

The Grocer

Focus On: Sauces & Condiments, publishing 8th September Online Listicle to go live on 10th August

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The Story

What was that about Brits splashing out posher ketchup? When it comes to sauces, consumers want something cheap for their chips. That's partly because they can't get enough of the stuff. Over the past year, the nation has bought an extra 8.2 million kilograms of sauces and condiments – a habit that could make them ultra-sensitive to price rises. But the downward pressure on prices is also a result of fierce competition from brands. The big boys have been promoting heavily to lure in shoppers, resulting in average prices decreasing by as much as 2.5% in mayonnaise. So will all this competition drive value out of sauces? Or can consumers be persuaded to part with more of their cash?

Online Listicle: We look at new launches of healthy sauces

Key themes:

Price: Despite inflation elsewhere in store, average prices are down for all sauces aside from brown and soy sauce. To what extent is this led by brands promoting heavily, and to what extent is it led shoppers looking for a deal? Own label is up 4.4%, suggesting consumers are looking for cheaper options.

Mayonnaise: Having stolen the top spot from ketchup last year, mayo is continuing on its upward trajectory with a 5% increase in volume. Consumer appetite has even spawned mayo ice cream. But this new-found popularity has made it a key battleground for price as Heinz goes head to head with Hellmann's. Who can win battle of the mayo brands?

Posh sauces: A number of challenger brands in the market are promoting the benefits of a 'posh sauce'. So what chance do they have in such a price-led market? Are there certain occasions when consumers will be willing to trade up e.g. for BBQs and gourmet burgers?

Adding value: How can brands add value to the market if they're not premium? One option is through 'skinnier' products including less sugar ketchup, zero calorie sauces and protein ketchup. Or how about unusual flavours? 'Other sauces' – which include peri peri, dipping sauces, pepper sauces – are up 7.8% in value. Which flavours are consumers particularly buying into?

Condiments: Amid all this price-led buying in sauces, condiments tell a completely different story. Volumes are down for almost every condiment amid an average price rise of 3.2%. So why are Brits falling out of love with condiments? Are prices becoming prohibitive or is there something else at play?

Hot sauces: Chilli and tabasco are up 29.5% in value as the nation's love of hot sauces continues. How are brands capitalising on this and what innovation has there been in this area?

Salad cream: Do we still eat salad cream? Kantar data suggests we do, but is there a generational shift? What else are we doing with our salads?

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 recent innovations and weigh up which new launches are most likely to encourage future growth in the market. We will profile 4 of these in separate innovations panel including launch date, RSP and an image.

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 has merchandising changed in the market?