

# COOKING SAUCES, PASTA SAUCES AND MARINADES – US – 2023

Consumers depend on the convenience sauces and marinades bring to the table; stressing ease-of-use is vital in affirming value for cooking fatigued consumers.



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# Cooking Sauces, Pasta Sauces And Marinades - US - 2023

## This report looks at the following areas:

- The short-, medium- and long-term affects of inflation on cooking sauces, pasta sauces and marinades and consumer behavior
- Reported usage of cooking sauces, pasta sauces and marinades
- Usage frequency of cooking sauces, pasta sauces and marinades
- Pasta sauce, cooking sauce and marinade purchase factors
- Interest in usage occasions for sauce and marinade formats
- Attitudes towards cooking sauces, pasta sauces and marinades
- Innovation of interest in cooking sauces, pasta sauces and marinades
- Trends in launch activity for cooking sauces, pasta sauces and marinades and opportunities for further innovation



Consumers depend on the convenience sauces and marinades bring to the table; stressing ease-of-use is vital in affirming value for cooking fatigued consumers.

## Overview

Packaged cooking sauces, pasta sauces and marinades are a staple in US households with a nearly 90% reported usage rate. Consumers continue to find value in their time-saving benefits for putting food on the table quickly and efficiently. The sauce category is highly benefited by a combination of high foodservice prices and work-from-home setups that make cooking at home necessitated. However as cooking is on the rise, cooking fatigue simultaneously grows. Consumers seek easy meal prep solutions in which sauces can provide.

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Limited perceptions for sauce use cases beyond dinner pose a challenge in expanding the category. Similarly, purchase drivers for all segments largely revolve around price and trusted brand, also stunting opportunities for innovation and development. Brands that provide value to consumers by highlighting new application ideas for a variety of easy, low-cost meals, can be more meaningfully engaging than novelty.

As newcomers to cooking, Gen Z consumers are the least engaged in the category, yet future success depends on them. Emphasizing ease-of-use, flavor exploration and nutrition benefits of sauces has potential to engage with these cooking novices and establish avenues for subsequent growth.

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# Report Content



## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

## CONSUMER INSIGHTS

### The cooking sauces, pasta sauces and marinades consumer: fast facts

#### Types of cooking sauces, pasta sauces and marinades used

- Craving for convenience maintains demand of sauces, yet opportunities exist for expansion
- Pasta sauce and barbeque sauce take the lead in sauce usage
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- Sauces benefit from a rise in cooking and a demand for value
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  - Graph 11: factors of importance when purchasing store bought pasta sauces, cooking sauces and marinades, 2023
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  - Graph 14: factors of importance when purchasing store bought marinades, by financial situation, 2023

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- Provide value to cooking fatigued consumers
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  - Graph 21: attitudes towards cooking sauce, pasta sauce and marinades, 2023
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  - Graph 23: "any agree" attitudes towards cooking sauce, pasta sauce and marinades, by financial situation, 2023

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### COMPETITIVE STRATEGIES

#### Launch activity and innovation

- Concentrates "up the flavor" with only a small quantity required
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- Suitable sauces for every diet and lifestyle are on the rise
  - Graph 29: percent of cooking & pasta sauce launches by claim category, 2018-23
- New packaging and formats shake up the category
- Novel packaging creates space-saving and convenience benefits
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  - Graph 31: [no title]
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  - Graph 33: percent of cooking and pasta sauce launches with the term "authentic," 2018-23
- Global sauces make flavor exploration uncomplicated, but opinions over their value are mixed
  - Graph 34: [no title]
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  - Graph 36: pasta and cooking sauce launches by select keywords, % of launches, 2018-23
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#### Marketing and advertising

- Brands emphasize flexibility in response to consumers' appetite for personalization
- From hors d'oeuvres to dessert: brands expand sauce use beyond dinner
- As food prices rise, versatility becomes more favorable

#### Opportunities

- Provide quick and dirty full meal solutions for cooking-fatigued consumers

- Stay on top of social media trends to engage and inspire
- Get thrifty: revive leftovers to stretch budgets and reduce waste
- Restaurant-quality sauces bring fan favorites home

## THE MARKET

### Market Context

#### Market drivers

- High food prices squeeze grocery budgets
- Flexible work schedules and fickle food prices result in greater at-home food consumption
- Gen Zs enter the kitchen, yet lack culinary know-how
  - Graph 38: consumers reporting cooking more than last year, by generation, 2022
  - Graph 39: reported "basic" cooking skill level, by generation, 2022
- Consumers seek straightforward health solutions in cooking sauces, pasta sauces and marinades
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#### Market size and forecast

- Retail sales and forecast of cooking sauces, pasta sauces and marinades
- Retail sales and forecast of cooking sauces, pasta sauces and marinades, at current prices
- Retail sales and forecast of cooking sauces, pasta sauces and marinades, at inflation-adjusted prices
- Demand for convenience pushes the cooking sauce, pasta sauce and marinade category forward
- Market size and forecast

#### Market segmentation

- Retail sales of cooking sauces, pasta sauces and marinades, by segment
  - Graph 41: [no title]
- Retail sales of cooking sauces, pasta sauces and marinades, by segment
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- Sales of cooking sauces, pasta sauces and marinades, by company
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- Sovos Brands bring restaurant-quality pasta sauce home
- Sales of barbeque sauce, by company

- Top barbeque sauces lose share to newcomers
- Market share of tomato bases, other sauces and gravy
  - Graph 45: market share of other sauces and gravy, by leading companies and brands, rolling 2023
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- Sales of tomato bases, by company
- Private label takes the lead in tomato-based sauces; but space for premium endures
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## APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

### The market

- Retail sales and forecast of cooking sauce, pasta sauce and marinades, at current prices
- Retail sales and forecast of cooking sauce, pasta sauce and marinades, at inflation-adjusted prices
- Retail sales of cooking sauces, pasta sauces and marinades, by segment
- Average annual household spending on cooking sauces, pasta sauces and marinades
- Total US retail sales of cooking sauces, pasta sauces and marinades, by segment, at current prices
- Total US retail sales and forecast of pasta and pizza sauce, at current prices
- Total US retail sales and forecast of pasta and pizza sauce, at inflation-adjusted prices
- Value, average price and volume of multi-outlet pasta and pizza sauce sales
- Total US retail sales and forecast of barbeque sauce, at current prices
- Total US retail sales and forecast of barbeque sauce, at inflation-adjusted prices
- Value, average price and volume of multi-outlet barbeque sauce sales
- Total US retail sales and forecast of tomato bases, at current prices
- Total US retail sales and forecast of tomato bases, at inflation-adjusted prices
- Value, average price and volume of multi-outlet tomato bases sales
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- Total US retail sales and forecast of other sauces and gravy, at inflation-adjusted prices
- Value, average price and volume of multi-outlet other sauces and gravy sales
- Sales of pasta sauce, cooking sauce and marinades, by company
- Sales of pasta and pizza sauce, by company
- Sales of barbeque sauce, by company



- Sales of tomato bases, by company

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