2015

Condiments, Sauces & Vegetables in the USA Market

Market Analysis & Consumer Trends

Produced by

TRADE USA
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Chapter 1 | About

1.1. Harmonizing (HS) Codes

The respective harmonizing codes (HS) for pepper, peppers and capsicum, prepares or preserved tomatoes and finally sauces, mixed condiments & mixed seasonings analyzed in this report are defined in the table below, as stated by the International Trade Center (ITC). The major exporting country to the US market for each category is listed in the final column. The main countries from which the US imports to satisfy the national demand for these product categories are either South American or Asian countries, with minor contribution from Europe and Canada.

HS Code	Product Label	Exporting Country
0904	**Pepper, peppers and capsicum**	
090411	Pepper of the genus Piper, ex cubeb pepper, neither crushed nor ground	
090412	Pepper of the genus Piper, except cubeb pepper, crushed or ground	**Vietnam, India, Indonesia, Brazil, China**
090420	Fruits of the genus Capsicum or Pimenta, dried, crushed or ground	
090422	Fruits of the genus Capsicum or of the genus Pimenta : Crushed or ground	
090421	Fruits of the genus Capsicum or of the genus Pimenta : Dried, neither crushed nor ground	
2002	**Tomatoes prepared or preserved**	
200290	Tomatoes nes, prepared or preserved other than by vinegar or acetic acid	**Italy, Israel, Turkey, Chile, China**
2002908010	Tomato paste, in containers holding less than 1.4 kg	
2002908020	Tomato paste, in containers holding 1.4 kg or more	
'2002908030	Tomato puree, in containers holding less than 1.4 kg	
2002904000	Tomatoes, nesoi[1], prepared or preserved otherwise than by vinegar or acetic acid, in powder	
2103	**Sauces, mixed condiments & mixed seasonings**	
210390	Sauces and preparations nes and mixed condiments and mixed seasonings	**Canada, Mexico, Italy, Thailand, China**
210310	Soya sauce	
210320	Tomato ketchup and other tomato sauces	
210330	Mustard flour and meal and prepared mustard	
Source: International Trade Center (ITC)		

[1] Nowhere else specified or indicated

Figures 1A, B and figure 2, illustrate the bilateral trade patterns between the United States of America (USA) and the rest of the world (ROW) for the three categories of products defined above.

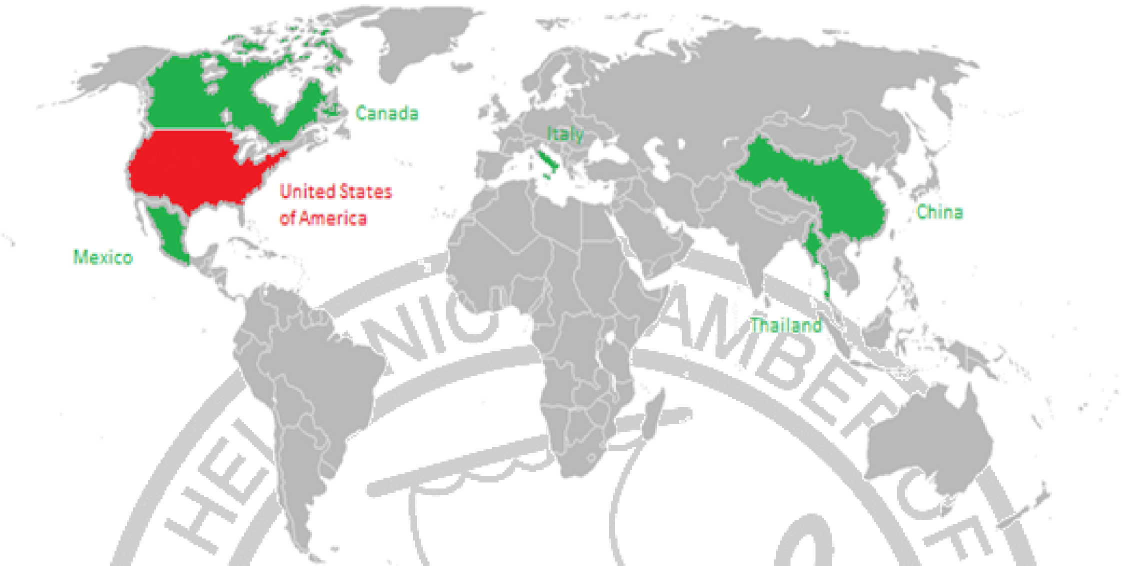
Figure 1A: Map of Major Exporting Counties of Pepper, peppers and capsicum HS Code 0904 (2015)

Source: Trade USA- US CENSUS BUREAU – UN COMTRADE

Figure 1B: Map of Major Exporting Counties of Tomatoes prepared or preserved HS Code 2002 (2015)

Source: Trade USA- US CENSUS BUREAU – UN COMTRADE

Figure 2: Map of Major Exporting Counties of Seasonings & Condiments under HS Code 210390 (2015)



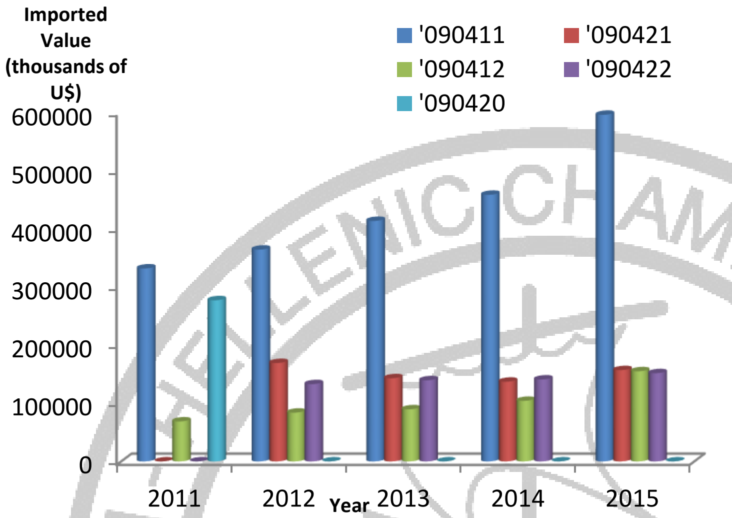
Source: Trade USA- US CENSUS BUREAU – UN COMTRADE

Chapter 2 | International Competitive Landscape

2.1. Pepper, peppers and capsicum (HS Code 0904)

Peppers of the genus Piper are the most highly imported category of peppers under HS Code 0904, which also follows a rapidly growing trend over the five year period examined in the figure below. The total imported value in 2015 for HS Code 0904 has exceeded $600,000.

Figure 3: USA Imported Value for HS Code 0904 (2011 - 2015)



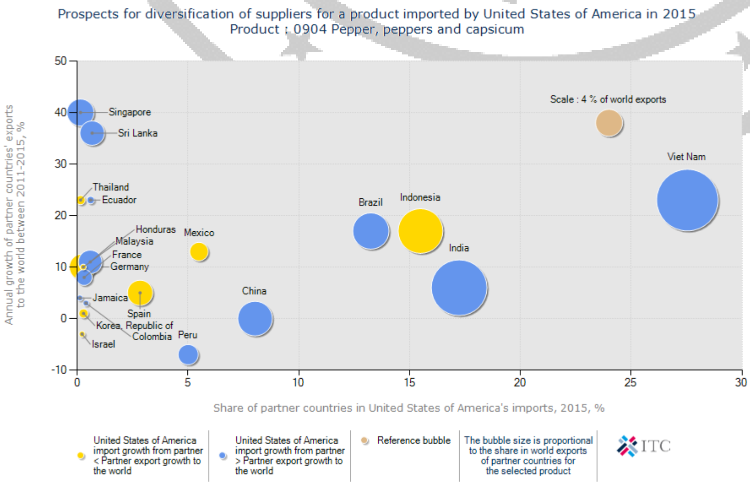
HS Code	Product Label
'090411	Pepper of the genus Piper ,ex cubeb pepper, neither crushed nor ground
'090421	Fruits of the genus Capsicum or of the genus Pimenta : Dried, neither crushed nor ground
'090412	Pepper of the genus Piper, except cubeb pepper, crushed or ground
'090422	Fruits of the genus Capsicum or of the genus Pimenta: Crushed or ground
'090420	Fruits of the genus Capsicum or Pimenta, dried, crushed or ground

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

The diversification of suppliers for HS Code 0904 is illustrated below and indicates that the countries with tropical climates (South American and Asian) have a dominating position and a high import growth rate in this market and that the European countries have a relatively insignificant contribution for this HS Code.

