

Condiments and Seasonings - Canada - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



While consumers' tastes are evolving, familiarity remains the most important consideration for Canadians when deciding on what condiments and/or seasonings to use. This represents a potential challenge for companies that operate in the category.

This report looks at the following areas:

- **Canadians look to what's familiar when choosing condiments and seasonings**
- **Innovation around health holds less appeal among older Canadians**

Is there room to innovate and yield a return on investments that are made when consumers appear to place greater importance on what is familiar to them rather than what is new? Considering factors around potential cannibalization (eg with different types of barbecue sauce for instance), is innovation in the space worth the investment and does it generate returns? This Report will identify areas of innovation that appear more and less likely to resonate with Canadians to help with making consumer-centric decisions around innovation. This Report also discusses other considerations that are important to consumers such as health and nutrition, demands for all-natural ingredients and convenience, and also identifies population segments for whom these considerations matter more or less. The ultimate aim of this Report is to provide fact-based analysis and perspective reliant on quantitative and qualitative research, product examples from within and outside of Canada, and industry observations.

**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

Condiments and Seasonings - Canada - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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
Definition
Condiments
Seasonings
Market Sizing – Table Sauces

Executive Summary

The issues
Canadians look to what's familiar when choosing condiments and seasonings
Figure 1: Considerations important to consumers when choosing condiments and/or seasonings, January 2018
Innovation around health holds less appeal among older Canadians
Figure 2: Interest in condiments and/or seasoning with "added benefits" or "ingredient alternatives", January 2018
The opportunities
Canadians appear open to seasonings with health benefits
Figure 3: Agree "Seasonings can help make dishes healthier without sacrificing flavour", by gender and parental status, January 2018
Canadians want both guidance and the ability to personalize
Figure 4: Attitudes towards condiments and seasonings (% agree), January 2018
Nearly half of Canadians would pay more for premium condiments
Figure 5: Attitudes towards condiments and seasonings (% agree), January 2018
Demand for "all-natural" condiments and seasonings persists
Figure 6: Importance of "all-natural" when choosing condiments and/or seasonings, January 2018
What it means

The Market – What You Need to Know

Table sauces show modest upward trajectory
Immigration fuelling Canada's population growth
Health concerns held by older Canadians are not necessarily an invitation to innovation

Market Size and Forecast

Table sauces show modest upward trajectory
Figure 7: Total Canadian retail value sales and forecast of table sauces, at current prices, 2012-22
Figure 8: Total Canadian retail value sales and forecast of table sauces, at current prices, 2012-22
Figure 9: Total Canadian retail volume sales and forecast of table sauce, 2012-22

Market Factors

Immigration fuelling Canada's population growth
Figure 10: Foreign-born share of population by G8 country and Australia
Health concerns held by older Canadians are not necessarily an invitation to innovation
Figure 11: Population aged 65 years and over in Canada, historical and projected (% of total), 1971-2061

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

Condiments and Seasonings - Canada - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Canadians are more time-pressed

Cooking from scratch remains foundational for seasonings and condiments

Figure 12: Weekly food preparation habits, May 2016

Key Players – What You Need to Know

Kraft Heinz remains the market leader in table sauces

Sodium concerns Canadians, but other seasonings can offer a solution

Canadians look to “spice up their life”

Company Share of Market

Kraft Heinz remains the market leader in table sauces

Figure 13: Share of Canadian retail value sales of table sauce, by company, 2017

What’s Working?

Opportunity to support margin through premiumization

Figure 14: Sam’s Choice Chardonnay & Honey Mustard (US), October 2017

Figure 15: Co-Op Gold Pure Maple Mustard & Craft Beer BBQ Sauce (Canada), July 2017

Figure 16: Urban Accents Wine & Cider Mulling Spices Blend (Canada), November 2017

Potential Challenges

Commoditized consumer packaged goods category poses a challenge

French’s promotes the use of Canadian ingredients, but will consumers respond?

Sodium concerns Canadians, but other seasonings can offer a solution

What’s Next?

