

A YEAR OF INNOVATION IN TABLE SAUCES, OILS & SEASONINGS, 2022

Ethnic-inspired sauces with exotic chilli content are gaining profile as plant-based and clean-label recipes grow in prominence.



Amrin Walji, Senior Innovation Analyst



Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Other innovative launches
- Innovation opportunities in...

EUROPE, MIDDLE EAST & AFRICA (EMEA)

Europe: exotic street food flavours capture consumer interest

- Consumers are keen to try exotic street food flavours as a form of escapism
- Ketchup and mustard dominate table sauce flavours, while exotic flavours remain niche
 - Graph 1: table sauce launches, by share of flavour component, 2020-22
- Internationally inspired table sauces aim to deliver a transportive quality to meals
- Brand renovation/innovation: Nando's brings restaurant flavours home to consumers

Europe: brands respond to consumer interest in plant-based options

- Consumers are looking to reduce their meat intake
- Vegan offerings account for a bigger share of NPD activity
 - Graph 2: launches of table sauces, oils & seasonings, by share of vegan, vegetarian and plant-based claims, 2018-22
- Vegan condiments promise zero compromise on taste, quality and ethics

The Middle East & Africa (MEA)

- Middle Eastern and African brands celebrate local flavours

ASIA PACIFIC (APAC)

Asia: consumers' evolving dietary needs are shaping innovation

- Table sauce brands must acknowledge the diversity of consumers' dietary needs
- 'Suitable for' claims stagnate in table sauces
 - Graph 3: table sauce launches, by share of select 'suitable for' claims, 2018-22
- Some brands are targeting specific diets with gluten-free, vegan and halal options

Asia: cooking oils flag up wellness benefits

- Consumers are keen to buy cooking oils with added nutritional benefits
- Cardiovascular health tops claims in functional cooking oils
 - Graph 4: launches of functional cooking oils, by share of top functional claims, 2020-22
- Cooking oil brands are flagging up the functional benefits of their products

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Australia & New Zealand

- Seasoning brands remove additives and preservatives from their recipes
- Brand renovation/innovation: McCormick introduces Air Fryer Recipe Bases in Australia

THE AMERICAS

North America: table sauce brands are addressing ingredient and additive concerns

- Table sauces with long ingredient lists have a dubious health image
- No additives and preservatives claims record a sharp increase among table sauce launches in North America
 - Graph 5: table sauce launches, by share of select natural claims, 2018-22
- Table sauce brands celebrate different aspects of clean-label recipes

North America: innovation in hot and spicy sauces

- Foodie Millennials enjoy the diverse and multicultural world of hot sauces
- Hot and spicy flavours are niche among launches of condiments in North America
 - Graph 6: launches of table sauces, mayonnaise, dressings & vinegar, oils and other sauces & seasonings, by share of select flavours, 2018-22
- Brands explore different types of peppers to deliver heat

Latin America

- Localism inspires table sauce innovation in Latin America
 - Graph 7: table sauce launches, by share of import status, 2020-22
- Localism inspires table sauce innovation in Latin America
- Brands celebrate local flavours, ingredients and culture

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