

COOKING SAUCES & PASTA SAUCES – UK – 2024

Soaring inflation has seen double-digit value growth in the market, amid falling volumes. Targeting time-poor and health conscious consumers will gain importance.



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This report looks at the following areas:

- The impact of the income squeeze on the market and the outlook for the next five years
- Key new product development trends in the category
- Usage of cooking and pasta sauces by type and occasion
- Factors associated with good value in cooking and pasta sauces, including better-for-you attributes
- Behaviours related to cooking and pasta sauces, including perceptions of these as processed
- Concepts of interest in cooking and pasta sauces, including one-pan solutions



Soaring inflation has seen double-digit value growth in the market, amid falling volumes. Targeting time-poor and health conscious consumers will gain importance.

Overview

The category experienced double-digit value growth in 2023, however, this is largely a result of soaring inflation rather than a strong underlying performance, with volume sales falling. While some people will have looked to cooking sauce as a cheaper alternative to foodservice or ready meals, the appeal of scratch-cooking as a means to save money has seen some consumers turn from the category.

Half of category users/buyers already see cooking/pasta sauces as ultra-processed. At current, this view does not appear to be a put-off. Those holding this sentiment use all the sauce types more often than those who disagree, perhaps suggesting that familiarity with the

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category drives stronger views about it. However, should the public spotlight on ultra-processed foods intensify, this could present headwinds for the category moving forward.

Looking forward, consumer interest in health is expected to strengthen once real income growth regains momentum. This focus on health translates into consumers' priorities in the cooking/pasta sauce category. Half of users/buyers ranked a better-for-you factor among the top three they most associate with good value. Exploring better-for-you aspects will become increasingly important for both brands and own-label to maintain interest.

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Report Content



EXECUTIVE SUMMARY

Opportunities for the cooking and pasta sauce market

- Plant ingredients have potential to appeal
- A wide variety of plant ingredients can signal value
- Help shoppers who are in a rush
- Engage those in a rush
- Social media holds influence in the category
- Social media has a role to play in the category

Market dynamics and outlook

- Market predictions
- Value sales to slow in 2024-25, regaining momentum later
- Ambient wet sauces grow value sales by a fifth in 2023
 - Graph 1: retail value sales of cooking/pasta sauces, by segment, 2021-23
- Dolmio remains top brand, strong performance from own-label
 - Graph 2: retail sales of leading brands in cooking/pasta sauces, by value, 2020/21-22/23
- Strong interest in healthy eating, UPF concerns could pose headwinds

What consumers want and why

- Usage of cooking/pasta sauces remains unchanged
 - Graph 3: usage of cooking and pasta sauces, by type, 2021-23
- Weekly usage of ambient cooking/pasta sauces declines
 - Graph 4: frequency of usage of cooking sauces, by type, 2023
- Everyday occasions lead for cooking/pasta sauces
 - Graph 5: occasions for using cooking/pasta sauces, 2023
- Better-for-you factors most associated with good value
 - Graph 6: factors most associated with good value in cooking/pasta sauces, 2023
- Many see the category as ultra-processed
 - Graph 7: behaviours related to cooking/pasta sauces, 2023
- One in three interested in low salt/sugar claims
 - Graph 8: concepts of interest in cooking/pasta sauces, 2023
- Interest in one-pot formats

Innovation and marketing

- Dolmio undertakes brand revamp, Heinz collaborates with Absolut

- Brands and own-label target home cooks, plant-based claims are on the rise
- Brands aim to deliver a restaurant experience at home
- Premier Foods focuses on value in TV ads, Dolmio and Heinz encourage challenging the norm

MARKET DYNAMICS

Market size

- High inflation drives value growth in 2023
- Retail value sales of cooking and pasta sauces
 - Graph 9: retail value sales of cooking and pasta sauces, 2019-23

Market forecast

- Value sales expected to grow
- Easing of income squeeze will bring both opportunities and threats
- Learnings from the last income squeeze

Market segmentation

- Ambient wet sauces grow value sales by a fifth in 2023
- Retail value sales of cooking and pasta sauces
 - Graph 10: retail value sales of cooking/pasta sauces, by segment, 2021-23
- Italian sauces extend their lead, Indian and Oriental hold their ground
 - Graph 11: retail value sales of ambient wet and dry cooking and pasta sauces, by cuisine, 2021-23

Market share

- Ambient segment remains fragmented
 - Graph 12: retail sales of leading brands in cooking/pasta sauces, by value, 2020/21-2022/23
- Dolmio remains top brand, strong performance from own-label
- Heinz and The Spice Tailor perform well

Macro-economic factors

- Economic output has stagnated since the cost of living crisis began
 - Graph 13: GDP, 2021-23
- Inflation is still the key factor affecting consumers' finances
 - Graph 14: CPI inflation rate, 2021-23
- Interest rates expected to fall in 2024, but borrowing pressures will remain
- Food and drink prices still top the list of consumer concerns
 - Graph 15: "Have you been affected by any of these issues over the last two months? Please select all that apply.", 2023
- Sauces and condiments see prices rise ahead of all food
 - Graph 16: all food and sauces/condiments CPI, annual change, 2019-23
- Consumer sentiment: the recovery is continuing...

