A YEAR OF INNOVATION IN SOUP, SALAD & SANDWICHES, 2023

Plant-based claims are rising in Asia and North America, while innovation in frozen formats is surging as consumers seek out convenient long-life options.
Report Content

• What we have seen
• Our pick of the most innovative launches in this review
• Other innovative launches

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: wet soup launches in glass jars become more prolific
• Consumers want to reduce plastic waste
  - Graph 1: wet soup launches, by top five pack types, 2018-19 vs 2022-23
• Glass bottles and jars are arriving in wet soup launches

Europe: animal welfare claims grow in soup, salad and sandwich launches
• Consumers express growing interest in ethically sourced meat
  - Graph 2: soup, salad and sandwich launches featuring a meat or fish ingredient*, by share of ethical animal claim, 2018-23
• New launches highlight the ethical sourcing of animal ingredients
• Brand renovation/innovation: Heinz and John West launch plant-based options

The Middle East & Africa (MEA)
• Soup and sandwich brands highlight natural, premium and additive-free recipes

ASIA PACIFIC (APAC)

Asia: convenience is a significant feature of soup innovation
• Frozen soups appeal as a convenient meal option
  - Graph 3: wet soup launches, by share of storage type, 2018-23
• Frozen wet soups appeal to a diversity of consumer needs and tastes
• Brand renovation/innovation: Food Art launches no-cook better-for-you soups

Asia: sandwich/wrap brands look to tempt consumers with plant-based options
• Plant-based claims remain niche in sandwich innovation, but are growing
  - Graph 4: sandwich/wrap launches, by share of plant-based claim, 2018-23
• Plant-based proteins take centre stage in these sandwich launches

Australia & New Zealand
• Soup brands offer consumers better-for-you and functional benefits
THE AMERICAS

North America: brands are tapping into consumer demand for meat flavours, even for plant-based options
• Consumers are looking to reduce their meat consumption, but don’t want to compromise on flavour
  - Graph 5: soup, salad and sandwich launches, by share of plant-based claim, 2018-23
• Soup, salad and sandwich brands offer plant-based options with meat-, fish- and dairy-like flavours

North America: convenience is a significant driver of soup, salad and sandwich innovation
• Consumers want fuss-free and quick-to-prepare meal options
  - Graph 6: wet soup and sandwich launches, by share of storage, 2018-23
• Frozen and shelf-stable soup and sandwich options highlight preparation speed and convenience
• Brand renovation and innovation: Chubby Snack launches better-for-you nut butter and jam sandwiches

Latin America: soup, salad and sandwich brands are tapping into the popularity of meat
  - Graph 7: soup, salad and sandwich launches, by share of fauna flavour component group, 2018-23
• Meat flavours dominate sandwich launches in Latin America