Regional positioning can add to international foods’ and flavours’ authenticity

Figure 17: Santa Maria Street Food Kingston Style Jamaican Jerk Spices for Tacos (Canada), November 2017

Canadians look to “spice up their life”

Figure 18: Pumpkin Chipotle Spicy Rub (US), December 2017

Figure 19: Williams-Sonoma Chile Garlic Kimchi Korean Rub (US), March 2018

Figure 20: Private Selection Shichimi Togarashi Seasoning (US), January 2018

Figure 21: Good Food for Good Organic Spicy Ketchup Style Sauce (Canada), July 2017

Figure 22: Co-Op Gold Pure Spicy Apple Cider Vinegar BBQ Sauce (Canada), July 2017

Convenient meal solutions will remain an important opportunity

Figure 23: Crush Cubes Crush Food Service (US), August 2016

The Consumer – What You Need to Know

Condiments and seasonings are great ‘supporting actors’

Health-related considerations matter to a third of consumers

Nearly half of Canadians are willing to pay more for “quality”

Ketchup remains the king of condiments

Salt and pepper remain as an overwhelming go-to for Canadians

Reasons for Using Condiments and/or 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

Condiments and Seasonings - Canada - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Condiments and seasonings are great 'supporting actors'

Two thirds of consumers want to "infuse" new flavours into what they eat

Figure 24: Agree "I would like more ideas for infusing new flavours into my meals", by age, January 2018

Canadians like to explore new flavours, but also appreciate familiarity

Figure 25: Importance of familiar and new flavours when deciding what condiments and seasonings to use, by age, January 2018

Figure 26: Desève Grande Coulée Organic Maple Syrup (Canada), June 2016

Aside from taste, condiments and seasons offer convenience

Figure 27: Importance of recipe usage/suggestions when deciding what condiments and seasonings to use, January 2018

Figure 28: Interest in recipe-inspired combinations for one meal, by parental status, January 2018

What Matters to Consumers

Health-related considerations matter to a third of consumers

Figure 29: Considerations important to consumers when choosing condiments and/or seasonings, January 2018

Figure 30: Top nutritional mentions on table sauce and seasoning launches in Canada, 2017

Consumers express demand for "clean" labels

Figure 31: Importance of all-natural ingredients, by parental status, January 2018

Half of Canadians place value in brand equity

Figure 32: President's Choice Blue Menu Low Sodium Ketchup Style Sauce (Canada), November 2017

Figure 33: Heinz Sriracha Ketchup Style Sauce (Canada), March 2016

Growth Opportunities

Trial size and flavour boosters can help maximize reach

Figure 34: TURF Analysis – Interest In condiments and/or seasonings, January 2018

Consumers are looking for personalized options

Figure 35: Agree "I prefer to mix them together to create my own flavours", by age, parental status and parental type, January 2018

Desire for customization does not negate the demand for convenience

Figure 36: Bang Curry Barishal Bang Spice Kit (UK), October 2017

Figure 37: Passage Foods Street Kitchen Asian Japanese Teriyaki Chicken (UK), March 2018

Nearly half of Canadians are willing to pay more for "quality"

Figure 38: Agree "I would pay more for premium condiments", by age and gender, January 2018

Figure 39: Montosco Le Eccellenze del Gusto Condiments Set for Meat (Italy), February 2017

Figure 40: La Barberie Microbrasserie Beer Mustard (Canada), July 2016

Figure 41: Au Pied de Cochon Martin Baseball Smoked Maple Mustard (Canada), March 2017

Figure 42: Maull's Onion Bits St. Louis Style BBQ Sauce (US), April 2016

Breakfast represents a growth opportunity

Figure 43: McCormick Good Morning Peaches & Cream Baked Oatmeal Slow Cooker Breakfast Seasoning Mix (US), December 2017

Figure 44: McCormick Good Morning Apple Cinnamon French Toast Slow Cooker Breakfast Seasoning Mix (US), December 2017

Figure 45: McCormick Good Morning Mexican Egg Casserole Slow Cooker Breakfast Seasoning Mix (US), December 2017

Condiment and Seasonings Usage

Ketchup remains the king of condiments

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

Condiments and Seasonings - Canada - April 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 46: Condiments usage, January 2018

Figure 47: Appealing flavours in sauces and marinades, September 2017

Figure 48: Condiments usage, by gender, January 2018

Figure 49: Condiments usage, by age, January 2018

Salt and pepper remain as an overwhelming go-to for Canadians

Figure 50: Seasoning usage, January 2018

Figure 51: Seasoning usage, by gender, January 2018

Figure 52: Seasoning usage (select), by age, January 2018

Consumer Groups

Parents can use a helping hand

Figure 53: Condiments and/or seasonings consumers are interested in trying (select), by parental status, January 2018

Figure 54: Condiments and/or seasonings consumers are interested in trying, by parental status, January 2018

Regional differences can impact positioning

Figure 55: Condiments usage, Quebec vs Canada overall, January 2018

Figure 56: Important factors when choosing condiments and/or seasonings, BC vs Canada overall, January 2018

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Consumer qualitative research

TURF Analysis

Abbreviations and terms

Abbreviations

**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