Figure 4: Diversification of Suppliers in the USA for HS Code 0904 (2015)



Source: International Trade Center (ITC)

Tables 1 and 2 below represent the **top five importing countries** to the US market in order to satisfy the domestic demand for the examined period 2011 - 2015. Dominated by Asian and South American economies the following trends are emphasized:

- the Vietnamese market captures 27,5% of the importing market in 2015
- India has grown by 64% during the given period
- Indonesia has a high quality product since its imported quantity is low

Table 1: Imported Value by Country to the USA

HS Code: 0904 (Pepper, peppers and capsicum)
Unit: thousands of US$

Exporters	2011	2012	2013	2014	2015
World	680,813	754,641	789,894	844,597	1,064,000
Vietnam	126,803	96,448	172,471	279,347	293,006
India	111,828	143,524	122,133	124,212	183,406
Indonesia	122,169	185,720	153,690	92,409	164,854
Brazil	69,446	60,779	85,427	100,279	141,031
China	76,235	82,774	74,466	70,297	85,420

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

- Brazil is grown significantly by 103%
- China has grown by 12% in terms of value

Table 2: Imported Quantity by Country to the USA

HS Code: 0904 (Pepper, peppers and capsicum)
Unit: tons

Exporters	2011	2012	2013	2014	2015
World	178,423	182,909	187,072	181,268	203,666
Mexico	33,893	33,760	38,685	38,073	40,727
India	28,720	35,172	31,272	32,006	40,080
Vietnam	19,423	12,401	23,451	34,278	30,766
China	19,256	21,152	19,788	18,746	24,348
Peru	22,410	23,980	17,202	15,878	16,000

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

In terms of quantity:

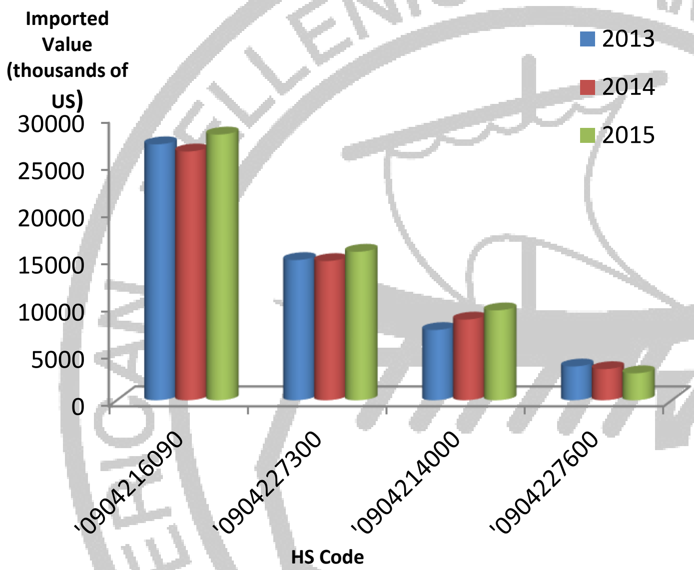
- Mexico is the leading country (capturing 20% of the importing market), suggesting that the product is of low product since it is not found amongst the top exporting countries in value terms
- Peru has contracted in terms of its imports by 28,6%
- China has grown by 26,4% during the same period

The following section presents the bilateral trade patterns for some of the most interesting markets.

Mexico

Mexico is an in an important market in terms of quantity but not in terms of value. The major contribution to Mexican exports to the US is the dried or crushed capsicum pepper, followed by mixtures of hot red peppers and salt under HS Code 0904227300, with a significantly lower imported value.

Figure 5: Bilateral Trade between USA and Mexico HS Code 0904 (2013 – 2015)



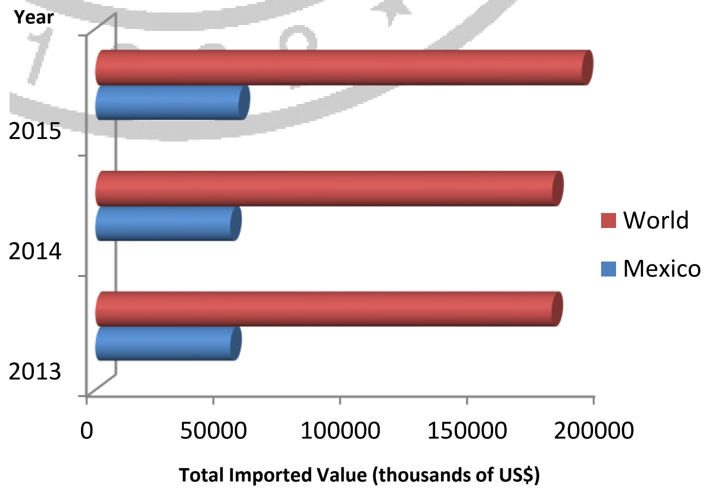
HS Code	Product Label
'0904216090	Fruits of the genus capsicum, dried or crushed but not ground, nesoi
'0904227300	Mixtures of mashed or macerated hot red peppers and salt, ground
'0904214000	Anaheim and ancho pepper (genus capsicum), dried, neither crushed or ground
'0904227600	Fruits of the genus capsicum, ground, nesoi

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 6: USA Imported Value HS Code 0904 Mexico vs. World HS Code 0904 (2013 -2015)

- The total imported value of the top imported products is presented in figure 6.
- On average for the three year period, Mexico approximately 1/4 of the total imported value from the world.
- This is a result of market fragmentation.

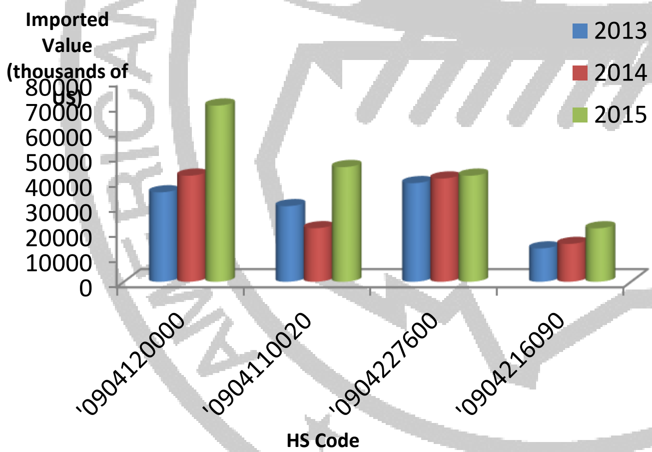


Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

India

India holds the second position in the US importing market, both in terms of value and quantity, for HS Code 0904 but the primary for peppers. The imported value of crushed or ground pepper of the genus piper (nearly $80,000 in 2015) is the key product which manages to maintain India between leading players in the international market by differentiation its products which continue to follow an increasing trend. Unprocessed black pepper falls into the same category, however its imported values is only half in monetary terms. Fresh and dried fruits of the genus capsicum are the next most highly imported product in the category.

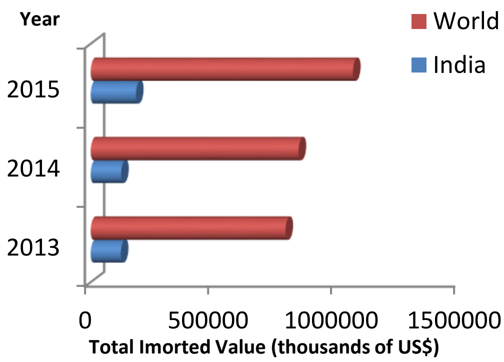
Figure 7: Bilateral Trade between USA and Mexico HS Code 0904 (2013 – 2015)



HS Code	Product Label
'0904120000	Pepper of the genus piper, crushed or ground
'0904110020	Pepper of the genus piper, neither crushed nor ground, black
'0904227600	Fruits of the genus capsicum, ground, nesoi
'0904216090	Fruits of the genus capsicum, dried or crushed but not ground, nesoi
Source: International Trade Center (ITC)	

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 8: Total Imported Value HS Code 0904 India vs. World (2013 -2015)



Each year, India continues to capture a groaning proportion of the importing market for HS Code 0904, proportionally to the growth of the total market, as a result of increasing domestic demand.

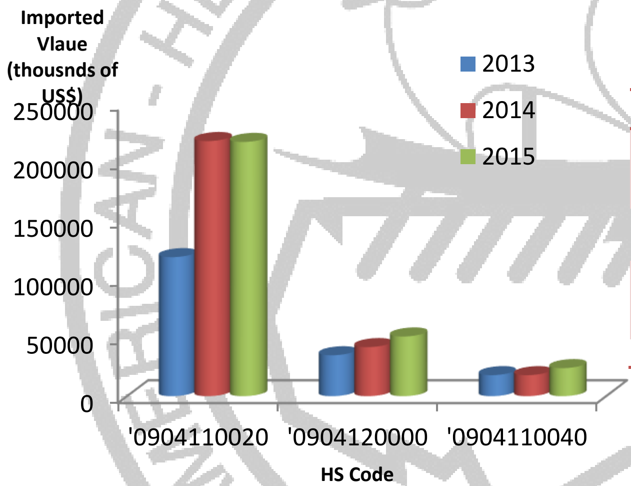
Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Vietnam

The Vietnamese market is of primary importance to the US supply market for HS Code 0904, its imported value for the top HS Code in 2015 reaching a value over $200,000. However the major importing products are not directly of interest, since exports to the US are based on pepper.

Competition mainly comes from unprocessed black pepper and not peppers, which follows a growing trend. Therefore Vietnam is not a strong competitor for peppers which are found under the vegetable category.

Figure 9: Bilateral Trade between USA and Vietnam HS Code 0904(2013 – 2015)

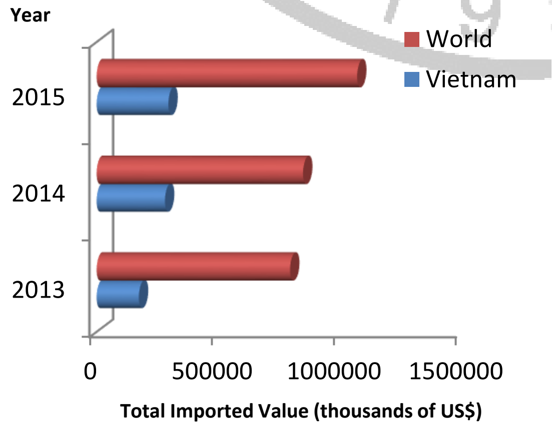


HS Code	Product Label
'0904110020	PEPPER OF THE GENUS PIPER, NEITHER CRUSHED NOR GROUND, BLACK
'0904120000	PEPPER OF THE GENUS PIPER, CRUSHED OR GROUND
'0904110040	PEPPER OF THE GENUS PIPER, NEITHER CRUSHED NOR GROUND, WHITE

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 10: Total Imported Value Vietnam vs. World (HS Code 0904)



The total imported value for this HS Code is growing during the three year period examined, presenting a strong and stable presence in the US market.

