

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.



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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
- Wet soup launches in jars record a jump in activity
 - 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
- The share of animal welfare claims is increasing in products containing meat and/or fish
 - 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
- Frozen wet soups are eating into the dominance of shelf-stable formats
 - 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
- Plant-based claims grow in sandwich and wrap launches
 - Graph 4: sandwich/wrap launches, by share of plant-based claim, 2018-23

A year of innovation in soup, salad & sandwiches, 2023

- 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
- Plant-based claims grow in soup, salad and sandwiches
 - 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
- Long-life wet soup and sandwiches are seeing increased launch activity
 - 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

- Meat flavours are particularly popular in Latin America
 - Graph 7: soup, salad and sandwich launches, by share of fauna flavour component group, 2018-23
- Meat flavours dominate sandwich launches in Latin America

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