

Seasonings and Stocks - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Sustained interest in scratch cooking should benefit the market, particularly with the impending squeeze on consumer incomes. Seasoning brands need to target home cooks wanting to add an element of creativity to their dishes.”

– **Alyson Parkes, Research Analyst**

This report looks at the following areas:

- Scope for seasonings to be used as salt substitutes
- Guidance is needed to further inspire consumers to use seasonings
- Engaging younger age groups is key to stocks' longevity

Usage of seasonings and stocks remains high, these being staple kitchen-cupboard ingredients for the majority of consumers. The total market has been in long-term value growth since 2011 and this trend is expected to continue to 2021. While both segments should benefit from their intrinsic link with scratch cooking, inflation is expected to contribute to value growth.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Seasonings and Stocks - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market
Substantial value sales growth in the market
Value growth forecast for the market over 2016-21
Figure 1: Forecast of UK retail sales of seasonings and stocks, by value, 2011-21

Stocks are under pressure to engage young generations
Popularity of scratch cooking will sustain category
Foodservice can provide inspiration for seasonings
Salt reduction still a focus for government health campaigns
Companies and brands
Own-label dominates seasonings
Figure 2: Leading brands' shares in the UK seasonings market, by value, 2014-16

Knorr and Oxo dominate stocks market
Figure 3: Leading brands' value shares in the UK retail stocks market, 2014-16

Sainsbury's overhauls own-label seasonings, Asda moves into frozen
Steep decline in overall advertising spending
The consumer
Seasonings are a menu staple
Figure 4: Usage of seasonings, by type, March 2017

Variety packs spark widespread interest
Seaweed as a salt substitute appeals to the affluent
Figure 5: Interest in buying seasoning products and formats, March 2017

Seven in 10 want to add a "wow factor" to dishes
Two in five seasoning users look to replicate meals eaten out of home
Figure 6: Behaviours related to seasonings, March 2017

Over three quarters of consumers use stocks
Figure 7: Usage of stocks, by type, March 2017

New associations are needed to engage 16-24s
Figure 8: Usage occasions of stocks, March 2017

Stocks can move into seasonings territory
High uncertainty around the flavour of gluten-free stocks
Figure 9: Behaviours related to stocks, March 2017

What we think

Issues and Insights

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Seasonings and Stocks - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Scope for seasonings to be used as salt substitutes

The facts

The implications

Guidance is needed to further inspire consumers to use seasonings

The facts

The implications

Engaging younger age groups is key to stocks' longevity

The facts

The implications

The Market – What You Need to Know

Substantial value sales growth in the market

Value growth forecast for the market over 2016-21

Stocks are under pressure to engage young generations

Popularity of scratch cooking will sustain category

Foodservice can provide inspiration for seasonings

Salt reduction still a focus for government health campaigns

Market Size and Forecast

Substantial value sales growth in the market

Figure 10: UK retail value sales of seasonings and stocks, 2011-21

Figure 11: UK retail value sales of seasonings and stocks, by segment, 2011-21

All seasoning sectors grew sales in 2016

Figure 12: UK retail value sales of seasonings, 2015 and 2016

Value growth forecast for the market over 2016-21

Figure 13: Forecast of UK sales of seasonings and stocks, by value, 2011-21

Scratch cooking to sustain seasonings market

Figure 14: Forecast of UK sales of seasonings, by value, 2011-21

Stocks are under pressure to engage young generations

Figure 15: Forecast of UK sales of stocks, by value, 2011-21

Forecast methodology

Market Drivers

Popularity of scratch cooking will sustain category

Figure 16: "Typically, how often do you cook meals from scratch?", April 2016-March 2017

Foodservice can provide inspiration for seasonings

Salt reduction still a focus for government health campaigns

Weak Pound will push up inflation

Squeeze on incomes is, however, unlikely to deter consumers from the category

Companies and Brands – What You Need to Know

Own-label dominates seasonings

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Seasonings and Stocks - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Knorr and Oxo dominate stocks market
Sainsbury's overhauls own-label herbs and spices range
Asda targets scratch cooks with range of frozen herbs and spices
Steep decline in overall advertising spending
Premier Foods brings the Oxo Family back to TV
Cutting-edge outdoor advertising from Knorr

Market Share

Own-label dominates seasonings
Schwartz sees sales fall and loses market share
Figure 17: Leading brands' value sales and shares in UK retail seasonings market, 2014-16
Knorr and Oxo dominate stocks market
Figure 18: Leading brands' value sales and shares in UK retail stocks/bouillon market, 2014-16

