



Global Mustard Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 4.8 bn
Forecast (2031)	USD 6.4 bn
CAGR (2021-2031)	5.1%
Study period	2021-2031
Largest region	Europe · 34.8%
Fastest-growing region	Asia-Pacific · 6.3%
Market concentration	Moderate
Licence	Individual / Company

The global mustard market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe retained the largest regional position with XX% of market value, supported by entrenched consumption of Dijon, wholegrain, medium-hot and sweet mustard. Asia-Pacific is the fastest-growing region at a XX% CAGR as organized retail, Western-style foodservice and locally adapted flavors broaden the category. Premium recipes, clean-label formulations, convenient squeeze packaging and mustard-based sauces are creating the strongest value-growth opportunities.

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Executive summary

The global mustard market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe retained the largest regional position with XX% of market value, supported by entrenched consumption of Dijon, wholegrain, medium-hot and sweet mustard. Asia-Pacific is the fastest-growing region at a XX% CAGR as organized retail, Western-style foodservice and locally adapted flavors broaden the category. Premium recipes, clean-label formulations, convenient squeeze packaging and mustard-based sauces are creating the strongest value-growth opportunities.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global mustard market value reached USD XXX billion in 2025 and is forecast to reach USD XXX billion in 2031.
- Europe generated XX% of 2025 market value, ahead of North America at XX%.
- Prepared mustard accounted for XX% of market value, while mustard flour and meal represented XX%.
- Yellow mustard led product-type revenue with a XX% share, while sweet and flavored mustard is forecast to grow fastest at XX% annually.
- Retail channels represented XX% of 2025 sales, supported by supermarkets, discounters, specialty stores and e-commerce.
- World exports under HS 210330 reached USD XXX million and XXX tonnes in 2024, with France the largest exporter by value.
- Statistics Canada recorded Canadian mustard-seed production of XXX tonnes in 2024 and projected XXX tonnes for 2025.
- The five largest mustard suppliers controlled XX% of global 2025 value, leaving substantial room for regional brands, private label and specialist producers.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Mustard Market Trends and Growth Drivers

Mustard occupies a defensible position in the global condiment system because it combines low recipe cost, strong sensory impact and broad compatibility with meat, bakery, vegetable and prepared-food applications. Demand is distributed across household retail, restaurants and industrial processing, reducing dependence on any single consumption occasion.

Growth is increasingly value-led. Premium Dijon and wholegrain recipes, flavored variants and convenience packaging are lifting average selling prices, while modern retail and quick-service expansion recruit consumers in emerging markets. At the same time, private label restrains pricing in core yellow and medium-hot products.

Seed procurement is the industry's principal operating variable. Canadian and European crop conditions influence global availability, and harvest swings pass rapidly into flour and prepared-mustard costs. Producers with diversified sourcing, inventory discipline and flexible recipes hold a structural advantage during tight supply cycles.

Growth drivers

Premium Dijon and wholegrain trading-up

Consumers are moving from standard table mustard toward Dijon, wholegrain, organic and origin-led products that command higher unit prices. The shift is strongest in specialty retail, premium supermarkets and chef-led foodservice, where texture, provenance and wine-based recipes support a broader pricing ladder.

Foodservice menu expansion

Quick-service restaurants, sandwich chains and casual-dining operators are using mustard in signature sauces, marinades and limited-time offers. Centralized procurement and portion-controlled packaging translate menu adoption into recurring volumes for branded and private-label suppliers.

Clean-label flavor positioning

Mustard delivers acidity, pungency and emulsification with a short ingredient list and low fat content. Food manufacturers are deploying mustard flour and prepared mustard to strengthen flavor while simplifying formulations in dressings, plant-based foods, meats and ready meals.

Emerging-market retail modernization

Modern supermarkets, convenience chains and digital grocery platforms are increasing access to packaged condiments across Asia-Pacific and Latin America. Smaller packs, localized heat profiles and cross-merchandising with processed meat and snack products are accelerating household trial.

Flavor and format innovation

Honey, chili, truffle, fruit, beer and smoky mustard variants are extending the category into dipping and cooking occasions. Easy-squeeze closures, inverted bottles and dual-format packs improve convenience and help brands secure premium shelf positions.

Industrial formulation demand

Processed-meat, dressing, sauce and prepared-food manufacturers use mustard for flavor, binding and emulsification. Customized flour grades and bulk prepared formulations deepen supplier relationships and provide a stable business-to-business demand base.

Restraints

Mustard-seed crop volatility

Production is concentrated in a limited group of exporting origins, making processors sensitive to drought, acreage decisions and yield variability. Rapid changes in seed cost raise working-capital requirements and compress margins where retail contracts delay price recovery.

Mature core-market consumption

Mustard already has high household penetration in Western Europe and North America, limiting volume-led expansion in traditional formats. Suppliers must generate growth through premium mix, new occasions and share gains rather than relying on category recruitment alone.

