

SAUCES, SEASONINGS AND SPREADS – CHINA – 2023

By leveraging sensory and emotional experiences and tailoring products to specific health and safety needs, brands can spice up performance in the evolving market.



Cara Liu, Senior Analyst,
China Insights



Sauces, Seasonings And Spreads - China - 2023

This report looks at the following areas:

This Report looks at the following areas:

- Market growth and competitive landscape of major sauces
- Marketing activities and new product trends of sauces, seasonings and spreads
- Consumers' usage of major and exotic sauces and spreads and compound seasoning packs
- Consumers' health and safety preferences for sauces and seasonings
- Consumers' considerations and behaviours towards purchasing sauces and seasonings
- Market potential of sauces, seasonings and spreads catering to emotional cravings, singlehood and ageing society.



By leveraging sensory and emotional experiences and tailoring products to specific health and safety needs, brands can spice up performance in the evolving market.

Overview

59% of consumers who cook Chinese cuisine a few times a week at home use compound seasoning packs at least once a week, compared to 54% of daily home cooks. Less experienced home chefs are growing as primary targets of recipe-style sauces and seasonings, and these single-dish-specific products can aid them with culinary convenience and confidence. This group is worth watching as condiment brands seek room for growth in compound sauces and seasonings.

BUY THIS REPORT NOW


€4400.00 | £3695.00 | \$4995.00*

store.mintel.com | 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



Recovering foodservices are squeezing out in-home condiment consumption, and consumers' changing diet habits to involve more semi-finished foods and delivery meals are also impacting the category. Brands are expected to invest more in healthier and more natural products and meet the functional demands of specific demographics like seniors.

Consumers are thirsty for real-world experiences in the post-pandemic era, with cuisines stimulating their senses and curiosity. Sauces, seasonings and spreads can amplify consumers' sensory experiences, leverage vivid flavours associated with emotions and improve storytelling about ingredient provenance.

BUY THIS REPORT NOW

€4400.00 | £3695.00 | \$4995.00*

store.mintel.com | store@intel.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

Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Definitions
- Overview

The market

- Compound sauces contribute the most to market growth
- Market factors

The company

- The industry giant is facing strong challengers in a more fragmented market
- Key trends in marketing activities
- New product trends
- Product examples illustrating these trends

The consumer

- Comprehensive online shopping channels play a bigger role in compound sauce and spread purchases
 - Graph 1: product penetration and purchase channel of major sauces and spreads, 2023
- Plant-based spreads are winning more consumers
 - Graph 2: purchasing exotic sauces and spreads, 2021 vs 2023
- Most compound seasoning packs continue to gain popularity
 - Graph 3: consumption frequency of compound seasoning packs, 2023
- Different age groups' varied requirements for safety and health attributes deserve special attention
 - Graph 4: health and safety attributes of sauces and seasonings, 2023
 - Graph 5: % point difference of health and safety attributes of sauces and seasonings (NET), segmented consumers by age of children in household vs average, 2023
- Production date and brands are dominant, and price is more considered
 - Graph 6: considering factors for purchasing sauces and seasoning products, 2023
- Boost culinary convenience and confidence
 - Graph 7: consumer behaviours towards purchasing sauces and seasoning products, 2023

Issues and insights

What we think

THE MARKET

Market size and forecast

- Compound sauces contribute the most to market growth
 - Graph 8: retail sales of sauces, seasonings and spreads, by segment, 2018-28

Market factors

- Staying in the kitchen less often and returning to restaurants
 - Graph 9: sectors that consumers have spent more money on compared to last months, 2022-23
 - Graph 10: year-on-year growth rate of total retail sales of consumer goods, by consumption pattern, 2022-23
- Recovering foodservices and ever-growing ready meals are squeezing out in-home condiment consumption
- Relatively low financial confidence may lead to intentional spending on in-home condiments
 - Graph 11: confidence about improving financial situation in the next three months, by select confidence level, 2020-23
- Cooking patterns and flavour preferences always matter
 - Graph 12: sauces, seasonings and spreads* launches, by segment, 2018-23