Launch Activity and Innovation

Own-label extends share of NPD
Figure 19: New product launches in the seasonings and stocks market, by own-label and brands, 2013-16
Sainsbury's overhauls own-label herbs and spices range...
Figure 20: Share of new product launches in the seasonings and stocks market, by top 10 companies, 2013-16
...and adds Spice Drops to its listing
Oxo launches liquid stock range
Tesco revamps stock pots and introduces spices for charity
Asda targets scratch cooks with range of frozen herbs and spices
New look for Knorr
Schwartz unveils gluten-free recipe mixes

Advertising and Marketing Activity

Steep decline in overall advertising spending
Figure 21: Total above-the-line, online display and direct mail advertising expenditure on seasonings and stocks, 2013-16
TV attracts the greatest percentage of adspend despite cutbacks
Premier Foods brings the Oxo Family back to TV
Figure 22: Recorded above-the-line, online display and direct mail total advertising expenditure on seasonings and stocks, by top brands, 2013-16
Cutting-edge outdoor advertising from Knorr
Schwartz looks to digital activity to promote seasoning ranges
Bisto takes 'Together Project' campaign to the radio
Unilever plays up WWII connections for Bovril
Nielsen Ad Intel coverage

The Consumer – What You Need to Know

Seasonings are a menu staple
Variety packs spark widespread interest
Seaweed as a salt substitute appeals to 44%

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Seasonings and Stocks - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Seven in 10 want to add a "wow factor" to dishes
- Over three quarters of consumers use stocks
- New associations are needed to engage 16-24s
- Stocks can move into seasonings territory
- High uncertainty around the flavour of gluten-free stocks
- Two in five seasoning users look to replicate meals eaten out of home

Usage of Seasonings

- Seasonings are a menu staple
 - Figure 23: Usage of seasoning, by type, March 2017
- Salt sees usage decline
- Flavoured salt popular amongst young cooks

Interest in Seasoning Products and Formats

- Variety packs spark widespread interest
- Interest peaks among under-35s and those lacking kitchen space
 - Figure 24: Interest in buying seasoning products and formats, March 2017
- Fair trade is important to younger consumers
- Parents show high interest in spice blends for adding at the table...
 - ...and for seasonings tailored to specific vegetables
- Seaweed as a salt substitute appeals to the affluent

Behaviours Related to Seasonings

- Seven in 10 want to add a "wow factor" to dishes
 - Figure 25: Behaviours related to seasonings, March 2017
- Recipes dictate seasonings purchases for nearly half
- Under-35s most likely to just follow recipes
- Two in five seasoning users look to replicate meals eaten out of home
 - Figure 26: Seasonings and stocks – CHAID – Tree output, March 2017
- Methodology

Usage of Stocks

- Over three quarters of consumers use stocks
 - Figure 27: Usage of stocks, by type, March 2017
- Ready-to-use liquids are most popular amongst the affluent

Usage Occasions of Stocks

- Stocks are dependent on traditional dishes
- New associations needed to engage 16-24s
 - Figure 28: Usage occasions of stocks, March 2017
- Opportunity for stocks to be tailored to meals

Behaviours Related to Stocks

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Seasonings and Stocks - UK - May 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Stocks can move into seasonings territory

Figure 29: Behaviours related to stocks, March 2017

High willingness to pay more for all-natural stocks

Scope for stocks to explore emerging cuisine flavours

High uncertainty around the flavour of gluten-free stocks...

...and varying agreement that low-salt stocks deliver on flavour

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Drivers

Figure 30: "Which, if any, of the following factors are most important to you when looking for healthy foods?", April 2016-March 2017

Appendix – Market Size and Forecast

Forecast methodology

Figure 31: Best- and worst-case forecasts for the total UK seasonings and stocks market, by value, 2016-21

Figure 32: Best- and worst-case forecasts for the total UK seasonings market, by value, 2016-21

Figure 33: Best- and worst-case forecasts for the total UK stocks market, by value, 2016-21

Appendix – Market Share

Figure 34: Leading manufacturers' value sales and shares in UK retail seasonings market, 2014-16

Figure 35: Leading manufacturers' value sales and shares in UK retail stocks market, 2014-16

Appendix – Advertising and Marketing Activity

Figure 36: Total above-the-line, online display and direct mail advertising expenditure on seasonings and stocks, by media type, 2013-16

Figure 37: Recorded above-the-line, online display and direct mail total advertising expenditure on seasonings and stocks, by highest-spending advertisers, 2013-16

Appendix – The Consumer

Figure 38: Repertoire of usage of seasonings, March 2017

Figure 39: Repertoire of usage of stocks, March 2017

Figure 40: Seasonings and stocks – CHAID – Table output, March 2017

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com