Condiment substitution pressure

Hot sauces, flavored mayonnaise, barbecue sauces and hybrid dips compete directly for shelf space and meal occasions. Younger consumers frequently rotate among condiment types, increasing promotional requirements and shortening the commercial life of flavor extensions.

Allergen-control complexity

Mustard is a declared allergen in the European Union and Canada, requiring disciplined labeling, segregation and sanitation controls. Compliance raises operating costs for co-packers and multiproduct plants, particularly when mustard flour can migrate through shared dry-processing systems.

Mustard Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium Dijon and wholegrain trading-up	XXX	XXX	XXX
Foodservice menu expansion	XXX	XXX	XXX
Clean-label flavor positioning	XXX	XXX	XXX
Emerging-market retail modernization	XXX	XXX	XXX
Flavor and format innovation	XXX	XXX	XXX
Industrial formulation demand	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Mustard-seed crop volatility	XXX	XXX	XXX
Mature core-market consumption	XXX	XXX	XXX
Condiment substitution pressure	XXX	XXX	XXX
Allergen-control complexity	XXX	XXX	XXX

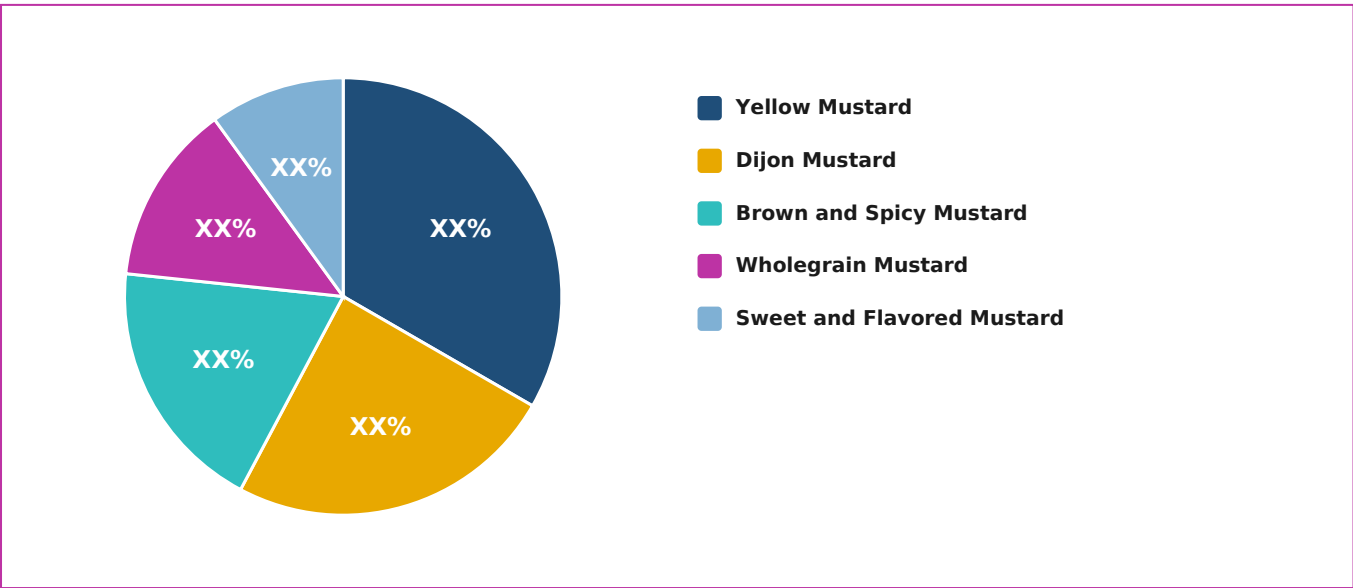
Source: XXX

Mustard Market Segmentation Analysis by Product, Form, Packaging and Channel

By Product Type

Yellow mustard remains the global volume anchor because of its affordability, mild profile and entrenched use in quick-service restaurants and household grilling. Dijon commands a higher average price and benefits from premium cooking applications, while wholegrain products gain from artisanal positioning and visible texture. Sweet, honey, chili, fruit and other flavored recipes are growing fastest as manufacturers target dipping, glazing and younger-consumer occasions.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Yellow Mustard	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dijon Mustard	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brown and Spicy Mustard	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wholegrain Mustard	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sweet and Flavored Mustard	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Prepared mustard dominates because it is ready to serve, supports extensive flavor differentiation and is distributed across every major channel. Mustard flour and meal form a smaller but strategically important business-to-business category used in sauces, meat processing, seasoning systems and dry mixes. Whole culinary seed serves pickling, spice retail and regional cooking applications, with growth supported by natural and minimally processed positioning.