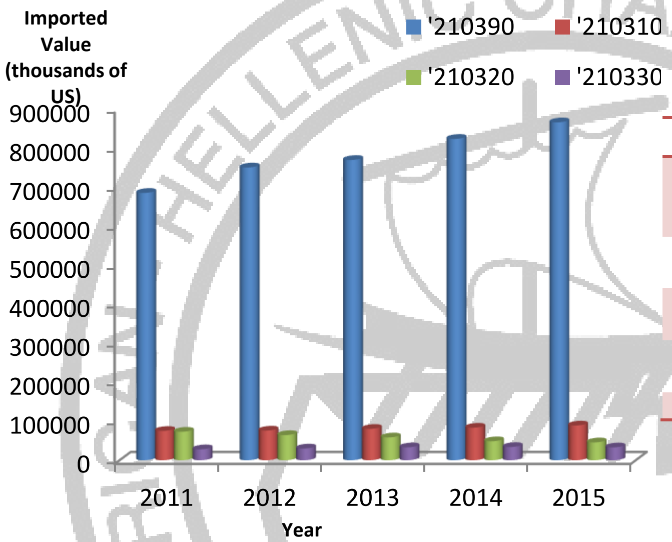
Vietnam differentiates its exports from India and the South American exporters, thus being able to remain competitive.

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

2.2. Sauces, mixed condiments & mixed seasonings (HS Code 2103)

Sauces and mixed condiments or seasonings in the US overall present a growing trend in the US, as a result of increased familiarity of US consumers with the spicy South American markets and cuisines. Figure 11 below indicates that the importing market for sauces, condiments and seasonings relies heavily on HS Code 210390 and is the only sub-category which maintains a stable position. Soya sauces and tomato sauces are of minor importance in this market, which may be unexpected but suggests that the US citizens are relatively not so accustomed to Asian tastes in comparison to the South American.

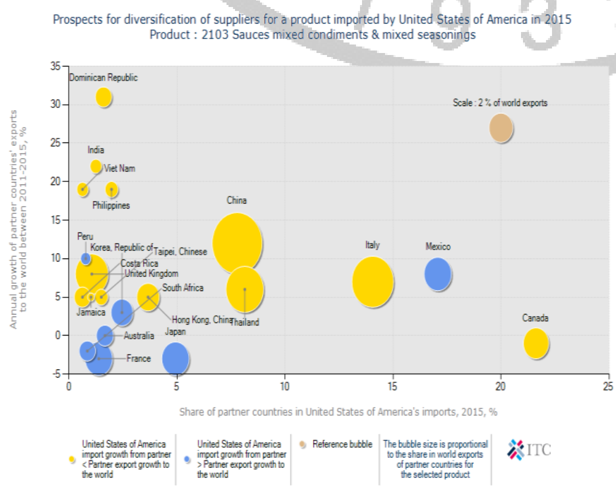
Figure 11: US Imported Value for HS Code 2103



HS Code	Product Label
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings
'210310	Soya sauce
'210320	Tomato ketchup and other tomato sauces
'210330	Mustard flour and meal and prepared mustard
Source: International Trade Center (ITC)	

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 12: Diversification of Suppliers in the USA for HS Code (2015)



The diversification of suppliers in 2015 for this category is dominated by the neighboring countries of Mexico and Canada.

The Asian competitors are also found amongst the leading players of the market.

Italy is the strongest European player.

Source: International Trade Center (ITC)

Tables 3 and 4 summarize the growth of the respective market for the given time period 2011 -2015 in monetary and quantitative terms for the top importers to the US market. In terms of value Canada repeatedly holds the leading position and a relatively low imported quantity, indicating that there is a competitive advantage in terms of its geographical position and the North Atlantic Free Trade Agreement (NAFT) which exists between the two countries.

In the same respect the NAFTA has encourage trade between the US and Mexico, which has stably grown each year, placing it in second position in both monetary and quantity terms. Italy is the only European country amongst the leading players analyzed in the following section, along with the markets of Canada and Mexico.

Table 3: Imported Value by Country to the USA

HS Code: 2103 (Sauces mixed condiments & mixed seasonings)
Unit: thousands of US$

Exporters	2011	2012	2013	2014	2015
World	864,182	923,162	943,653	991,323	1,035,415
Canada	233,204	250,690	232,646	227,081	223,922
Mexico	125,716	130,346	145,408	168,737	176,838
Italy	110,068	118,521	125,992	138,922	145,636
Thailand	69,642	79,090	84,781	89,157	84,338
China	59,385	68,527	68,153	70,673	80,694

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

Table 4: Imported Quantity by Country to the USA

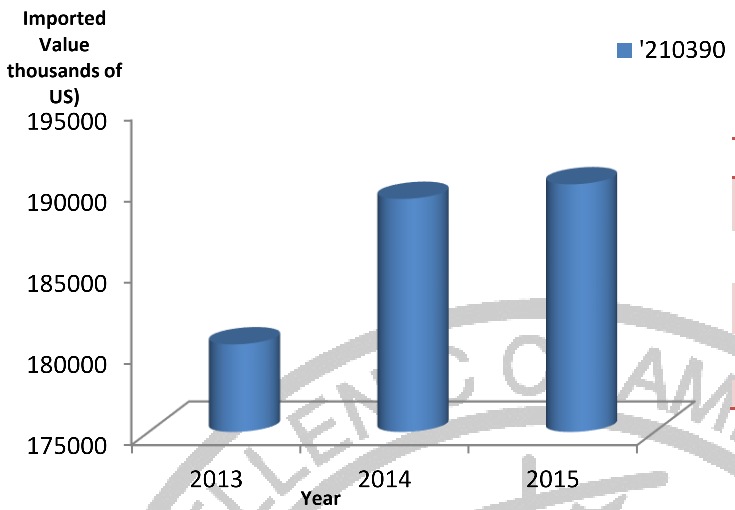
HS Code: 2103 (Sauces mixed condiments & mixed seasonings)
Unit: tons

Exporters	2011	2012	2013	2014	2015
World	493,496	490,698	496,914	502,757	538,537
Italy	108,000	112,502	117,223	118,704	134,212
Mexico	87,704	87,987	88,015	90,093	95,885
Canada	104,472	93,160	88,297	86,511	82,055
China	49,524	53,655	51,904	52,672	57,788
Thailand	38,867	40,407	43,455	44,907	43,212

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

Canada

Figure 13: Bilateral Trade between USA and Canada HS Code 210390 (2013 – 2015)



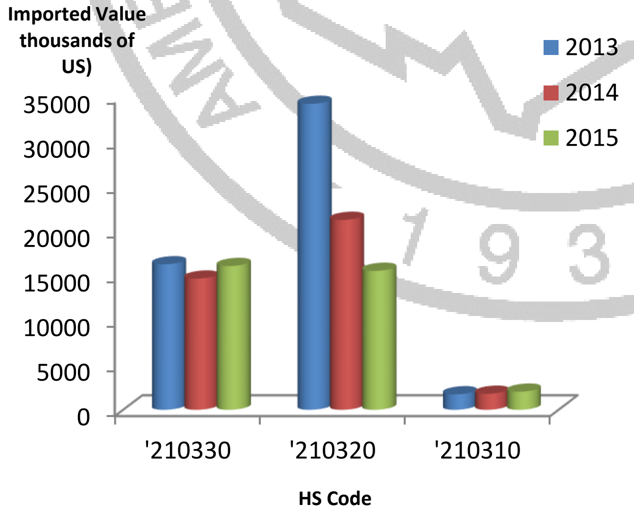
HS Code	Product Label
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings
'210330	Mustard flour and meal and prepared mustard
'210320	Tomato ketchup and other tomato sauces
'210310	Soya sauce

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

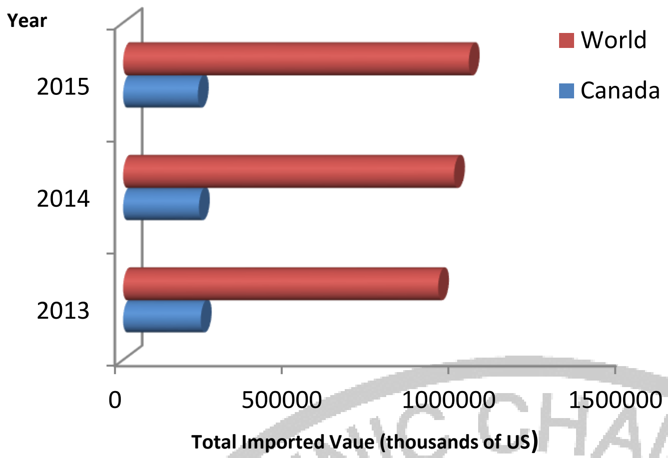
The significant growth of the market can be identified in 2014, when the Canadian market for mixed condiments and seasonings under HS Code 210390 as well as mustard flour and prepared mustard under HS Code 210330 rapidly increased. The imported value for the latter product in fact fell dramatically during the following year, while the demand for HS Code 210390 remained stable

