

The Grocer

Focus On: Cooking Sauces by Amy North (Amy.North@thegrocer.co.uk)

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The Story

Prices are plummeting in cooking sauces, with value down for all of the top five brands. What's more, the losses aren't down to temporary deals; in many cases base prices are being cut. So who's suffering most? To what extent is the deflation down to brands moving into the discounters? How is the retail mix changing in cooking sauces? And, with some brands defying the decline, what's the secret to success in this commoditised sector?

Key themes:

Different cuisines: This feature will explore in detail the factors that are leading to differing fortunes of different kinds of cuisines and investigate how brands and retailers are affecting sales. Particular attention will be paid to the impact meal kits and scratch cooking are having on different kinds of cuisines. What will be the next big cuisine?

Innovation: This will be key to this feature. We will be investigating how successful the raft of innovation last year has been in driving growth and value back into the category. What innovation will we be seeing in 2015? The article will feature a panel profiling four of the most interesting upcoming/recent cooking sauce launches.

Formats: This feature will include a box out on how formats are changing in cooking sauces. To what extent has the growth of certain smaller players been driven by the development of more innovative formats such as pouches to cater for smaller households, pots of paste for home cooks, sachets and concentrated stir-in sauces?

Discounters/retail mix: This will be a central focus of this article, with particular attention being paid to how the product ranges of Aldi, Lidl, M&S, Waitrose and The Co-op (the only significant players in any growth in this market) are developing. Is their growth being driven by brands or own label? How are the big four responding?

Prices/promotions: According to our research, average prices have fallen by almost 3% in the past year, in spite of a decrease in volume sold on deal. To what extent is this down to base prices being cut? Why are prices being cut? What needs to be done to get the market back in growth?

Brands v own label: Our research suggests that branded cooking sauces' loss has been own label's gain. To what extent is this down to the growth in the more own label reliant discounters? Which other retailers are driving this? How have own label ranges been developed over the past year and what's in store over the coming year?

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?