Market segmentation

- Soy sauce is expected to grow slower than before
- Vinegar companies are looking for derivative opportunities
- Oyster sauce is on a fast mainstreaming path
- Tomato sauce will develop from boom to diversification
- Asian flavours and vinaigrette will spice up the salad dressing market

THE COMPANY

Market share

- The industry giant is facing strong challengers in a more fragmented market

Marketing activities

- Energetically embrace young people's lifestyles
- Demonstrate product value to older consumers
- Assure consumers that the process is trustworthy

New product trends

- Savoury subcategories remain heavyweight
 - Graph 13: subcategories of sauces, seasonings and spreads* launches, 2018-23
- Savoury segments can explore more in veggie/fruit and meat/seafood flavours
 - Graph 14: top flavour component subcategories in sauces, seasonings and savoury spreads launches, 2018-23
- Flavourscape AI analyses launch activity to identify flavour opportunities – each symbol represents a flavour*

Sauces, Seasonings and Spreads – China – 2023

- Interpreting the map
- Find meat and seafood opportunities beyond beef and oyster flavours
- Product examples of trendy meat and seafood flavours
- Niche mushrooms and sour fruits are in the spotlight
- Product examples of trendy vegetable and fruit flavours
- NPD focus turns to naturalness, and there is still a gap in meeting consumer demands
 - Graph 15: important health-related claims of sauces, seasonings and spreads, consumer awareness vs share of product launches, 2023
- NPD focus turns to naturalness, and there is still a gap in meeting consumer demands
- Product examples of natural and minus claims

THE CONSUMER

Product penetration and purchase channel

- Hotpot dipping sauce and ketchup are embracing more home consumption occasions
 - Graph 16: product penetration of major sauces and spreads – purchased in any channel, 2022 vs 2023
 - Graph 17: ketchup penetration – purchased in any channel, by age of children in household, 2023
 - Graph 18: hotpot dipping sauce penetration – purchased in any channel, by generation, 2023
- Purchase patterns vary between fundamental and compound condiments
 - Graph 19: product penetration and purchase channel of major sauces and spreads, 2023
- Purchasing from more channels with fewer product types
 - Graph 20: purchase channel of major sauces and spreads – any purchased product, 2022 vs 2023
 - Graph 21: average types of major sauces and spreads purchased in each channel, 2022 vs 2023

Purchasing exotic sauces and spreads

- Plant-based spreads are winning more consumers
 - Graph 22: purchasing exotic sauces and spreads, 2021 vs 2023
- Females aged 18-24 are the key target group of plant-based spreads
 - Graph 23: purchasing exotic sauces and spreads, by gender and age, 2023
- Plant-based spreads have built a healthy image linked to light meals
- Product examples of plant-based spreads

Consumption frequency of compound seasoning packs

- Most compound seasoning packs continue to gain popularity
 - Graph 24: consumption frequency of compound seasoning packs, 2023
- Most compound seasoning packs continue to gain popularity
- Heavy users are more likely to substitute ready meals with homemade meals using compound seasoning packs
 - Graph 25: consumption frequency of compound seasoning packs – any consumed product, 2022 vs 2023

Sauces, Seasonings and Spreads – China – 2023

- Graph 26: "I prefer buying compound seasoning packs to cook by myself than buying ready-to-eat meals", by consumption frequency of compound seasoning packs, 2023
- Compound seasoning packs' main targets are less-experienced home cooks
- Clean label is key to further market expansion
 - Graph 27: select considering factors for purchasing sauces and seasoning products, by consumption frequency of compound seasoning packs, 2023