Figure 14: Bilateral Trade between USA and Canada HS Code 2103(2013 – 2015)



Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 15: USA Total Imported Value Canada vs. World (HS Code 2103)



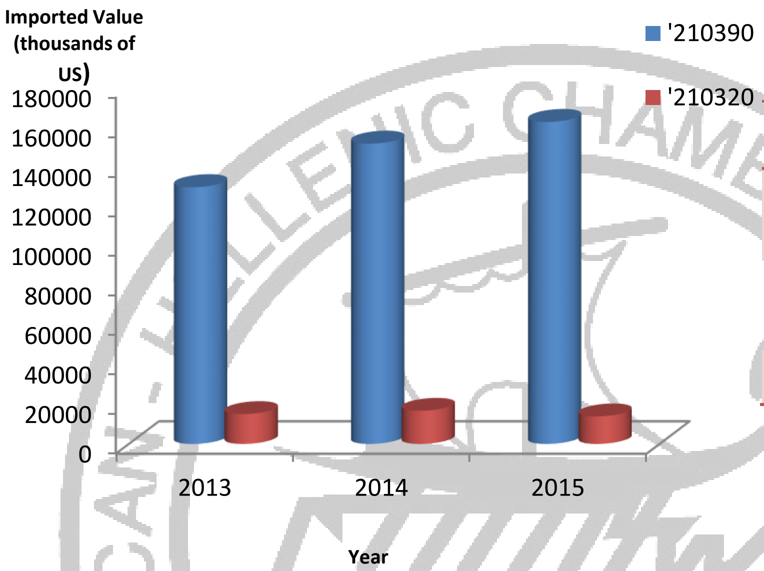
Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 15 indicate that the dominant position of the Canadian market for HS Code 2013 during the given period, which in 2015 reaches a value superior to $200,000.

Mexico

Mexico is Canada's major competitor in the market for sauces, condiments and seasonings, particularly because it exports the same HS Codes to the US, i.e. 210390 and 210330. The top exported HS Codes are illustrated in figure 16.

Figure 16: Bilateral Trade between USA and Mexico HS Code 210390 (2013 – 2015)

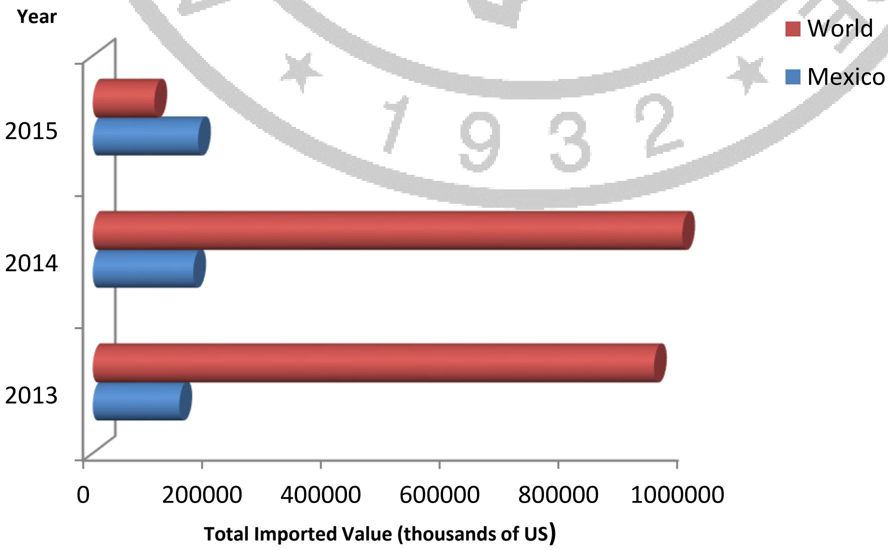


HS Code	Product Label
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings
'210330	Mustard flour and meal and prepared mustard

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 17: USA Total Imported Value Mexico vs. World (HS Code 2103)

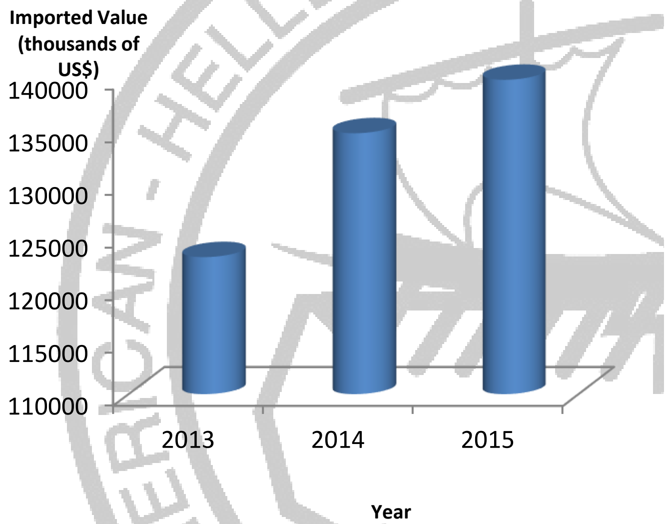


Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Italy

Italy is an interesting market to examine; since it has a European market structure, which consequently better represents the Greek market and it potential in the US. Similarly to Canada and Mexico, Italy also manages to remain competitive by exporting sauces, seasonings and condiments under HS Code 210390 to the US.

Figure 18: Bilateral Trade between USA and Italy HS Code 210390(2013 – 2015)



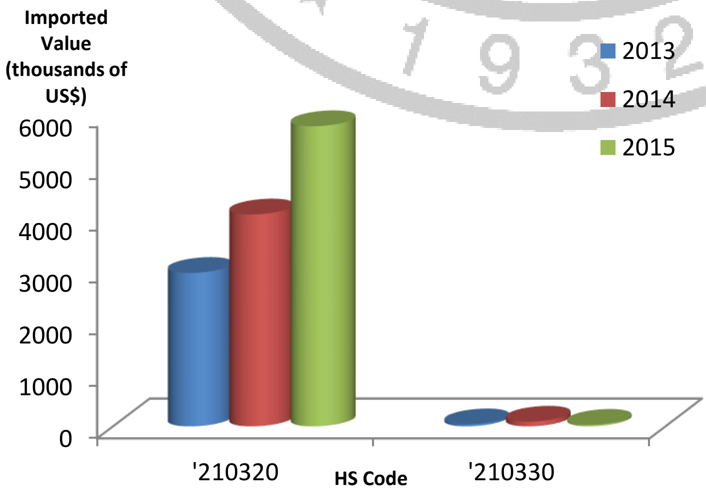
Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Sauces and condiments (HS Code 210390) and tomato ketchup and other tomato sauces (HS Code 210320).

Both follow an upward trend reaching a value of $140,000 and $6,000 respectively in 2015.

There is a high potential for the Italy to dominate the US market by specializing in the exportation of products such as tomato sauces in which Italy has a competitive advantage.

Figure 19: Bilateral Trade between USA and Italy HS Code (2013 – 2015)



HS Code	Product Label
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings
'210330	Mustard flour and meal and prepared mustard
'210320	Tomato ketchup and other tomato sauces
'210310	Soya sauce

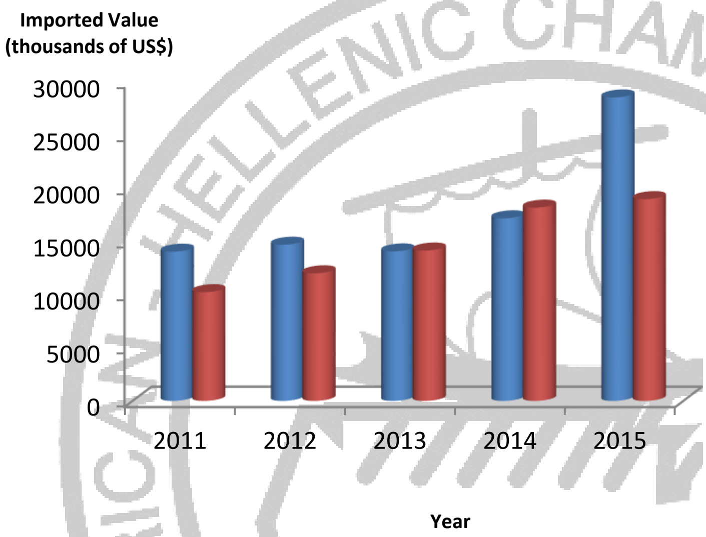
Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

2.3. Tomatoes prepared or preserved (HS Code 2002)

Tomatoes in the US are available in their various forms and are becoming increasingly popular, particularly with the growing concern of obesity in the US and the awareness of the advantages of the Mediterranean diet. Tomatoes are therefore increasingly used in the preparation of food at home, at restaurants and canteens and the public sector. From figure 20 it can be deducted that the tomatoes which are prepares or preserved (i.e. HS Code 200290) are imported to the US in much higher quantities than those which are whole or in pieces.

