

The Grocer

Focus On: Pasta & Pasta Sauces by Natalie Brown (natalie_brown@live.co.uk)

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The Story

What inflation? As prices rise elsewhere in grocery, the average price of pasta is falling as retailers fight tooth and nail to keep hold of shoppers. But despite falling prices, volumes are also down. What can retailers and manufacturers do to drive growth in this increasingly difficult climate? How are input costs being affected by all the economic uncertainty? Why are Brits eating more fresh filled pasty (the only sector in growth)? And what can be done to return sauces to growth?

Key themes:

Health: This feature will pay particular attention to how the pasta sauces sector has been impacted by growing concern over the sugar content of cooking sauces and the decision of one manufacturer to advise that consumers shouldn't be eating such products more than once a week. Also, how are the high protein/low carb, wholegrain and ancient grain trends affecting things?

Cooking trends in sauces: Pasta continues to outperform sauce as consumers continue to make their own sauces from scratch – it's worth noting that tomato-based cooking products such as canned tomatoes and puree have enjoyed significant growth in recent years. . How are retailers and brands capitalising on this?

Fresh v ambient: Fresh pasta is growing ahead of the overall market. Why is this? Are retailers giving over more chiller space to such products? Which brands are cashing in? What can ambient players do to fight back?

Own label v brands: Own label continues to steal share from brands in pasta and pasta sauces. Why is this? And what impact is this having on overall category value? How can brands add value back into the sector?

Retail split: This feature will include in depth analysis of different retailers' strategies with pasta and pasta sauces and how this affecting performance. How have retailers' ranges changed over the past year to reflect current trends? Are we seeing the same rationalisation of ranges elsewhere in grocery?

Prices and promotions: This feature will investigate how big a part price promotions have played in the market over the past year. Retailers are pushing hard on cupboard staples, so how is this affecting pasta and pasta sauces? Which areas have seen the biggest changes and why?

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market. 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?