



## Contents

### Introduction and Abbreviations

*Definitions*

*Consumer research*

*ACORN*

*Advertising data*

### Abbreviations

### Premier Insight

*Capitalising on e-marketing tools*

*Fighting back against the competition*

*Accommodating flexible eating*

### Executive Summary

*Fall from grace in 2004*

*Lacklustre sales in formerly buoyant pasta sauce segment*

*Opportunity inherent in one-person households*

*Rate of decline accelerates in dry cooking sauce market*

*Fresh chilled segment on the up*

*Nature of supply Wet/ambient*

*Dry*

*Above-the-line spend*

*Distribution issues*

*Focus on the consumer*

*Pour-over segment in decline*

*Younger age bias augurs well for the future*

*User-friendly and a good storecupboard item*

*Few detractors but are BOGOFs hampering growth?*

*Future in the melting pot*

*A market prognosis*

*More life in the (older) dog yet?*

### Market Drivers

*Working women*

Figure 1: Workforce in employment in the UK, by gender, 1999-2008

*The convenience seeker*

*Household size*

Figure 2: UK households and one-person households, 1999-2008

*The demographic picture*

Figure 3: Trends and projections in total UK population, by age group, 1999-2008

*Variety and experimentation*

*Health and diet for the older groups*

### *Attitudes towards food*

Figure 4: Agreement with attitudes towards food, diet and meal occasions, 1999-2004

The ethnic equation - a penchant for 'foreign' food

Competition from other segments

Time-poverty?

*Sitting down at table*

*A penchant for new products*

### **Market Size**

Figure 5: UK retail value sales of cooking sauces, 1999-2004

*Wet vs dry sauces*

Figure 6: UK retail sales of cooking sauces, by type, 2002 and 2004

*Slowing pasta sauce sector - moving towards saturation*

*Fresh is best*

*Ambient/wet cooking sauces*

Figure 7: UK retail sales of ambient wet cooking sauces, by flavour type, 2002 and 2004

*Mixed performances*

*Traditional/casserole*

*Indian sauces*

*Oriental sauces*

*Mexican/American/other sauces*

*Organic and reduced fat products making gains*

### **Market Segmentation**

Figure 8: UK retail value sales of ambient wet cooking sauces, 1999-2004

*Dry cooking sauces*

Figure 9: UK retail value sales of dry cooking sauces, 1999-2004

Between a rock and a hard place

Figure 10: UK retail sales of dry cooking sauces, by type, 2002 and 2004

*Fresh chilled sauces*

Figure 11: UK retail value sales of fresh chilled cooking sauces, 1999-2004

Figure 12: Retail sales of fresh cooking sauces, by sector, 2002 and 2004

*Establishing a point of difference*

*Low-fat and organic*

### **The Supply Structure**

Nature of supply - ambient/wet cooking sauces

Nature of supply - dry cooking sauces

### **Companies and brands**

*Wet (pasta) sauce sector*

Figure 13: Manufacturers' shares in the wet Italian (pasta) sauce sector, 2002 and 2004

*Wet/ambient (excluding pasta) sauce*

Figure 14: Manufacturers' shares in the wet/ambient cooking sauce sector (excluding pasta), 2002 and 2004

*Dry sauces*

Figure 15: Manufacturers' shares in dry cooking sauces, 2002 and 2004

### **Company profiles**

*Unilever Bestfoods*

*Masterfoods*

*Campbell Grocery Products*

*RHM - Sharwood's and Bisto*

*Schwartz*

*Premier International Foods*

*Sacla UK*

*Patak's*

## **Other players**

*Own-label*

Figure 16: Selected own-label products, by sector, November 2004

*Fresh chilled cooking sauces*

## **New Product Briefs**

*November 2004*

*October 2004*

*September 2004*

*August 2004*

## **Advertising and Promotion**

*Above the line*

Figure 17: Main monitored media advertising expenditure on cooking sauces, 1999-2004

Top advertisers

Figure 18: Main monitored media advertising expenditure on cooking sauces, by top spenders, 2003