Figure 20: USA Imported Value Top HS Codes 2002 (2011-2015)



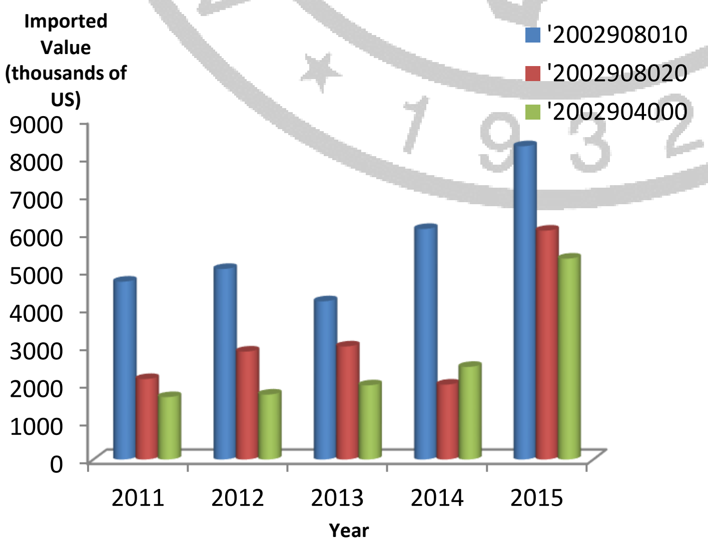
HS Code	Product Label
'200290	Tomatoes nes, prepared or preserved other than by vinegar or acetic acid
'200210	Tomatoes, whole/in pieces prepared/preserved o/t by vinegar/acetic acid

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

The most highly imported sub-codes to the US market for prepared or preserved tomatoes are presented in figure 21. Tomato paste is the fastest growing category.

Figure 21: USA Imported Values HS Code 2002 (2011 -2015)

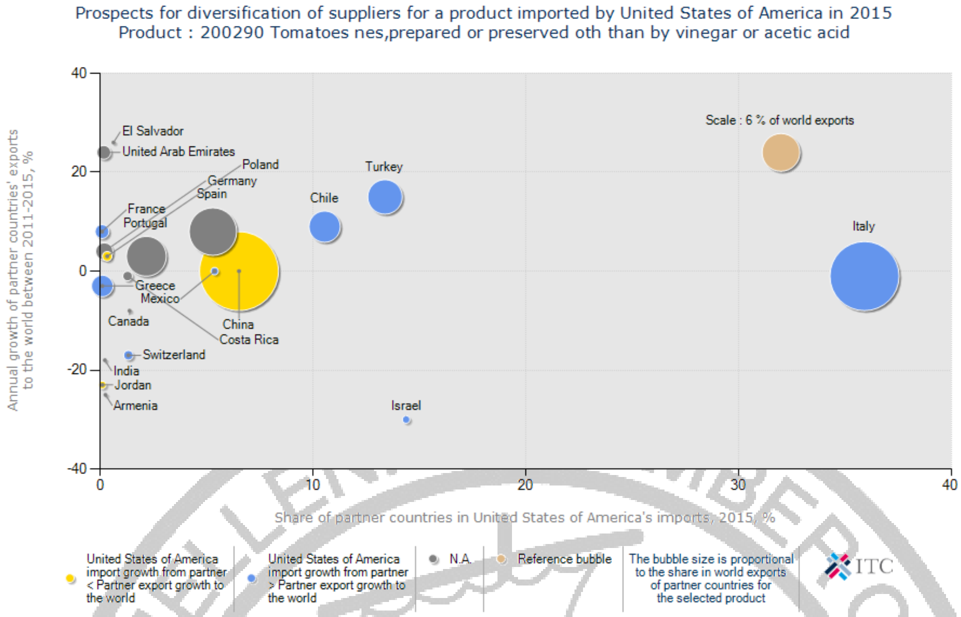


HS Code	Product Label
'2002908010	Tomato paste, in containers holding less than 1,4 kg
'2002908020	Tomato paste, in containers holding 1,4 kg or more
'2002904000	Tomatoes, nesoi, prepared or preserved otherwise than by vinegar or acetic acid, in powder

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 22: Diversification of Suppliers in the USA for HS Code 200290 (2015)



Source: International Trade Center (ITC)

The global diversification of suppliers in 2015, for this category of tomatoes is presented in the figure 22. Italy's dominant position is evident capturing nearly ½ of the total importing market.

According to figure 22 the rest of the importing market is fragmented and there are numerous small players which are mainly from Asia and some part of the Mediterranean and Western Europe. South American countries such as Chile and Cost Rica also contribute minimally to this market.

Table 5: Imported Value by Country to the USA

HS Code: 200290(Tomatoes nes, prepared or preserved other than by vinegar or acetic acid)
Unit: thousands of US$

Exporters	2011	2012	2013	2014	2015
World	14,030	14,684	14,055	17,166	28,529
Italy	5,945	6,126	6,481	8,080	10,250
Israel	1,852	2,280	2,300	3,185	4,104
Turkey	1,383	1,499	1,523	1,530	3,820
Chile	400	542	410	604	3,011
China	2,356	1,933	1,240	1,237	1,862

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

Table 6: Imported Quantity by Country to the USA

HS Code: 200290(Tomatoes nes, prepared or preserved other than by vinegar or acetic acid)
Unit: tons

Exporters	2011	2012	2013	2014	2015
World	10,507	10,188	8,998	10,773	16,766
Italy	4,343	3,858	3,730	4,915	5,842
Turkey	584	838	874	904	2,546
Chile	588	580	442	486	2,264
China	2,513	2,037	1,238	1,228	1,850
Israel	820	1,148	990	1,217	1,477

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

- Israel grew by 80% in terms of quantity and by 121% in monetary terms holding the second position after Italy

- Chile and China are the only two countries amongst the top five importers which are from outside the Mediterranean basin and in 2015 capture 13,5% and 11% of the market respectively in 2015 measured in tons

- In terms of volume Italy grew by 34,5% during the given period

- Turkey more than quadrupled in size in terms of tons between 2011 and 2015

- The Chinese market contracted by 26,4%

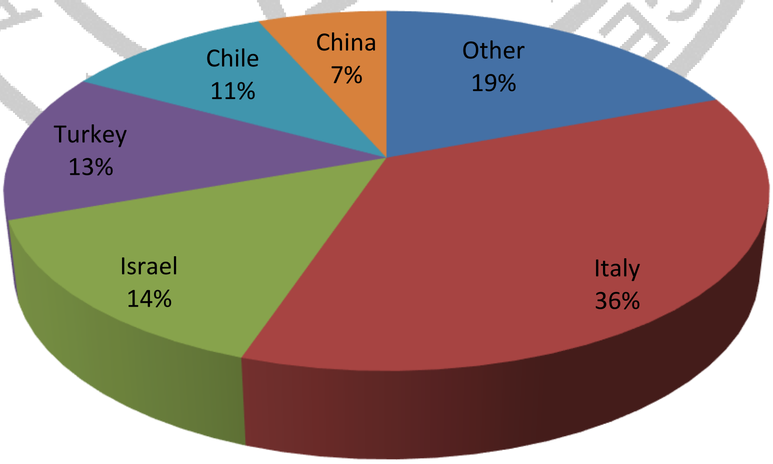
Table 7: Imported Growth in Value by Country to the USA

HS Code: 200290(Tomatoes nes, prepared or preserved other than by vinegar or acetic acid)
Unit: Percentage (%)

Exporters	2011-2012	2012-2013	2013-2014	2014-2015	Imported value in 2015 (thousands of US$)
World	5	-4	22	66	28,529
Italy	3	6	25	27	10,250
Israel	23	1	38	29	4,104
Turkey	8	2	0	150	3,820
Chile	36	-24	47	399	3,011
China	-18	-36	0	51	1,862

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

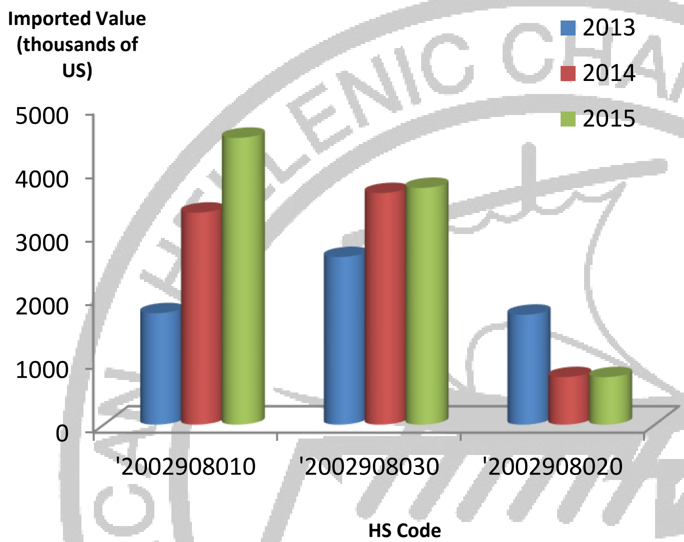
Figure 23: Major Exporters to the USA HS Code 200290 (2015)



Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Italy

Figure 24: Bilateral Trade between USA and Italy HS Code 200290 (2013 – 2015)



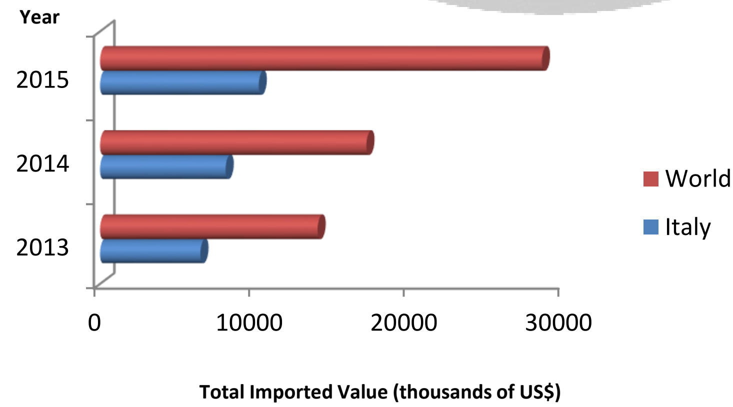
HS Code	Product Label
'2002908010	TOMATO PASTE, IN CONTAINERS HOLDING LESS THAN 1.4 KG
'2002908030	TOMATO PUREE, IN CONTAINERS HOLDING LESS THAN 1.4 KG
'2002908020	TOMATO PASTE, IN CONTAINERS HOLDING 1.4 KG OR MORE

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Tomato paste in small containers is the most highly imported HS Code between 2013 and 2015 reaching a value of $5,000 in 2015. Tomato puree is the second most highly imported HS Code which has stabilized at an imported value of $4,000 since 2014. On the contrary to the previously two mentioned product large containers of tomato paste from Italy are decreasing in value.

