

The Grocer

Focus On: Sauces & Condiments by Robyn Vinter (robynvinter@gmail.com)

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The Story

It's not so much that Brits are going off the sauce; more that they're increasingly unwilling to spend much money on it. The sauces & condiments market has seen sales fall 2.4% in the past year; volumes have inched up 0.6%. What's driving this performance? Which retailers and brands are winning in this environment? Who's losing? Why? And what does the coming year hold?

Key themes (this list is not exhaustive; we will investigate new angles as they arise):

Types of sauces: Barbecue and chilli sauce are in strong growth, ketchup and other British classics are holding steady, while salad cream is struggling. This feature will pay close attention to the factors affecting these disparate performances. What is being done to return struggling sectors to growth and sustain growth of others?

The weather: Table sauces consumption goes up in times of hot weather as Brits break out the barbies. So how big a factor has the weather been on the category in the past year? How do brands use things like ads and promotions to drive sales when the sun began to shine? How's this summer's weather affected sales?

The next big thing: This feature will investigate in detail the food trends that are likely to shape new products, from brands large and small, over the coming 12 months. We're particularly interested in hearing from smaller brands that have or are looking to break into the supermarkets.

Retailers: This feature will focus on how retailers' strategies have evolved in the category over the past year, with particular attention being paid to the development of own label ranges, merchandising and brand listings. What's driving the decline of the grocery multiples and the rising sales of the discounters and pound stores?

Own label v brands: Own label is in strong volume growth but value is lagging behind. This feature will investigate why this is. Crucial to this feature will be analysis of how brands are using factors such as NPD, price promotions and marketing & advertising to counteract the march of own label. Which brands are performing strongest?

Innovation: A discussion of the latest NPD, from new, premium mayonnaise and ketchup variants to format innovation such as non-drip bottles, will be central to this feature. How has innovation impacted the performances of specific brands and what's on the cards in terms of innovation this year? We will profile eight of the most interesting new launches in a separate innovation panel.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?