

# COOKING SAUCES – GERMANY – 2019

Elevating convenience and increasing appeal to scratch cooks is needed. Ethnic sauces, authenticity, naturalness and healthiness all warrant attention.



Heidi Lanschützer, Deputy  
Research Director,  
Germany



# Report Content

## EXECUTIVE SUMMARY

- Mintel's perspective

### Market context

- Competition from sauces made from scratch holds back full potential
- Convenience a big driver of usage and product choice
- Convenience a big driver of usage and product choice
- Strong consumer interest in healthy sauces and natural ingredients

### Mintel predicts

- Market in a good position to grow sales given the demand for convenient meal options
- Innovation focused on cooking short cuts, naturalness and health will keep growth going
- Higher weekly usage among young adults is a platform to build on
  - Graph 1: weekly usage of different types of cooking sauces, by age, September 2019

### What consumers want, and why

- Consumers want: convenience
- Consumers want: convenience
- Consumers want: naturalness and healthy sauces
  - Graph 2: interest in different product attributes for cooking sauces, September 2019
- Consumers want: authenticity and great taste
  - Graph 3: attitudes towards flavours in cooking sauces, September 2019
- Consumers want: more ethnic sauces
  - Graph 4: behaviours and preferences relating to ethnic cooking sauces, September 2019

### Opportunities

- Use naturalness and healthiness to increase usage
- Elevate authenticity in cooking sauces
- Elevate authenticity in cooking sauces
- Tap interest in more ethnic sauces

### The competitive landscape

- Brands dominate value sales, but private label bigger by volume
- Germany: leading cooking sauce manufacturers by value, retail, 2017-18
  - Graph 5: leading manufacturers of cooking sauces, % share by value, 2017-18
- Price not the only means for winning over consumers



- Quick download resources

### MARKET DRIVERS

- Focus on processed foods to tackle obesity
- Focus on processed foods to tackle obesity
- Number of health factors important to those looking for healthy foods
- Low sugar content biggest health factor
  - Graph 6: most important factors when looking for healthy foods, by age, Q4 2018
- Ingredients lists and calories checked by a large minority
  - Graph 7: healthy eating habits, by age, Q3 2018
- Shortcuts and transparency on ingredients important
- Strong demand for easy and quick to prepare weekday meals
  - Graph 8: cooking habits, by age, Q4 2018
- Cooking sauces well placed to grow through exploring flavours from other countries
- Tradition and heritage also important
- Strong interest in a variety of flavours
  - Graph 9: interest in exploring ingredients/flavours, by age, Q1 2019
- Sales of pasta continue to show growth
- Sales of pasta continue to show growth
- Rising real earnings growth should keep Germans buying
  - Graph 10: growth in gross earnings and consumer prices, Q1 2014-Q1 2019
- Decline projected in core younger user groups

### WHAT CONSUMERS WANT, AND WHY

#### Types of cooking sauces used

- Shop-bought and home-made sauces both widely used
- Variety of different types of product used
  - Graph 11: types of cooking/pasta sauces used in the last three months, September 2019
- Infrequent usage for all types of shop-bought sauces
  - Graph 12: frequency of using cooking/pasta sauces in the last three months, September 2019
- Younger people are the core users of cooking sauces
  - Graph 13: usage of different types of cooking sauces at least once a week, by age, September 2019

#### Cooking sauces' buying factors

- Low price and brand the biggest factors influencing choice
  - Graph 14: most important factors when buying cooking/pasta sauces, September 2019
- Everyday low prices more important than offers

- Low price most important to younger buyers
  - Graph 15: importance of low price, favourite brand and promotions when buying cooking/pasta sauces, by age and net monthly income, September 2019
- Saving time an important driver of choice
- Focusing on healthiness and authenticity are two ways to increase usage
- Mintel Trend: The Real Thing

### Cooking sauces behaviours and preferences

- Strong interest in a greater variety of ethnic sauces
- Opportunity to grow ethnic sauces in Germany
- Maggi Food Travel puts the focus on regional recipes
- Ethnic cooking sauces have widespread appeal
  - Graph 16: behaviours and preferences in relation to ethnic cuisines, by age, September 2019
- Street food theme another angle for innovation
- Street food theme another angle for innovation
- Lidl launches My Street Food range
- Strong interest in more healthy cooking/pasta sauces
  - Graph 17: importance of health and nutrition in cooking/pasta sauces, September 2019
- Mintel Trend: Total Wellbeing
- Cooking/pasta sauces cater to different convenience needs
  - Graph 18: attitudes to different aspects of convenience in cooking/pasta sauces, September 2019
- Backlash against plastic packaging
- Backlash against plastic packaging