Figure 25: USA Total Imported Value Italy vs. World HS Code 200290 (2013 -2015)

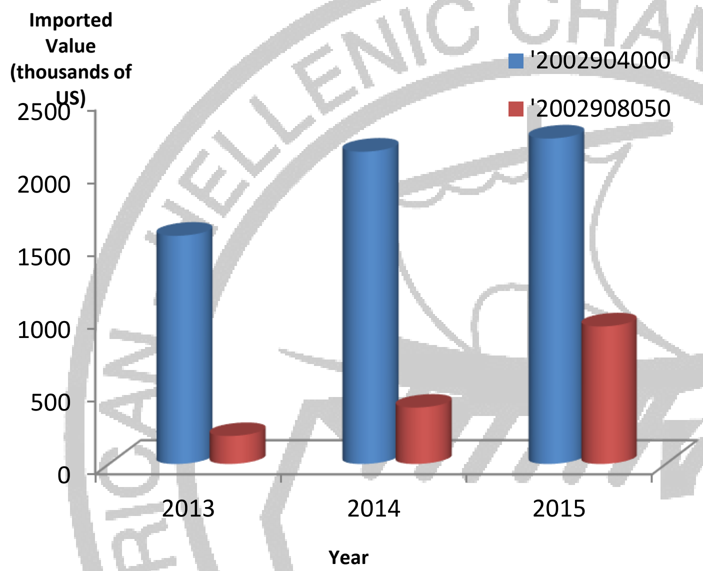


Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Israel

Israel has doubled its importing value to the US between 2011 and 2015 of HS Code 200290 and therefore is Italy's major competitor in the US market. It is interesting to examine the bilateral trade patterns so that between Israel and the US so that the source of the increased value can be determined.

Figure 26: Bilateral Trade between USA and Israel HS Code 200290 (2013 – 2015)

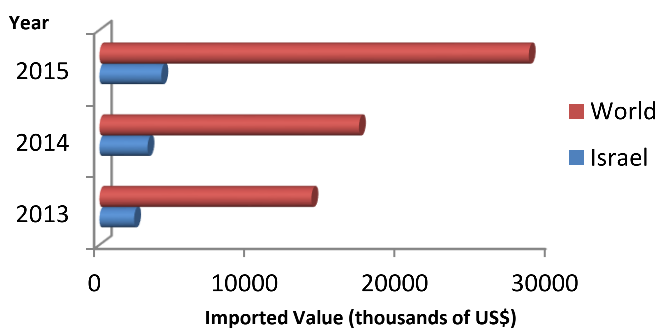


HS Code	Product Label
'2002904000	TOMATOES, NESOI, PREPARED OR PRESERVED OTHERWISE THAN BY VINEGAR OR ACETIC ACID, IN POWDER
'2002908050	TOMATOES, NESOI, PREPARED OR PRESERVED OTHERWISE THAN BY VINEGAR OR ACETIC ACID, OTHER
Source: International Trade Center (ITC)	

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

For this reason figure 26 breaks down HS Code 200290 into its sub-codes which indicate that between 2013 and 2015, the imported value for tomatoes under the category 2002904000 increased by approximately 1/3 of its value and 2002908050 reached a value of $1000 in 2015. Both these products consist of tomatoes which prepared and preserved in powder or other substance.

Figure 27: USA Imported Value Israel vs. World HS Code 200290 (2013 -2015)



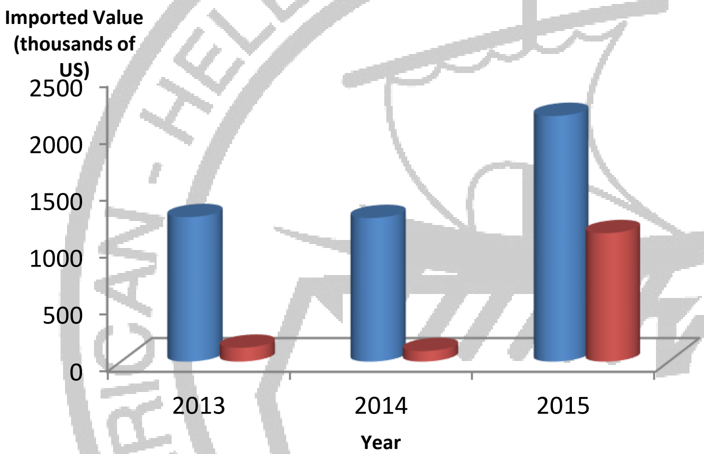
The US importing market is growing, proportionally with the Israeli market which is becoming a strong competitor for Italy.

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Turkey

During the five year period 2011 – 2015, Turkey managed to significantly increase its imported value and quantity to the US. Tomato paste in containers less than 1.4 kg was the primarily imported HS Code in the category. However it the drastic increase in imports to the US between 2013 and 2015 of the containers weighing more than 1.4 kg (under HS Code 2002908020) manages to keep Turkey amongst the top competitors.

Figure 28: Bilateral Trade between USA and Turkey HS Code 200290 (2013 – 2015)

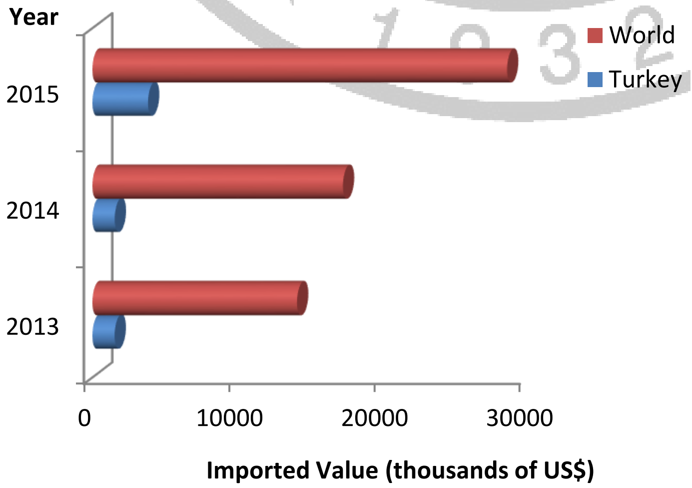


HS Code	Product Label
'2002908010	TOMATO PASTE, IN CONTAINERS HOLDING LESS THAN 1.4 KG
'2002908020	TOMATO PASTE, IN CONTAINERS HOLDING 1.4 KG OR MORE

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 29: USA Imported Value Turkey vs. World HS Code 200290 (2013 -2015)



Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Chapter 3| USA Market

Table 8: USA Exported Value by Country to World

HS Code: 0904 (Pepper, peppers and capsicum)
Unit: thousands of US$

Importer	2011	2012	2013	2014	2015
World	51,494	63,944	67,025	71,551	77,702
Canada	30,915	38,853	42,220	43,481	49,108
Mexico	3,232	5,057	5,471	4,841	7,290
Republic of Korea	1,360	1,200	1,433	1,386	1,806
United Kingdom	371	184	928	1,937	1,555
Dominican Republic	614	651	810	1,019	1,471

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

Table 9: USA Exported Value by Country to World

HS Code: 200290(Tomatoes nes, prepared or preserved other than by vinegar or acetic acid)
Unit: thousands of US$

Importer	2011	2012	2013	2014	2015
World	281,503	277,062	379,552	444,082	416,803
Mexico	42,670	32,828	44,007	47,147	59,824
Canada	45,488	42,123	44,321	52,491	49,054
Netherlands	10,293	14,507	18,689	23,189	42,510
Italy	26,578	45,458	70,714	89,163	30,070
Japan	16,446	17,149	15,929	17,544	27,952

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

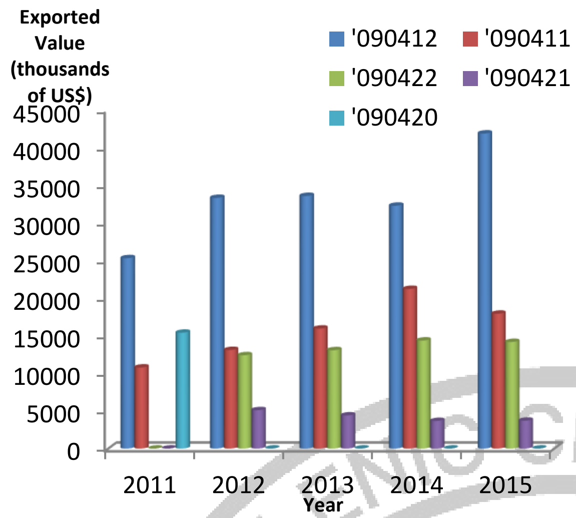
Table 10: USA Exported Value by Country to World

HS Code: 2103 (Sauces, mixed condiments & mixed seasonings)
Unit: thousands of US$