Masterfoods

Campbell's

Unilever Bestfoods

Sharwood's

RHM

Patak's

McCormick

New Covent Garden Food Company

*Below the line*

## **Distribution**

Figure 19: UK retail value sales of cooking sauces, by type of outlet, 2000-04

*Merchandising*

Category management initiatives

Chilled sauces

## **The Consumer**

*Trends in usage*

Cooking sauces Figure 20: Use of cooking sauces, by type, 2002-04

Cook-in sauces

Figure 21: Weight of usage of cook-in sauces, 2002-04

*Pour-over sauces*

Figure 22: Weight of usage of pour-over sauces, 2002-04

*Any cooking sauces - overall penetration*

Figure 23: Weight of usage of any cooking sauce, 2002-04

Figure 24: Usage of any cooking sauce, by gender, age and socio-economic group, 2004

Figure 25: Usage of any cooking sauce, by lifestage and presence of children, 2004

Figure 26: Usage of any cooking sauce, by working status, household size and region, 2004

*Pour-over sauces*

Figure 27: Usage of cook-in sauces, by gender, age and socio-economic group, 2004

Age is a key criterion

Figure 28: Usage of cook-in sauces, by lifestage and presence of children, 2004

*Packaging: a key issue*

Figure 29: Usage of cook-in sauces, by working status, household size and region, 2004

*Single-serve opportunity*

*Something for everyone*

*Pour-over sauces*

Figure 30: Usage of pour-over sauces, by gender, age and socio-economic group, 2004

*Under-35s a key consumer segment*

*ABs less inclined to be heavy users of pour-over sauces*

*Usage of pour-over sauce by lifestage and presence of children*

Figure 31: Usage of pour-over sauces, by lifestage and presence of children, 2004

*Family group again the key segment*

*Third age market ripe for exploitation*

Figure 32: Usage of pour-over sauces, by working status, household size and region, 2004

*Working status: a key variable*

*Cooking sauces by type of dish*

Figure 33: Use of cook-in sauces, by type of dish, 2002-04

Figure 34: Use of pour-over sauces, by flavour, 2002-04

*Exclusive consumer research*

Figure 35: Usage of different types of cooking sauces, August-September 2004

*Chicken gaining popularity as a host*

**Families the core market**

*ABC1 pre-/no family group - ready for development*

*Two full-time earners - important fish to fry*

*Cooking sauces a boon to working adults*

*Smaller households an opportunity to be exploited*

**Detailed Demographics: Usage of cooking sauces**

Figure 36: Usage of different types of cooking sauces, by gender, age and socio-economic group, August-September 2004

Figure 37: Further usage of different types of cooking sauces, by gender, age and socio-economic group, August-September 2004

Figure 38: Usage of different types of cooking sauces, by lifestage, presence of children and Mintel's Special Groups, August-September 2004

Figure 39: Further usage of different types of cooking sauces, by lifestage, presence of children and Mintel's Special Groups, August-September 2004

Figure 40: Usage of different types of cooking sauces, by working status and household size, August-September 2004

Figure 41: Further usage of different types of cooking sauces, by working status and household size, August-September 2004

Figure 42: Usage of different types of cooking sauces, by region and ACORN categories, August-September 2004

Figure 43: Further usage of different types of cooking sauces, by region and ACORN categories, August-September 2004

Figure 44: Usage of different types of cooking sauces, by media usage, commercial TV viewing and supermarket usage, August-September 2004

Figure 45: Further usage of different types of cooking sauces, by media usage, commercial TV viewing and supermarket usage, August-September 2004

**The Consumer: Attitudes and Typologies**

Figure 46: Attitudes towards cooking sauces, August-September 2004

*User-friendly and a good storecupboard item*

*Few detractors, but are BOGOFs hampering growth?*

*Women see cooking sauces as storecupboard basics*

*Link between cooking sauces and families reinforced*

*Something for during the week?*

*Cooking sauces fit 'cafeteria' eating scenario*

*A can't cook generation*

*Attitudes towards cooking*

Figure 47: Attitudes towards cooking, August-September 2004

*Give it up for the fun loving pre-/no families*

*Consumer typologies*

Figure 48: Consumer typology groups for attitudes towards cooking sauces, August-September 2004

*Quick Cooks (15% of respondents)*

Prepared Cooks (19% of respondents)  
Unconcerned (49% of respondents)  
Cooking Sauce Connoisseurs (7% of respondents)  
Supplementary Cooks (10% of respondents)