### Interest in different product attributes

- Focus on naturalness needed in cooking/pasta sauces
  - Graph 19: interest in different product attributes in cooking/pasta sauces, September 2019
- German sauces convey naturalness through being organic
- Mintel Trend: Bannedwagon
- Significant interest in more vegetables in cooking/pasta sauces
  - Graph 20: interest in more cooking/pasta sauces containing more vegetables, September 2019
- Small proportion of launches go beyond tomato, onion and garlic
  - Graph 21: top vegetable ingredients in new launches of cooking/pasta sauces, Jan-Nov 2019
- Recipe suggestions for plant-based meals are also of interest
  - Graph 22: interest in more cooking/pasta sauces that work well with just vegetable or meat substitutes, September 2019
- Marketing as marinade, dip or cooking sauce

### Attitudes towards cooking/pasta sauces

- Consumers want to recreate the restaurant experience

- Graph 23: attitudes towards flavours in cooking/pasta sauces, September 2019
- Restaurant-style and homemade angles
- Referencing chefs is rare in cooking sauce launches
- Premium private label has a slight edge on authenticity
  - Graph 24: attitudes towards premium private label ranges in cooking/pasta sauces, September 2019
- Premium private label has slight edge on authenticity
- Aldi elevates premium with 'gourmet' ranges
- Give people the feeling they are cooking from scratch
  - Graph 25: attitudes towards use of cooking sauces when cooking from scratch, September 2019

### LAUNCH ACTIVITY AND INNOVATION

- No added sugar and less fat makes a healthier sauce
  - Graph 26: new launches in cooking and pasta sauces making no added sugar and L/N/R fat claims, 2017-19
- Room for more products to make reduced fat and no added sugar claims
- Organic and natural claims are prominent in cooking/pasta sauces
  - Graph 27: new launches of cooking/pasta sauces making natural claims, 2015-19
- Brands need to go beyond organic in highlighting naturalness
- Sauces with lots of vegetables add differentiation
- Products offering meat-free meal solutions
- Knorr Veggie range raises the bar on sustainability
- More flavour variety in pesto from Saclà Fusion range
- More unusual pesto varieties
- Rare example of a Fairtrade launch from Fairtrade Original
- Growth in vegan and plant-based claims
- Only a small focus on pushing the convenience of cooking sauces
  - Graph 28: convenience claims in cooking and pasta sauces, 2015-19
- Specifying the time to prepare a meal with sauces is rare

### MARKET SHARE

- Brands take two thirds of euros spent on cooking sauces in retail in Germany

#### Retail market share of cooking sauces, by value, 2016-18

- Barilla leads with a 32% share, reflecting strength in pasta sauces and pesto

#### Retail market share of cooking sauces, by volume, 2016-18

- Private label accounts for more than half of volume sales

### MARKET SEGMENTATION, SIZE AND FORECAST

- Strong demand for convenience drives sales growth
- Growth in sales forecast to continue
- Importance attached to convenience will drive volume sales growth
- Sales forecast to continue on an upward path
- All segments of cooking sauces growing
- Tomato-based sauces dominate sales

### APPENDIX

#### Appendix – products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Consumer research methodology

#### Appendix – launch activity and innovation

- Launch activity by top claims
- Launch activity by launch type
- Launch activity by branded vs. private label
- Launch activity by primary packaging material

#### Appendix – market size and forecast

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – volume
- Market size and forecast – value – best- and worst-case
- Market size and forecast – volume – best- and worst-case

# About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

## What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

## How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

## BUY THIS REPORT NOW

**€2600.00 | £2195.00 | \$2995.00\***

[store.mintel.com](https://store.mintel.com) | [store@mintel.com](mailto:store@mintel.com)

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**

**Disclaimer**

This is marketing intelligence published by Mintel.  
The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([see Research Methodology Europe for more information](#)).

**Terms and Conditions of use**

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

**Published by Mintel Group Ltd**

[www.mintel.com](http://www.mintel.com)  
email: [store@mintel.com](mailto:store@mintel.com)

**Help desk**

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850