Importer	2011	2012	2013	2014	2015
World	1,104,782	1,212,637	1,340,208	1,500,624	1,647,510
Canada	443,408	479,305	539,649	624,728	686,107
Mexico	133,252	144,245	167,672	186,513	220,796
Saudi Arabia	38,778	38,750	43,160	47,213	54,436
Japan	35,234	45,692	43,885	48,193	53,522
Australia	32,423	38,178	40,027	41,725	45,831

Source: International Trade Center (ITC) calculations based on UN COMTRADE statistics

Figure 31: USA Exported Value by Product HS Code 0904 (2011 -2015)



HS Code	Product Label
'090412	Pepper of the genus Piper, except cubeb pepper, crushed or ground
'090411	Pepper of the genus Piper, ex cubeb pepper, neither crushed nor ground
'090422	Fruits of the genus Capsicum or of the genus Pimenta : Crushed or ground
'090421	Fruits of the genus Capsicum or of the genus Pimenta : Dried, neither crushed nor ground
'090420	Fruits of the genus Capsicum or Pimenta, dried, crushed or ground

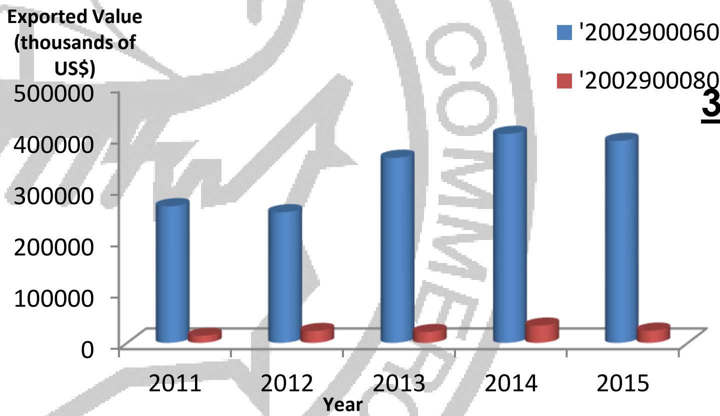
Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 32: USA Exported Value by Product HS Code 200290 (2011 -2015)

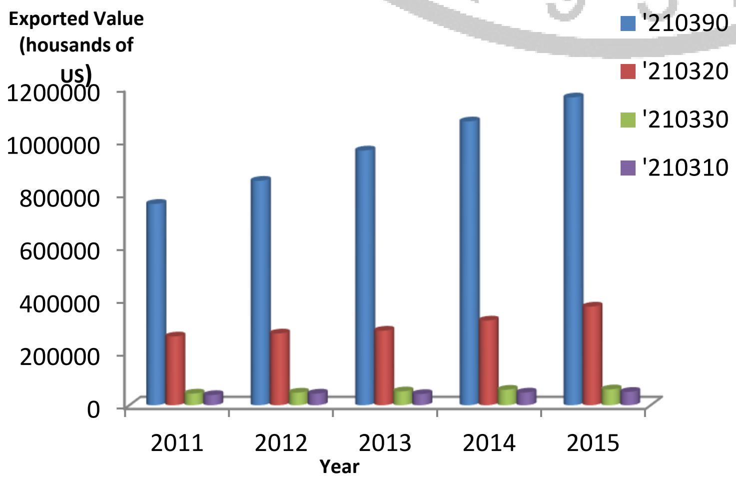
HS Code	Product Label
'2002900060	TOMATO PASTE
'2002900080	TOMATOES, NESOI, (INCLUDING TOMATO PUREE) PREPARED OR PRESERVED OTHERWISE THAN BY VINEGAR OR ACETIC ACID

Source: International Trade Center (ITC)



Source: TradeUSA- US CENSUS BUREAU – UN COMTRADE

Figure 33: USA Exported Value by Product HS Code 2103



HS Code	Product Label
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings
'210320	Tomato ketchup and other tomato sauces
'210330	Mustard flour and meal and prepared mustard
'210310	Soya sauce

Source: International Trade Center (ITC)

Source: TradeUSA- US CENSUSBUREAU – UN COMTRADE

Chapter 4 | Consumer Trends

4.1. Mega Trends

According to the Euromonitor International Report (2015) the following consumer trends have been identified:

Processed Fruits and Vegetables

- In 2015 the current value and the retail volume of both frozen and shelf stable processed fruits and vegetables remained stable

- Retail current value and sales in 2015 are estimated at $14.5 billion and 4,600 tonnes, respectively
  Sales of Processed Fruit and Vegetables by Category 2010 -2015 (% Volume Growth)

% volume growth

	2014/15	2010-15 CAGR	2010/15 Total
Shelf Stable Fruit and Vegetables	0.2	-1.0	-5.0
- Shelf Stable Beans	1.1	0.8	4.2
- Shelf Stable Fruit	1.7	-2.5	-11.9
- Shelf Stable Tomatoes	2.0	-0.1	-0.6
- Shelf Stable Vegetables	-1.2	-1.4	-6.8
Processed Frozen Fruit and Vegetables	0.5	-0.3	-1.3
- Frozen Fruit	4.2	1.8	9.5
- Frozen Processed Potatoes	-0.8	-0.7	-3.3
- Frozen Processed Vegetables	0.0	-0.7	-3.7
Processed Fruit and Vegetables	0.3	-0.8	-3.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Source: Euromonitor International

- Sustaining demand for canned tomatoes for homemade sauces due to the US citizens love for the Italian and Mediterranean cuisines

- Shelf stable tomatoes grew by 2% in terms of volume in 2015 and 1% in current value growth

- The same category presented a 3% volume growth in the foodservice channel

- Shelf stable fruit and vegetables remained flat, with the fall coming from a 2% decline in the shelf stable vegetables

- Canned and shelf stable beans follow a similar path, partly due to the large number of South American (Mexican) immigrants in the US

- Until 2020 the expected value growth is estimated at 2% overall and a volume decline

Sauces, Dressings & Condiments

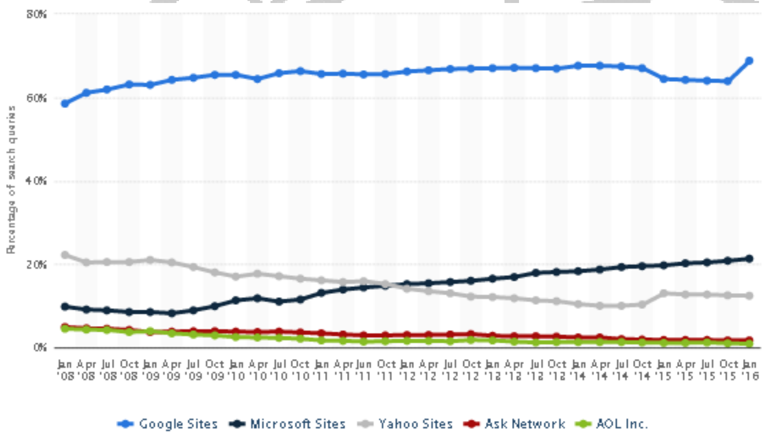
- In 2015 the market has grown by 2% reaching a value of $21.6 billion
- Competition is increasing because the strongest companies are expanding into new product areas
- Consumer demand has resulted in an increase of the demand for herbs and spices, which is growing at a faster rate (4% in terms of current value during this year)
- Rapidly growing Asian and South American communities in the US greatly influences the consumer trends and have led to an increase in the use of spices and seasonings in the home
- In 2105 table sauces are the most popular category, with salad dressings (value sales of $2,6 billion), mayonnaise (1,8 billion) and Ketchup ($836 million)
- Chili sauces have the strongest current value growth at 6% and is expected to remain between 2015 -2020
- This trend is strongly influenced by the Millennial consumers who have a strong preference for spicy flavours and combine them with non-traditional foods like pizza
- Current value of herbs and spices has grown by 24% between 2010 and 2015
- Supermarkets remained the dominant retail channel for sauces, dressings and condiments, however they are losing market share from hypermarkets and other cheaper alternatives such as internet retailers
- US consumers have a preference for organic and natural sauces
- Sauces and condiments are a category of products which enable the consumer to prepare more flavorful dishes when eating meals at home (both frozen meals and shelf stable ready meals), a trend which is also expected to grow during the coming period
- By 2020 the market is expected to grow by 4% in value terms and to reach a sales value of US$22.4 billion and retail sales are expected to increase by 3% between 2015 – 2020

4.2. Digital Footprint

In order to understand average consumer tendencies in a complete manner, it is essential to consider the influence of modern technological advances and research methods since technology has become an essential tool in the everyday life of US consumers. The internet is a major way through which the average US consumer is informed. On average in 2008, US consumers' daily media consumption was approximated at 100,500 words or almost 12 hours, according to research at the University of California (Measuring Consumer Information, 2012).

Google was rated as the top US search engine provider for the past eight consecutive years[2] and in the beginning of 2016, Google as the market leader contributed to 68.8% of the total searches in the US (ibid.).

Figure 33: Online Queries per Search Engine (2008 -2015)



Source: Statista, 2016

"Google trends" is a useful tool which enables the user to calculate the popularity of the inserted term and is used in this section to analyze the online US consumer trends that are using Google as their search engine.

