

COOKING SAUCES – GERMANY – 2023

Whilst more healthy, clean label and sustainable sauces enter the market, taste and value remain key purchase differentiators in an era of higher inflation.



Harry Meehan, Analyst



Cooking Sauces - Germany - 2023

This report looks at the following areas:

- Market drivers for cooking and pasta sauces, including the impact of inflation, overweight/obesity levels and the shift toward sustainable nutrition
- Usage of cooking and pasta sauces, with 84% of Germans having used a pre-made sauce in the past three months
- Frequency of usage of cooking and pasta sauces, with 16-24s the most frequent users of all cooking and pasta sauces
- Purchase factors for cooking and pasta sauces, with clean label options helping bridge the gap between pre-made and preferred scratch-made sauces
- Attributes associated with tomato-based cooking and pasta sauces, with users seeking healthy and convenient sauces
- Attitudes and behaviours related to cooking and pasta sauces, with quick lunch options particularly popular amongst 16-24s
- Recent product launch activity and innovations, including flavour and ingredient analysis



Whilst more healthy, clean label and sustainable sauces enter the market, taste and value remain key purchase differentiators in an era of higher inflation.

Overview

84% of Germans use cooking sauces; scratch-made sauces are especially popular, with 82% of Germans using them. Whilst **scratch cooking poses a direct threat to the long-term success of pre-made sauces**, there remains room for growth for pre-made sauces. 51% of

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cooking sauce users aged 16–24 say their sauce usage would increase if less established cuisine options were offered.

The rising cost of living is reducing how often Germans eat out, and the increasing popularity of working from home is creating opportunities for pre-made sauces to be used in the home. In addition, **private label cooking sauces are enjoying more momentum during the income squeeze**, offering consumers lower prices yet a similar taste experience to branded products. However, branded cooking sauces can capitalise on the 'lipstick effect' to capture value sales and premiumise with ingredients/flavours whilst elevating their image with strong ethical and environmental credentials.

Cooking sauces must play to their strengths and address the lack of **communication around the main attraction of time-saving convenience**. However, reliance on convenience only will not provide long-term success as consumer desire for **improvement of health and sustainability credentials** grows.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for cooking sauces

Market context

- More time spent in the home creates more home-cooking opportunities
- More time spent in the home creates more home-cooking opportunities
- The rising cost of living shifts the attention to private label sauces
- The rising cost of living shifts the attention to private label sauces
- Holistic health concerns drive desire for healthier sauces
 - Graph 1: attributes associated with homemade tomato-based cooking and pasta sauces, by selected associated attributes, 2022

Mintel predicts

- Strong repertoire for 16-34s could spell long-term success for sauces
 - Graph 2: repertoire of types of cooking and pasta sauces used in the past three months, 2022
- Expect an increased interest in nutritional transparency in sauces
 - Graph 3: cooking and pasta sauce launches and food launches, by % using the Nutri-Score, 2020-22
- Anticipate greater focus on sustainable nutrition

Opportunities

- Strive towards a clean label to fend off threat from pure scratch cooking
- Market sauces as 'plant-based' to generate widest appeal
- Deliver value with versatile sauces and cooking methods
- Don't lose sight of taste and embrace taste-bud tourism
- Quick download resources

MARKET DRIVERS

The German economy

- The cost-of-living crisis is holding back the post-COVID-19 recovery
 - Graph 4: key economic data, in real terms, 2019-24
- Inflation continues to be the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- Inflationary pressures and the income squeeze force a rethink in eating habits

- Graph 5: going out for an expensive meal, 2022
- Energy crisis-induced price hikes provide momentum for private label cooking sauces
- Energy crisis-induced price hikes provide momentum for private label cooking sauces
- Energy crisis-induced price hikes provide momentum for private label cooking sauces
- Normalisation of remote working will mean more meals prepared from home
 - Graph 6: activities carried out during lunch/the main break by workers on a typical working day, 2022
- Obesity levels shine the light on overly processed pre-made sauces
 - Graph 7: overweight and obesity rate, by BMI and age group, 2014 vs 2019
- Growing focus on holistic health drives demand for natural and healthy sauces
 - Graph 8: attributes associated with homemade tomato-based cooking and pasta sauces, by selected associated attributes, 2022
- Sustainability is growing in importance, yet value and taste drive purchase
 - Graph 9: attributes associated with tomato-based cooking and pasta sauces, by selected associated attribute, 2022

WHAT CONSUMERS WANT AND WHY

Usage of cooking and pasta sauces

- Demand remains for cooking sauces to thrive by offering shortcuts for the consumer
- Demand remains for cooking sauces to thrive by offering shortcuts for the consumer
- 16-34s have the biggest repertoire of sauces used
 - Graph 10: repertoire of types of cooking and pasta sauces used in past three months, by age group, 2022
- Dry sauce/seasoning mixes help to enhance flavour quickly
- Make world cuisine paste concepts more accessible
- Attract parents of under-18s who prefer scratch cooking with customisable, natural sauces
- Attract parents of under-18s who prefer scratch cooking with customisable, natural sauces