Value by form, USD bn

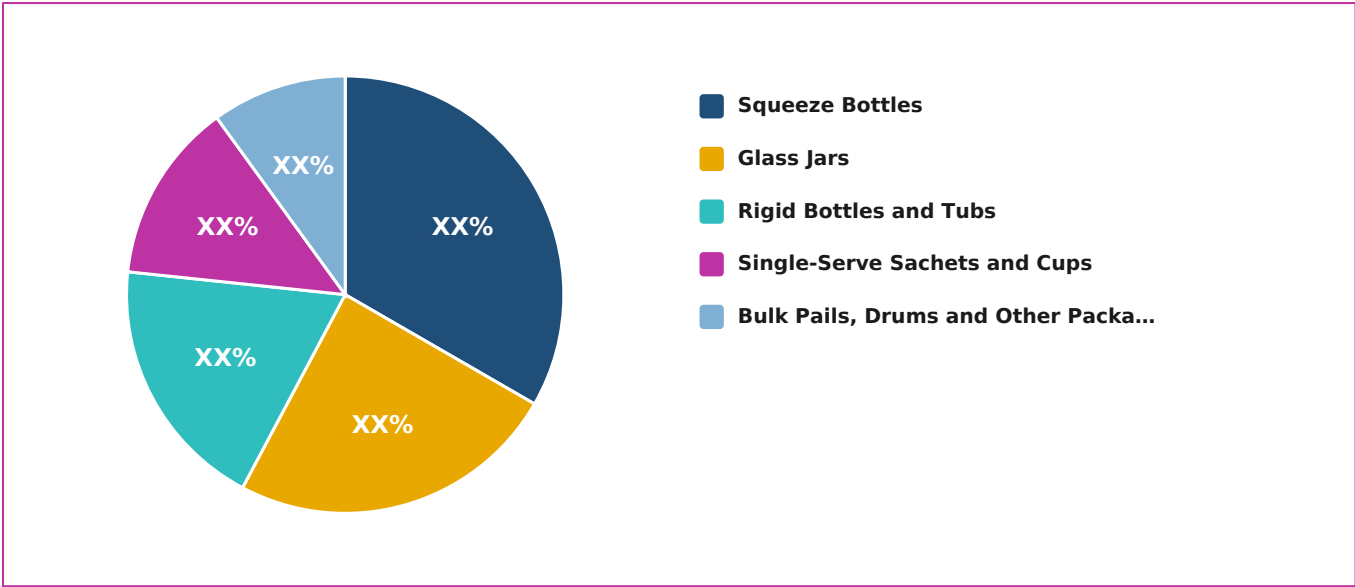
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Prepared Mustard	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mustard Flour and Meal	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Whole Culinary Mustard Seed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Squeeze bottles lead through convenience, portion control and strong visibility in household and foodservice settings. Glass jars remain central to Dijon, wholegrain and premium products because they communicate quality and preserve established European presentation cues. Sachets and cups are gaining with delivery, takeaway and institutional foodservice, while bulk pails and drums serve kitchens and industrial users.

Value share by packaging, 2025



Source: XXX

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Squeeze Bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Glass Jars	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rigid Bottles and Tubs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Single-Serve Sachets and Cups	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bulk Pails, Drums and Other Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Retail leads through the category's high household penetration and broad supermarket assortment, with e-commerce expanding access to premium and imported products. Foodservice growth is supported by quick-service expansion, delivery meals, stadiums and chef-led menu development. Industrial users purchase mustard flour and bulk prepared formulations for dressings, processed meats, ready meals and composite sauces.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and Ingredient	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

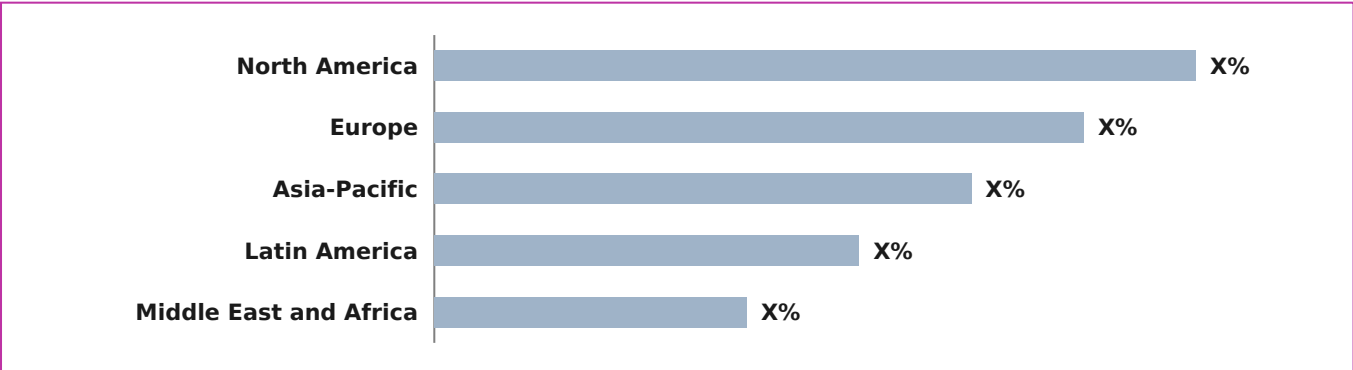
Mustard Market Regional Analysis and Country Outlook

