

# TABLE SAUCES – GERMANY – 2020

Healthy options are vital to encourage increased usage of table sauces, especially as consumers scrutinise the healthiness of food since the COVID-19 outbreak.



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# Report Content



## EXECUTIVE SUMMARY

- Mintel's perspective

### Market context

- COVID-19 lockdown measures could benefit table sauces, at least in the short term
  - Graph 1: level of concern over the risk of being exposed to COVID-19, 27 March–6 April vs 21–29 April 2020
- Table sauces are widely popular in Germany, particularly among the youngest
  - Graph 2: types of table sauces eaten in the last three months, January 2020
- Growing single households and ageing population challenge the table sauce category
  - Graph 3: % of households by size, 2019–2024
- National reduction strategy on salt, sugar and saturated fat

### Mintel predicts

- Increasing consumption frequency is vital for category growth
- Value sales will see modest growth until 2024 with a peak in 2020 due to COVID-19

### What consumers want, and why

- Consumers want: naturalness and local ingredients
- Consumers want: healthier options
  - Graph 4: willingness to pay more for table sauces with select health attributes, by select age and parental status, January 2020
- Consumers want: versatile table sauces/dressings and usage guidance
  - Graph 5: usage behaviours towards table sauces, by age and parental status, January 2020
- Consumers want: table sauces/dressings that complement meat-free meals

### Opportunities

- Gut health grows in popularity and so can "gut-healthy" table sauces
- Target single households with smaller pack sizes
- Germans show great openness for new table sauces throughout all age groups

### The competitive landscape

- Brands lead for value sales, but private label is bigger by volume
  - Graph 6: company retail market share of table sauces, by value and volume, 2019
- Quick download resources



### THE IMPACT OF COVID-19

- COVID-19's impact on the broader category
- Market size & forecast following COVID-19 outbreak
- Key shifts in consumer behaviours
- How COVID-19 is impacting key consumer segments
  - Graph 7: "What impact do you think the COVID-19 outbreak will have on the following factors in Germany? - unemployment", 21-29 April 2020
- Acknowledging threats...
- ...and focusing on opportunities
- The impact of COVID-19 on the marketing mix
- How a COVID-19 recession will reshape the industry

### MARKET DRIVERS

- COVID-19 impacting on German consumers
  - Graph 8: level of concern over the risk of being exposed to COVID-19, 21-29 April 2020
- Germans are equally concerned about the impact on their lifestyle
- An ageing population will require a shift in focus
  - Graph 9: population by age group, 2014-24
- Number of single households will continue to grow
  - Graph 10: % of households by size, 2019-2040
- Germany, like much of Europe, is facing an obesity crisis
- Government reduction strategy on salt, sugar and saturated fat
- Germany introduces Nutri-Score labelling system on a voluntary basis
- Nutri-Score is designed to help consumers choose a healthy diet
- Packaging matters to consumers
- Government intervenes to reduce packaging waste

### WHAT CONSUMERS WANT, AND WHY

#### Usage and purchase of table sauces

- Table sauces have almost universal appeal
- Ketchup and mustard are most commonly used
  - Graph 11: types of table sauces eaten in the last three months, January 2020
- Daily usage peaks among users aged 16-34 and parents of under-16s
  - Graph 12: frequency of eating salad dressing, any sauce and other dressings in the last three months, January 2020
- 16-34s are core user of table sauces

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- Graph 13: usage of sauces/dressings/salad dressings at least three times a week in the last three months, by age, January 2020
- Small households need a boost
  - Graph 14: usage of sauces/dressings/salad dressing at least three times a week in the last three months, by household size and parental status, January 2020
- Ketchup and mustard appeal to different age groups
  - Graph 15: usage of ketchup and mustard by age and parental status, January 2020
- "Not for the young ones!"
- International inspiration: ketchup for grownups
- Reach new target groups with mustard
- "Real treat for all young fine foods pros"
- Women and men have different table sauce preferences
  - Graph 16: usage of sauces and dressings in the last 3 months, by gender, January 2020

### Attributes of table sauces & dressings that consumers are willing to pay more for

- Three in five Germans buy table sauces
  - Graph 17: purchase of sauces or dressings in the last three months, by age and parental status, January 2020
- All-natural ingredients is the key attribute that consumers would pay more for
  - Graph 18: attributes of table sauces that consumers are willing to pay more for, January 2020
- All-natural ingredients offer table sauces a compelling selling point
  - Graph 19: willingness to pay more for table sauces with all-natural, all-German or luxury ingredients, by age, January 2020
- Launches with all-natural ingredients are rare
- Mintel Trend The Real Thing
- All-German/local ingredients can help table sauces to drive interest
- Healthier options are considered worth paying more for
  - Graph 20: willingness to pay more for table sauces with select health attributes, by age and parental status, January 2020
- Premiumise with healthier options
- International inspiration: cold-pressed table sauces
- Calorie-free and low calorie sweeteners in table sauces
- Calorie-free and low calorie sweeteners are seen as less healthy than other sugars and sweeteners, except for Stevia
  - Graph 21: perceptions of sugars and sweeteners as healthy, 2018
- Fermented food have consumers attention
- Fermented table sauces/dressings have an opportunity in gut health
  - Graph 22: using fermented sauces/dressings is a good way to support gut health, January 2020
- Gut health is a leading diet-related goal
- International inspiration: use fermentation to tap into gut health