- Graph 17: the financial wellbeing index, 2016-23
- ...and people feel more confident about their financial prospects
- Graph 18: the financial confidence index, 2016-23

Social, environmental and legal factors

- Government measures on HFSS slow to roll out
- Cooking and pasta sauces fall outside HFSS
- Strong consumer interest in healthy eating
 - Graph 19: how often people try to eat healthily, 2018-22
- Media spotlight on ultra-processed foods
- Ultra-processed concerns could pose headwinds
- Salt reduction remains on the agenda
- Population growth expected
 - Graph 20: trends in the age structure of the UK population, 2018-28
- Mixed effects from changes in size of different age groups
- Interest in sustainability expected to rebound

WHAT CONSUMERS WANT AND WHY

Usage of cooking/pasta sauces by type

- Usage of cooking/pasta sauces remains unchanged
 - Graph 21: usage of cooking and pasta sauces, by type, 2021-23
- One in four people eat ambient cooking/pasta sauces weekly
 - Graph 22: frequency of usage of cooking sauces, by type, 2023
- Non-chilled cooking sauces remain most popular, weekly usage down

Usage of cooking/pasta sauces by occasion

- Everyday occasions lead for cooking/pasta sauces
 - Graph 23: occasions for using cooking/pasta sauces, 2023
- Cooking/pasta sauces used most often used for everyday occasions...
- ...and with others, but nearly half eat them on their own
- Substantial lunchtime usage among under-35s

Factors associated with good value

- Pressing need to communicate value to consumers
- Better-for-you factors most associated with good value
 - Graph 24: factors most associated with good value in cooking/pasta sauces, 2023
- One in three see beneficial nutrients as a top good value factor
- Five-a-day claims seen as good value

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- Opportunity to drive added value image by highlighting wide range of plant ingredients
- Remind consumers of convenience of not having to buy multiple ingredients...
- ...including through on-pack messaging

Behaviours related to cooking sauces and pasta sauces

- Half of users and buyers see category as ultra-processed
 - Graph 25: behaviours related to cooking/pasta sauces, 2023
- Image as ultra-processed not a put-off
- Clean-label qualities remain relevant
- Open up manufacturing process
- High enjoyment in trying new cooking/pasta sauces
- Pressing need to engage those in a rush
 - Graph 26: users/buyers often in a rush when shopping for cooking/pasta sauces, by usage frequency, 2023
- End-of-aisle/more convenient locations can drive uptake
- Social media has substantial sway within the category
- Social media can inspire NPD and recipe ideas
- Heinz uses viral recipe to inspire NPD

Concepts of interest in cooking/pasta sauces

- Better-for you attributes hold wide appeal
 - Graph 27: concepts of interest in cooking/pasta sauces, 2023
- One in three interested in low salt/sugar claims
- Heinz and Walkers offer cues on how to communicate low/no claims
- Mutti taps into interest for better-for-you attributes
- One-pot solutions holds promise
- Highlight suitability for one-pan dishes on-pack
- Homepride's "no need to boil pasta" message offers cues
- Short cooking time is a pull

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- Brands retain majority share of launches in 2023
 - Graph 28: share of branded and private label launches, 2019-23
- Dolmio undertakes brand revamp and launches Intensify range
- Brands tap into at-home restaurant experience
- Loyd Grossman moves into stir-ins, Schwartz ties up with restaurants, Gymkhana restaurant secures retail listing
- Brands and own-label look to encourage home cooks
- Schwartz launches new range with TV chef Nadiya

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- ASDA launches scratch cooking range, Heinz introduces Culinary Tomatoes
- Curry Creations from Patak's
- Heinz launches limited edition variants with vodka...
- ...ketchup and Godfather
- ...and enters Mexican cuisine space with brand Las Chicas
- Sharwood's and Homepride extend better-for-you ranges
- H&B extends own-label food and drink offering
- Plant-based launches continue to gain share
 - Graph 29: vegetarian, vegan and plant-based claims in cooking and pasta sauce product launches, 2019-23
- Own-label and brands extend plant-based offerings
- New vegan ranges for Asda, Premier Foods extends Plantastic to sauces

Advertising and marketing activity

- Adspend jumps in 2023
 - Graph 30: total above-the-line, online display and direct mail advertising expenditure on cooking sauces, 2020-2023
- Premier Foods shines a focus on value
- Sharwood's highlights good value for money in TV ad
- Dolmio encourages cautious chefs to experiment in TV advert
- Dolmio encourages experimentation
- Heinz challenges stereotypes in TV ad
- Heinz "Not another Nonna, not another pasta sauce" advert
- Saclà £2 million marketing push

BRAND RESEARCH

- Key brand metrics
- Low current usage underpins a fragmented market
- Brand attitudes: low value connotations...
- ...and low image as worth paying more for
- Brand personality macro image: most brands enjoy accessible image
- Brand personality micro image: all brands lack associations with being natural
 - Graph 31: brand personality – micro image, 2023

APPENDIX

Supplementary data: launch activity and innovation

- UK: launches of cooking/pasta sauces, by launch type, 2019-23
 - Graph 32: launches cooking/pasta sauces, by launch type, 2019-23

Supplementary data: advertising and marketing activity

- UK: total above-the-line, online display and direct mail advertising on cooking sauces, by brand, 2020-23

Market segmentation

- UK: retail value sales of cooking/pasta sauces, by segment, 2021-23
- UK: retail value sales of ambient wet and dry cooking and pasta sauces, by cuisine, 2021-23

Market share

- UK: retail sales of leading brands in cooking/pasta sauces, by value, 2020/21-22/23
- UK: retail sales of leading manufacturers in cooking/pasta sauces, by value, 2020/21-22/-23

Market forecast data and methodology

- Market forecast
- Forecast methodology

Report scope and definitions

- Market definition
- Excluded from this report
- Abbreviations and terms

Methodology

- Consumer research methodology
- Nielsen Ad Intel coverage

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