This category has shown consistent growth in value since 2005, from US$321.1 million in 2005 to US$382.2 million in 2010. The pickled products category is forecast to continue its growth curve from 2011 onward, reaching US$417.8 million in 2015.

- Pickled products experienced a respectable volume growth of 3.0% in 2010 (42,200 tonnes), up from the 2005 figure of 40,000 tonnes. Pickled products' volume is expected to show a similar growth trend over the next five years, and is forecast to reach 43,000 tonnes in 2015.

France - Pickled Products Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Pickled Products	1.0	0.0	3.5	1.1

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =** compound annual growth rate*

Salad Dressings

- Market value in 2008 was US$38.8 million and grew to US$40.9 million in 2010. Value sales are predicted to start declining in 2011 and are forecast to fall to US$40.4 million by 2015.

- Volume consumption of total salad dressing has fallen since 2008, dropping to 5,600 tonnes in 2010. Low-fat salad dressing is the top performer in this category, with a steady upward swing in volume consumption since 2005. However, it accounted for only 900 tonnes of the salad dressings category in 2010. Overall, salad dressings' volume consumption will follow the same downward trend seen in value sales, and is expected to decline from 2011 onward, totalling 5,100 tonnes by 2015.

France - Salad Dressing Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Salad Dressing	2.1	-1.7	5.7	-0.5
Low-Fat Salad Dressing	17.7	n/a	17.0	n/a
Regular Salad Dressing	0.1	n/a	3.5	n/a

Source: *Euromonitor International, Sauces, Dressings and Condiments*
Note: *More detailed forecast data is not available for this category.*
****CAGR =** compound annual growth rate*

Soy-Based Sauces

- Soy-based sauces' market size for 2010 reached US$11.5 million, showing a CAGR of 8.8% from 2005 to 2010. The category is expected to reach US$13.9 million in 2015.

- Volume consumption was steady in this category, staying at 600 tonnes from 2005 to 2010. Minimal volume growth is forecast for soy based sauces from 2011 onward, with the category expected to reach 700 tonnes in 2015.

France - Soy-Based Sauces Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Soy-Based Sauces	2.1	0.8	8.8	3.4

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =*** *compound annual growth rate*

Table Sauces

- The table sauces category reached US$177 million in value in 2010. Since 2005 this category has seen solid growth from US$146.6 million, with an average increase of 3.8% per year. The value of this category is predicted to reach US$191.6 million in 2015.

- In 2010, the category volume consumption was 16,100 tonnes, up from 15,900 tonnes in 2009. Table sauces are predicted to reach 16,200 tonnes in volume in 2015, exhibiting minimal growth from 2010 to 2015.

France - Table Sauces Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Table Sauces	2.3	-0.1	3.8	1.5
Tabasco	2.4	n/a	3.0	n/a
Others	2.3	n/a	4.1	n/a

Source: *Euromonitor International, Sauces, Dressings and Condiments*
Note: *More detailed forecast data is not available for this category.*
****CAGR =*** *compound annual growth rate*

Tomato Pastes and Purees

- The market size of this category reached US$131.9 million in 2010, up from US$122 million in 2009, and is forecast to reach US$162.5 million in value in 2015.

- Tomato pastes and purees' volume consumption grew consistently from 2005 to 2010, reaching 50,600 tonnes in 2010. Predictions are that the category will speed up its growth trend slightly, reaching a consumption volume of 57,300 tonnes by 2015.

France - Tomato Pastes and Purees Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Tomato Pastes and Purees	2.3	2.4	3.9	3.8

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =*** *compound annual growth rate*

Vinaigrettes

▶ The value of the French vinaigrette market reached US$55.7 million in 2010, up slightly from US$54.8 million in 2009. This market has consistently registered small losses in size since 2007, but regained market share in 2010. Forecast value of this category shows slight fluctuations over the next 5 years, and may reach US$56.5 million sales in 2015.

▶ In 2010 volume consumption of this category reached 15,800 tonnes. Vinaigrettes show slight fluctuations in volume consumption in the forecast period, dipping to 15,600 tonnes in 2015.

France - Vinaigrettes Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Vinaigrettes	-0.6	-0.4	-0.7	0.2

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =*** *compound annual growth rate*

Wet/Cooking Sauces

▶ Wet/cooking sauces' market value has been in steady decline since 2005, from US$102.2 million in 2005, to US$93.4 million in 2010, averaging a decline of 1.8% per year. A drop in value for this category is also predicted to occur from 2011 onward, dropping to US$88.4 million in 2015.

▶ Volume sales of wet/cooking sauces showed a decline of 3.0% in 2010, dropping from 13,200 tonnes to 12,800 tonnes. Volume consumption is predicted to dip over the next five years to 11.4 thousand tonnes in 2015.

France - Wet Cooking Sauces Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Wet/Cooking Sauces	0.8	-2.1	-1.8	-0.6

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =*** *compound annual growth rate*

Other Sauces, Dressings and Condiments

▶ The other sauces, dressings and condiments category has seen steady growth in value since 2005. In 2010 this market experienced the most growth, reaching US$86.8 million, up from US$81.8 million in 2009. Average growth from 2005 to 2010 was 4.6%. This value growth is expected to continue steadily from 2011 onwards and is predicted to reach US$103.6 million in 2015.

▶ Volume intake in this category remained relatively stable over the 2005 to 2010 period, averaging 2.0% growth per annum to reach 10,200 tonnes in 2010. The category's volume is predicted to reach 11,000 tonnes in 2015, exhibiting steady growth each year.

France - Other Sauces, Dressings and Condiments Category Growth

	Volume		Value	
	2005-2010 CAGR*	2011-2015 CAGR*	2005-2010 CAGR*	2011-2015 CAGR*
Other Sauces, Dressings and Condiments	2.0	1.3	4.6	3.2

Source: *Euromonitor International, Sauces, Dressings and Condiments*
****CAGR =*** *compound annual growth rate*

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