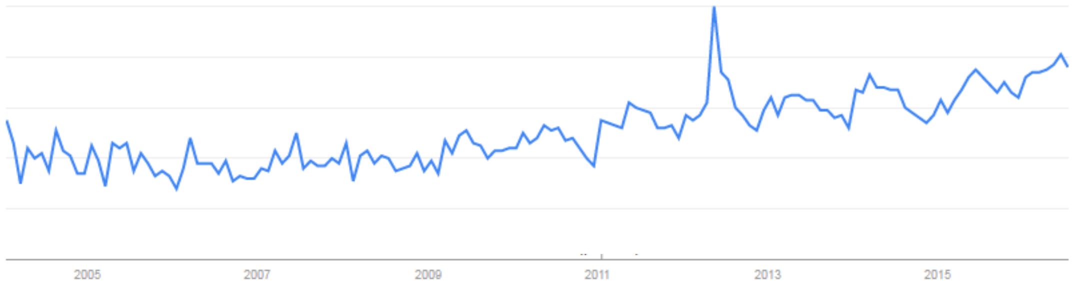
The method with which the number of searches is calculated is by dividing the number of queries for the keyword, by the total number of Google search queries. The results can be grouped geographically according to region, state, city or across time. They are updated on a daily basis.

There are inaccuracies which may occur (approximations and sampling issues) which have to be taken into consideration when the relative results are analyzed (http://whatis.techtarget.com/definition/Google-Trends).

A graphical representation for each keyword searched is presented and analyzed below.

Figure 34: «Condiments» empirically (2005 -2015)

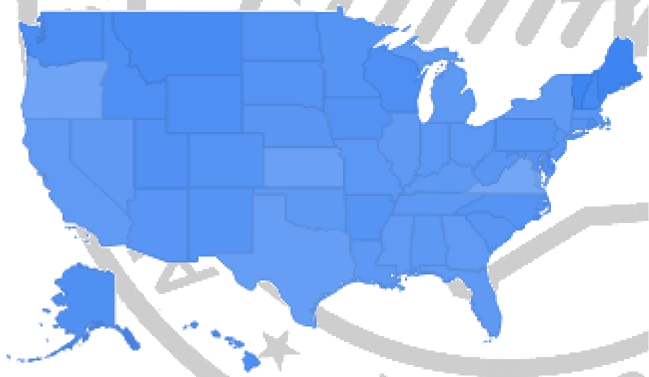
[2] Statista, 2016



Source: Google Trends, 2016

The linear trend for «condiments» across the 10 year period follows an upward path and an annual cycle. There is a distinct peak in the winter and festive season of 2012 which indicates that during that period, an increased number of US citizens searched online for condiments.

Figure 35: «Vegetables» by State



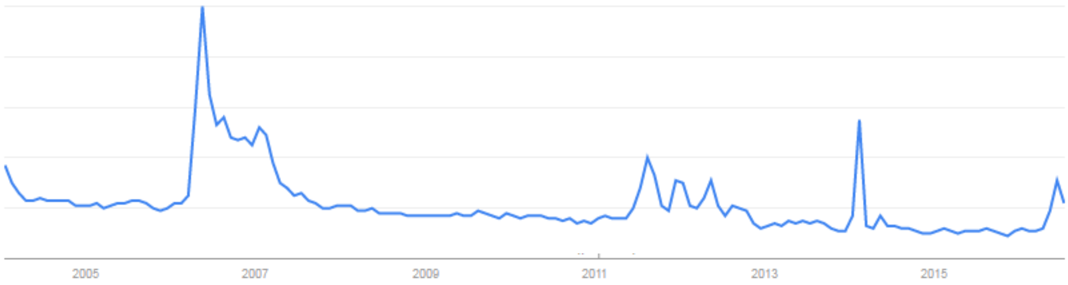
Source: Google Trends, 2016

Empirically the term «vegetable» also faces an increasing trend between 2005 and 2015, which follows an annual cycle peaking in the summer months of each year.

Figure 35, presents the geographical result according to state. The dark shade of blue indicates that the keyword was intensely searched throughout the US during 2015.

This trend suggests that the average US consumer is becoming increasingly aware and informed about the advantages of a healthy lifestyle.

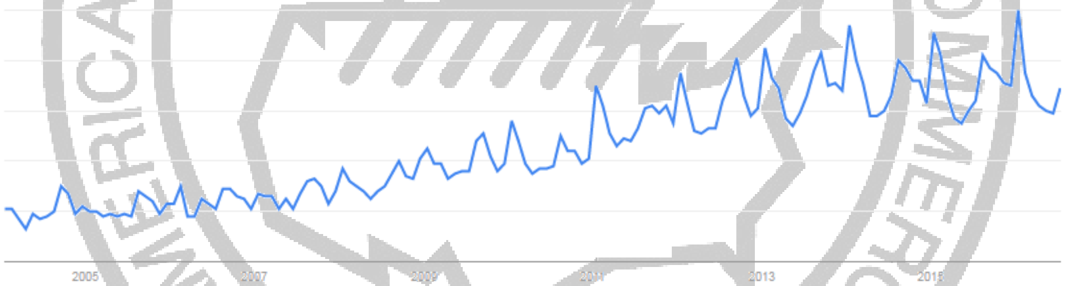
Figure 36: «Red Peppers» empirically (2005 -2015)



Source: Google Trends, 2016

«Red Peppers» do not follow a standard trend, whoever two peaks indicating an increased tendency amongst US consumers to search for red peppers can be identified in 2006 and 2014, otherwise the frequency is relatively low during the given period.

Figure 37: «Tomato Paste» empirically (2005 -2015)

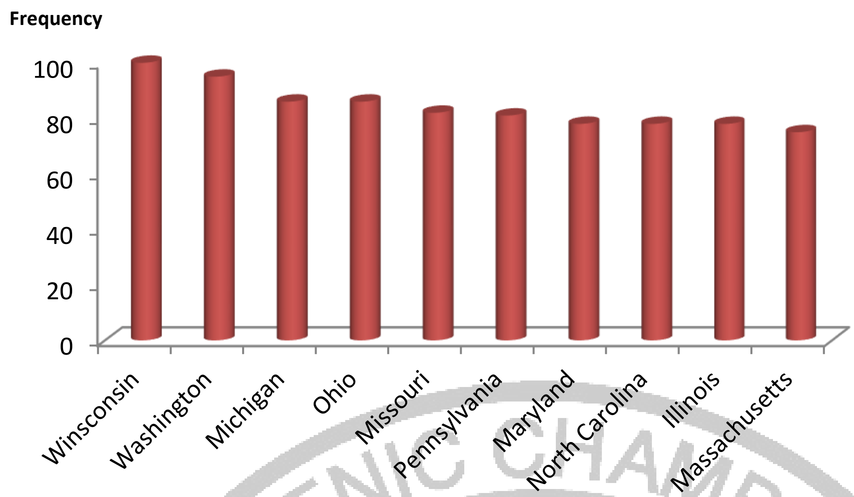


Source: Google Trends, 2016

«Tomato Paste» is a keyword of particular interest to the average US consumer who chooses to search for information online. Increased globalization, trade and migration allows consumers to become familiar with different cultures and lifestyles, a trend which also leads to familiarization with foreign cuisines, tastes and demand for their products. Tomato paste is one such example.

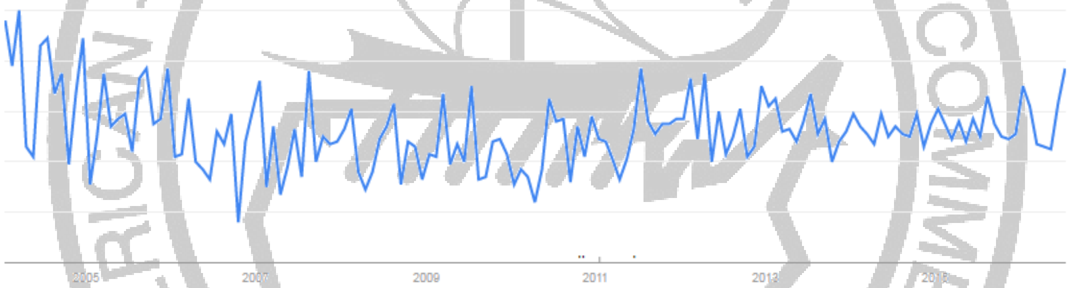
The citizens located in states located on international borders or major ports which have high-quality infrastructure and connections, are more likely to be familiar with foreign cultures and cuisines.

Figure 38: «Tomato Paste» by state



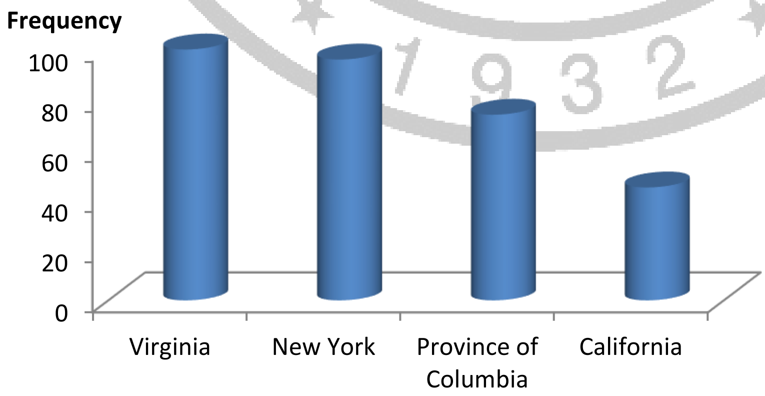
Source: Google Trends, 2016

Figure 39: «Olive Paste» empirically (2005 -2015)



Source: Google Trends, 2016

Figure 40: «Stuffed Peppers Recipes by state



Source: Google Trends, 2016