Europe held XX% of global mustard value in 2025, reflecting deeply embedded consumption across France, Germany, the United Kingdom and Central Europe. France anchors the premium Dijon and wholegrain trade, while Germany supports large medium-hot and sweet-mustard categories through retail, foodservice and sausage consumption. Dense private-label participation keeps standard-product pricing competitive, but provenance, organic certification and artisanal texture sustain premium growth.

North America accounted for XX% of 2025 value, with the United States centered on yellow and spicy-brown mustard and Canada serving as both an important consumer market and a strategic seed origin. Branded leaders benefit from stadium, quick-service and grilling occasions, while food manufacturers create additional demand for mustard flour and bulk preparations. Crop variability in the Canadian Prairies remains a major determinant of processor procurement and pricing.

Asia-Pacific will grow at XX% annually through 2031, the fastest regional pace. China, India, Japan, South Korea and Australia present distinct demand patterns, ranging from industrial mustard ingredients and Western-style restaurant condiments to premium imported Dijon and karashi-type products. Latin America and the Middle East and Africa are also expanding from smaller bases as modern retail, burger chains and locally adapted spicy formulations increase category availability.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Mustard Market Competitive Landscape and Company Share

The global mustard market is moderately concentrated: the five largest suppliers generated XX% of 2025 value, while regional specialists, foodservice manufacturers and private-label producers retained a substantial collective position. McCormick leads through French's and regional brands, while Unilever Foods participates through Maille and Colman's, Kraft Heinz through Heinz and Grey Poupon, Develey through a broad European portfolio, and Conagra Brands through Gulden's.

Competition differs sharply by tier. Mass-market suppliers use distribution scale, foodservice contracts and squeeze-format visibility, whereas premium specialists compete through protected regional identity, recipe heritage, texture and glass packaging. Co-manufacturers such as Wisconsin Spice and vertically integrated regional processors influence the market through customized formulations, dry milling and private-label production.

The March 2026 agreement to combine Unilever Foods with McCormick is the most consequential structural development in the forecast period. Subject to closing, the transaction would place French's, Maille and Colman's within one flavor-focused group and intensify scrutiny of portfolio architecture, retailer negotiations and geographic brand allocation. Competitors are responding with premium innovation, local sourcing, packaging investment and sharper channel specialization.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
McCormick & Company, Inc.	XXX	XXX	XXX	XXX
Unilever Foods	XXX	XXX	XXX	XXX
The Kraft Heinz Company	XXX	XXX	XXX	XXX
Develey Senf & Feinkost GmbH	XXX	XXX	XXX	XXX
Conagra Brands, Inc.	XXX	XXX	XXX	XXX
Plochman, Inc.	XXX	XXX	XXX	XXX
Woeber Mustard Manufacturing Company	XXX	XXX	XXX	XXX
Silver Spring Foods, Inc.	XXX	XXX	XXX	XXX
Wisconsin Spice, Inc.	XXX	XXX	XXX	XXX
La Moutarderie Edmond Fallot	XXX	XXX	XXX	XXX

Source: XXX

Mustard Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031. Value expansion will outpace volume as premium recipes, packaging improvements and input-cost pass-through lift average realized prices, while baseline demand remains supported by mustard's established role in retail, foodservice and industrial formulations.

The strongest commercial outcomes will come from portfolios that bridge familiar core products and high-margin adjacent occasions. Yellow and medium-hot mustard will remain traffic-building staples, but sweet-hot, wholegrain, organic, reduced-sodium and culinary sauce formats will account for a rising share of incremental revenue. Suppliers with flexible production lines and access to multiple seed origins will be better positioned to manage crop shocks.

Asia-Pacific represents the leading geographic growth opportunity, while Europe remains the center of premium product development and North America remains critical for branded scale and foodservice. Under the upside scenario, faster restaurant expansion and sustained premiumization lift the 2031 market above USD XXX billion; a prolonged seed-cost shock and weak consumer spending would keep the market near USD XXX billion.

Opportunities

- Localized mustard flavors for Asian, Latin American and Middle Eastern cuisines
- Organic, reduced-sodium and additive-free formulations
- Single-serve and portion-control formats for foodservice
- Premium private-label and retailer-exclusive ranges
- Mustard-based cooking sauces, glazes and dipping products
- Traceable regional seed sourcing and origin-certified premium products

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