

## Bottled Sauces - UK - November 2010

Report Price: £1500 / \$2310 / €1793



### What is this report about?

Estimated to reach £555 million in 2010, the bottled sauces sector has enjoyed sales growth of almost 26% between 2005 and 2010. Almost all consumers (99%) are using bottled sauces, with the most common repertoire being between six and ten different types of sauces. Table sauces dominate the market, accounting for 53% of the market, while mayonnaise accounts for 21%.

The major brands have been building on their brand equity by entering competing markets, with Hellmann's launching a ketchup and Heinz a mayonnaise. This follows Branston's successful move into the table sauces category. Innovation has focused on flavours and pack sizes, accommodating changing consumer needs. Such NPD has encouraged consumers to use bottled sauces for different occasions and on a more frequent basis.

Above-the-line support has continued, with Hellmann's particularly investing heavily to communicate NPD to consumers and prevent any devaluation of the brand.

### What have we found out?

- The future growth of the 25-34 population bodes well for the bottled sauces sector as this group is the most prolific in its repertoire of sauces and highly willing to try new varieties and flavours.
- Those in the AB socio-economic group are certainly motivated by premium products, dominating consumption for the majority of sauces including balsamic vinegar, mustard and Oriental sauces. This group are also the prime target for brands looking to drive sales by encouraging the use of sauces to customise meals.
- Advertising aimed at promoting the versatility of bottled sauces should focus on women, as they are the most likely to use bottled sauces in a variety of ways with men sticking to using them primarily as an accompaniment.
- Products with a strong healthy eating message, either in terms of free-from or low calorie content claims, can be used to tap in the 38% of consumers, particularly women and households with children, for whom health is an important factor.
- The development of natural sweeteners, such as stevia and xylitol, as highlighted by the launch of Xylitol tomato ketchup in the UK, could be more widely adopted by the major players in the bottled sauces market, giving peace of mind to parents looking for a healthier alternative for the children, or themselves.
- Brands and manufacturers have been seeing a polarisation in sizes over the past couple of years, as they attempt to cater for the surge in one-person households while offering value options for families during times of economic uncertainty. Offering bottled sauces in a wider variety of formats and sizes, especially in the categories such as ketchup and mayonnaise where penetration is so high, is helping to keep the sector fresh and meet consumers' needs.

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