Frequency of usage of cooking and pasta sauces

- Usage of all types of shop-bought sauces remains infrequent
 - Graph 11: frequency of cooking and pasta sauce usage in last three months, 2022
- Build on cooking sauces' strong user base with flavour innovation
 - Graph 12: cooking and pasta sauces launches, by flavour (incl. blend), 2022
- Encourage 16-24s to continue sauce usage with tasty umami plant-based options
- Market vegan sauces as 'plant-based' to generate widest appeal
- Emphasise financial and culinary value with pastes amidst the income squeeze
- Deliver value with energy-efficient and slow-cooked, ready-to-use sauces

Purchase factors for cooking and pasta sauces

- Embrace naturalness as a priority
 - Graph 13: most important purchase factors for cooking and pasta sauces, 2022

- Fuse convenience and naturalness in cooking sauces
- Address unhealthy perceptions with a clean label

Attributes associated with tomato-based cooking and pasta sauces

- Convenience is king for pre-made tomato-based cooking sauces
 - Graph 14: attributes associated with tomato-based chilled cooking sauces, 2022
 - Graph 15: attributes associated with tomato-based non-chilled cooking sauces, 2022
- Unhealthy pre-made sauces – scratch that says the health conscious-German consumer
- Unhealthy pre-made sauces – scratch that says the health conscious-German consumer
- Premade sauces can aim to narrow the perception gap with homemade sauces
- Reduce salt/sugar in line with the BMEL strategy and engage consumers with play
- Provide the base for a sustainable nutrition revolution to endear &environmentally conscious consumers to your brand

Attitudes related to cooking sauces

- Brands can make a quick buck by facilitating a quick lunch
 - Graph 16: attitudes towards cooking sauces, 2022
- All roads lead to (cooking in the) home, creating &more opportunities for quick lunch sauces
 - Graph 17: frequency of eating lunch at home in the last three months, 2022^
- A warning sign for cooking sauces as ready meals are on the rise
- Embrace social media to capture 16-34s' attention with quick meals
- Visualise how your products can be used for flexible, scratch cooking

Behaviours related to cooking sauces

- Private labels are gaining traction but brands can offer value other than price to retain customers
 - Graph 18: behaviours related to cooking and pasta sauces, 2022
- Communicate sauce's potential to provide sensory escapism
- Communicate sauce's potential to provide sensory escapism
- Offer taste-bud tourism to consumers eager for exploration
- Brands can counter the private label threat with better value-for-money bulk buy options
- Strong communication is needed to justify premium prices

LAUNCH ACTIVITY AND INNOVATION

- Growth in new packaging reflects increase in product renovation
 - Graph 19: cooking and pasta sauce launches, by launch type, 2020-22
- Private label launches rise amid the income squeeze
 - Graph 20: cooking and pasta sauce launches, by ultimate company, 2021-22
 - Graph 21: cooking and pasta sauce launches, by branded vs private label, 2018-22
- REWE Group's premiumisation challenges brands on quality...

- ...but also with an eye on the future
- Lidl explores world cuisines amidst limited offering in sauces
- Flavour profiles in cooking/pasta sauces are mainly Italian
 - Graph 22: cooking and pasta sauce launches, by flavour (incl. blend) unordered, 2020-22
- No added sugar and less fat makes a healthier sauce
 - Graph 23: cooking and pasta sauce launches, by selected claims, 2020-22
- Smart launches must clearly communicate health benefits without compromising on taste
- Smart launches must clearly communicate health benefits without compromising on taste
- Room for more L/N/R fat products with offerings currently limited
- Cooking and pasta sauces slightly ahead of the wider market trend for Nutri-Score inclusion
- Cooking and pasta sauces slightly ahead of the wider market trend for Nutri-Score inclusion
- More private label cooking and pasta sauces embrace the Nutri-Score compared to brands
 - Graph 24: cooking and pasta sauce Nutri-Score inclusion, by branded vs private label, 2020-22
- REWE and Nestlé lead the way with Nutri-Score transparency
- Address the vegan/plant-based post-hype lull by making such sauces more accessible
 - Graph 25: cooking and pasta sauce launches, by vegan/plant-based claims, 2020-22
- Cooking sauces tapping into the desire for plant-based
- With organic suggesting natural, non-organic brands can compete with 'all-natural product' claims
 - Graph 26: cooking and pasta sauce launches, by selected natural claims, 2020-22
- Make all-natural and organic claims more obvious to the consumer
- Sustainability, an increasing feature in cooking and pasta sauces
 - Graph 27: cooking and pasta sauce launches, by selected sustainability claims, 2020-22
- Recyclable (re)packaging an increasingly frequent launch type beyond other sustainability claims
- Ppura set a high standard for sustainability
- Convenience of cooking sauces not highlighted enough
 - Graph 28: cooking and pasta sauce launches, by selected convenience claims, 2020-22
- Sauces which state time savings will be a hit for time-strapped consumers
- Just Spices sauce in a glass jar answers the call for natural, time-saving authentic sauces

Advertising and marketing activity

- Knorr Gönn dir Gemüse encourages reduced meat consumption
- Barilla's passive cooking could increase demand for pasta, thus creating opportunity for pasta sauces
- Barilla's 'Second Life Pasta'
- Utilise YouTube Shorts to visualise speed of the cooking process
- Ppura champion how sauces aren't just for slapdash meal prep

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- Correspondence Analysis
- A note on language

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