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- Artisan table sauces make a mark
  - Graph 23: further attributes of sauces/dressings consumers are willing to pay more for, by age and parental status, January 2020
- Premiumise using artisanal cues and restaurant recipes
- Cross category inspiration: replicate the restaurant experience at home

### Behaviours towards table sauces and dressings

- Table sauces must be versatile
  - Graph 24: behaviours toward sauces & dressings, January 2020
- Consumers need guidance on ways to use table sauces/dressings
  - Graph 25: usage behaviours towards sauces/dressings, by age and parental status, January 2020
- Table sauces need to be versatile
- Recipes encourage the purchase of table sauces
- German consumers show great openness for trying new table sauces/dressings
  - Graph 26: interest in buying sauces/dressings with authentic street food inspired flavours and kits for making table sauces, January 2020
- Look to international cuisines for flavour inspiration

### Interest in condiment & dressing attributes

- Table sauces with natural ingredients raise interest
  - Graph 27: interest in buying condiment & dressings with certain attributes, January 2020
- Single-portion packs appeal especially to single-households
  - Graph 28: attitudes toward single/smaller portion sizes, by household size and parental status, January 2020
- Table sauce brands should look to target singles
- Besides singles, parents and larger households are a target group for smaller pack sizes
- International inspiration: products for single households
- Champion the waste prevention cause
  - Graph 29: behaviour and attitudes toward environmentally friendly packaging and preventing food waste, January 2020
- Ride on the green wave
- Food waste is a global hot-button issue

### Attitudes towards table sauces

- Table sauces can support the taste credentials of meat-alternatives
  - Graph 30: attitudes toward sauces/dressings, January 2020
- Table sauces can make meat-free meals more enticing
  - Graph 31: attitudes toward vegan table sauces and sauces for meat-free meals, January 2020
- Table sauce brands can step in to play a role in boosting plant-based meals
- Table sauces can add value to plant-based meals

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- Highlight how table sauces can boost plant-based meals or meat-alternatives

### LAUNCH ACTIVITY AND INNOVATION

- Natural is the top claim for sauce launches in Germany
  - Graph 32: table sauce launches, by top five claim categories, 2016 and 2019
- Sustainable and environmentally friendly packaging claims are rare
  - Graph 33: launches of table sauces with select ethical claims, 2015 and 2019
- Give information about the carbon footprint
- Ethical claims appeal to consumers
- Smooth remains top texture for table sauces
- Aceto Balsamico to grate
- Plant-based table sauces can be expected to grow
- Low/no/reduced sugar, fat and calorie launches gained share in 2019
  - Graph 34: launches of table sauces with selected health claims, 2015 and 2019
- International inspiration: look to sugar alternatives to elevate a clean label proposition
- International inspiration: ketchup without added sugar and with locally sourced ingredients
- International inspiration: "healthier" table sauces aimed at kids
- Table sauces are behind the curve on functional claims but fermented sauces have an opportunity to shine as a natural probiotic
  - International inspiration: table sauces with prebiotics
  - International cross-category inspiration: Culinary CBD Extra Virgin Olive Oils
  - Opportunity to attract older consumers to ketchup with sophisticated variants
  - International inspiration: attract younger adults with alcohol versions
  - Opportunity for brands to cross categories into table sauces
  - Seasonal or limited edition launches of table sauces are very rare
    - Graph 35: launches of table sauces, by positioning claims, 2019
  - Premiumisation through luxurious ingredients
    - International inspiration: Premiumisation through luxurious ingredients
  - International flavours for more flavour variety
- Five of the top 10 players in terms of NPD are retailers
  - Graph 36: Table sauce launches, by top 10 companies, 2019
- Brands lead NPD in table sauces
  - Graph 37: table sauce launches by brands vs private labels, 2015-19
- Innovative market with high penetration
  - Graph 38: table sauce launches by launch type, 2015-19

### Advertising and marketing activity

- "Sauces to stay"

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- Kühne Made for Meat
- Customisation of table sauce labels

### MARKET SHARE

- Nestlé, Kraft and Hela take the lead in Germany's table sauce market

#### Retail market share of table sauces, by value, 2018-19

- Brands continue to dominate value...

#### Retail market share of table sauces, by volume, 2018-19

- ...and volume shares

### MARKET SEGMENTATION, SIZE AND FORECAST

#### Forecasting during the COVID-19 pandemic

- Note on forecast in response to COVID-19
- Value sales will see modest growth until 2024 with a peak in 2020
- Table sauce values projected to grow by 16.8% over 2019-24...
- ...while volumes are forecast to grow by 5% over 2019-24
- Brown sauces leads value and ketchup volume sales
- Brown sauces comprises the biggest value share
- Ketchup makes up the largest volume share

### APPENDIX

#### Note on COVID-19

- COVID-19's impact on sauces/dressings and German consumer behaviour

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology

#### Appendix - market size and forecast

- Market size and forecast - value
- Market size and forecast - volume

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