Health and safety attributes

- 'Zero additives' has become more critical, while organic has found more consumer interest
 - Graph 28: health and safety attributes of sauces and seasonings – first attribute, 2020 vs 2023
- Consumers' transparency focuses are skewed to safety issues
 - Graph 29: health and safety attributes of sauces and seasonings (NET), by considering factors for purchasing, 2023
- Different age groups have varied requirements for safety and health attributes
 - Graph 30: % point difference of health and safety attributes of sauces and seasonings (NET), segmented consumers by age of children in household vs average, 2023

Considering factors for purchasing

- Production date dominates purchasing factors due to safety and freshness demands
 - Graph 31: considering factors for purchasing sauces and seasoning products, 2023
- Condiments should harness the soft power of brand image...
 - ...especially for exotic sauces and spreads that demand 'authenticity'
 - Graph 32: "I prefer to purchase foreign sauces or seasonings products from foreign capital brands rather than those from domestic brands", by purchasing exotic sauces and spreads, 2023
 - Graph 33: considering factors for purchasing sauces and seasoning products, by purchasing exotic sauces and spreads, 2023
- Eye on the price more and follow the trends less
 - Graph 34: considering factors for purchasing sauces and seasoning products, 2019 vs 2023

Consumer behaviours

- Single-dish-specific compound sauces and seasonings will win more consumers
- Develop single-dish-specific products as boosters of culinary convenience and confidence
 - Graph 35: select consumer behaviours towards purchasing sauces and seasoning products – yes, by cooking and baking frequency, 2023
- Provide ageing consumers with products in familiar but more convenient packaging
 - Graph 36: "I prefer to purchase novel packaging sauces or seasoning products rather than common packages*", by generation, 2023
 - Graph 37: "I think the packaging of most sauce products on the market is convenient to use", by generation, 2023
- Target hands-on foodies with strong spending power
 - Graph 38: considering factors for purchasing sauces and seasoning products, by willingness to buy corresponding sauces or seasoning products and recreate foodservice dishes, 2023

Sauces, Seasonings and Spreads – China – 2023

- Graph 39: average types of purchased exotic sauces/spreads and consumed compound seasoning packs, by willingness to buy corresponding sauces or seasoning products and recreate foodservice dishes, 2023

Food personas

- Background of food personas
- Who are they?
- Food persona demographics overview
 - Graph 40: food personas, 2023
- Exotic sauces and spreads can be more transparent to win critical shoppers
 - Graph 41: average purchased types of exotic sauces and spreads, by food persona, 2023
- Opportunity for compound seasoning packs to touch emotional eaters
 - Graph 42: average consumed types of compound seasoning packs, by food persona, 2023

ISSUES AND INSIGHTS

Take taste buds on emotional flavour journeys

- Tap into emotional cravings
- Quantify sensory experiences
- Leverage emotional botanicals
 - Graph 43: experiencing select emotions, 2023
- Leverage emotional botanicals
 - Graph 44: flavour preferences associated with emotions, 2022
 - Graph 45: botanical flavour preferences associated with emotions, 2022
- Product examples of sauces, seasonings and spreads with botanical flavours

Cooking for one, flavoured for me

- Unpack the "me" market in an era of culinary individuality
 - Graph 46: size of family households, 2000-20
- Offer tailor-made diverse solutions for today's solo chef
 - Graph 47: select consumer behaviours towards purchasing sauces and seasoning products – yes, by living situation – solo, 2022 vs 2023
- Bring unboxing pleasure to solo diners

Savour the silver age with dietary and taste solutions

- Equip senior-friendly condiments with functionality
 - Graph 48: seniors' health conditions, 2023
- Blend healthy oils into compound sauces and seasonings
- Tackle age-related taste decline

APPENDIX – SIZE AND FORECAST, METHODOLOGY AND ABBREVIATIONS

- Market size and forecast
- Market segmentation – soy sauce
- Market segmentation – vinegar
- Market segmentation – oyster sauce
- Market segmentation – tomato sauce
- Market segmentation – salad dressing
- Methodology
- Abbreviations

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a Chinese licensed market survey agent ([See Research Methodology 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

email: 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
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850