*Women less blasè about cooking sauces*

*Prepared Cooks exhibit gender split*

*15-24-year-olds firmly in Unconcerned camp*

*Higher socio-economic groups under-represented among Unconcerned*

*Scots main Quick Cooks*

*A dramatic North/South divide*

*Prepared Cooks skewed to more affluent groups*

*Less affluent, less involved*

*A family affair*

*Media round-up*

*Typologies by type of sauce bought*

Figure 49: Repertoire purchasing of cooking sauces, by cooking sauce typology, August-September 2004

*Fresh chilled and stir-in: growing segments*

*Dry sauces - a storecupboard item*

*Cans popular with Connoisseurs*

### **Repertoire analysis**

Figure 50: Repertoire purchasing of cooking sauces, by key cooking sauce type, August-September 2004

*Fresh/chilled sauces - part of a larger repertoire*

Figure 51: Number of cooking sauce types bought, by cooking sauce cluster type, August-September 2004

*Connoisseurs and Supplementary Cooks - the main target*

*Correlation analysis*

Figure 52: Correlation analysis of purchasing of cooking sauce types, August-September 2004

*Fresh/chilled stir-in sauces - an opportunity*

*Detailed Demographics: Attitudes towards cooking sauces*

Figure 53: Attitudes towards cooking sauces, by gender, age and socio-economic group, August-September 2004

Figure 54: Attitudes towards cooking sauces, by lifestage, presence of children and Mintel's Special Groups, August-September 2004

Figure 55: Attitudes towards cooking sauces, by working status and household size, August-September 2004

Figure 56: Attitudes towards cooking sauces, by region and ACORN categories, August-September 2004

Figure 57: Attitudes towards cooking sauces, by media usage, commercial TV viewing and supermarket usage, August-September 2004

Figure 58: Further attitudes towards cooking sauces, by gender, age and socio-economic group, August-September 2004

Figure 59: Further attitudes towards cooking sauces, by working status and household size, August-September 2004

Figure 60: Further attitudes cooking sauces, by lifestage, presence of children and Mintel's Special Groups, August-September 2004

Figure 61: Further attitudes towards cooking sauces, by media usage, commercial TV viewing and supermarket usage, 2004

*Attitudes towards cooking: Demographic Breakdown*

Figure 62: Attitudes towards cooking, by gender, age and socio-economic group, August-September 2004

Figure 63: Attitudes towards cooking, by working status and household size, August-September 2004

Figure 64: Attitudes towards cooking, by lifestage, presence of children and Mintel's Special Groups, August-September 2004

Figure 65: Attitudes towards cooking, by region and ACORN categories, August-September 2004

Figure 66: Attitudes towards cooking, by media usage, commercial TV viewing and supermarket usage, August-September 2004

Figure 67: Further attitudes towards cooking, by gender, age and socio-economic group, August-September 2004

Figure 68: Further attitudes towards cooking, by working status and household size, August-September 2004

Figure 69: Further attitudes towards cooking, by lifestage, presence of children and Mintel's Special Groups, August-September 2004

Figure 70: Further attitudes towards cooking, by region and ACORN categories, August-September 2004

Figure 71: Further attitudes towards cooking, by media usage, commercial TV viewing and supermarket usage, 2004

#### *Consumer typologies: Demographic Breakdown*

Figure 72: Cooking sauce typologies, by gender, age and socio-economic group, August-September 2004

Figure 73: Cooking sauce typologies, by region and ACORN categories, August-September 2004

Figure 74: Cooking sauce typologies, by lifestage, presence of children and Mintel's Special Groups, August-September 2004

Figure 75: Cooking sauce typologies, by media usage, commercial TV viewing and supermarket usage, August-September 2004

### **The Future**

*A market prognosis*

*Demographic trends*

*Fresh chilled cash cow of the future? - watch this space*

*Burning issues - anti-carb short-term fad or what?*

*Future assured*

*Convenience the rallying call*

*The competitive edge*

*New cuisines on the horizon?*

*Wet sauces expected to grow*

### **Forecast**

*Cooking sauces to show steady growth*

Figure 76: Forecast of the UK market for cooking sauces, 2004-09

*The extent of competition*

*Wet sauces*

*Dry sauces*

*Fresh chilled sauces*

Figure 77: Forecast indexed growth of cooking sauces, at current prices, 2004-09

*Factors incorporated in the forecast*

**12/2004**