

Cooking Sauces and Pasta Sauces: Inc Impact of COVID-19 - UK - December 2020

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- The impact of COVID-19 on the cooking and pasta sauces retail market.
- Launch activity in 2020 and future product development opportunities.
- Factors influencing choice of cooking and pasta sauces.
- Reasons to pay more for cooking and pasta sauces.
- Consumer behaviours and attitudes related to cooking and pasta sauces.

That low price is the top factor influencing shoppers' choice when buying cooking and pasta sauces signals a warning to the market in light of the financial pressures facing households in 2021. However, it's only a consideration for 50% of buyers, clearly indicating that brands can look to competitive levers beyond price to stand out.

The restrictions and lockdowns enacted to combat the spread of COVID-19 in 2020 have provided a boost to cooking and pasta sauces. Beyond these, the category has benefited from the edict to work from home, a reluctance to visit foodservice venues and people tightening their purse strings. The new wave of lockdowns starting in January 2021 will have a similar effect to the previous periods of heightened restrictions, while the expected shift towards more homeworking long term will keep up sauce occasions going forward, providing a boost to the lunchtime occasion.

This has resulted in a boost to home cooking, benefiting cooking/pasta sauces. That shop-bought sauces are part of most scratch cooks' repertoires highlights potential for manufacturers to convince these consumers to switch to more convenient cooking sauces more often, but also the threat they face as the pandemic has seen many people improve their cooking skills.

With finances under pressure going into 2021 and people likely to remain hesitant about mixing in enclosed spaces, this will continue to curb dining out even once restrictions are eased. This presents opportunities for food sold at retail, including cooking sauces, to position itself as an alternative to a meal at



"The restrictions and lockdowns enacted to combat the spread of COVID-19 in 2020 have provided a boost to cooking and pasta sauces. The category has benefited from the edict to work from home, a reluctance to visit foodservice venues and people tightening their purse strings."

– Amy Price, Senior Food & Drink Analyst

Buy this report now

Visit	store.mintel.com
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



Report Price: £2195 | \$2995 | €2600

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

a restaurant. This is particularly applicable to premium sauces, with 64% of users/buyers agreeing that a home-made meal made using a premium cooking/pasta sauce is a good alternative to a meal at a restaurant.

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £2195 | \$2995 | €2600

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Impact of the January lockdowns and the vaccination rollout
- Economic and other assumptions
- Products covered in this Report
- Excluded from this Report

EXECUTIVE SUMMARY

- **Impact of COVID-19 on cooking/pasta sauces**
Figure 1: Short-, medium- and long-term impact of COVID-19 on cooking/pasta sauces, 12 January 2020
- **The market**
- **Cooking/pasta sauces boosted in 2020**
Figure 2: UK retail sales of cooking and pasta sauces, 2015-25 (prepared on 9 December 2020)
- **All segments see growth in 2020**
Figure 3: UK retail sales of cooking/pasta sauces, by segment, 2018-20
- **Spending under pressure as pandemic hits, EU trade deal avoids tariffs**
- **Ageing population and drop in the young threaten the market**
- **Companies and brands**
- **Dolmio retains lead; own-label outperforms the market**
Figure 4: Leading brands' value shares in the UK retail ambient cooking and pasta sauces and marinades market, 2019/20*
- **Dolmio moves into plant-based sauces; Napolina moves into frozen**
- **Sauce makers look to world cuisines for flavour innovation**
- **Adspend increases in 2020 with Dolmio leading spend**
- **Dolmio is seen most strongly as a family brand; Loyd Grossman leads on exclusivity**
Figure 5: Attitudes towards and usage of selected brands, November 2020
- **The consumer**
- **85% use cooking/pasta sauces, with non-chilled the most popular**
Figure 6: Types of cooking/pasta sauces used in the last three months, September 2020

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £2195 | \$2995 | €2600

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

- **Low price is the number one factor influencing purchasing**
Figure 7: Factors influencing choice, September 2020
- **Untapped interest in innovative flavours**
Figure 8: Reasons to pay more for a cooking/pasta sauce, September 2020
- **Users are habitual in their choice of sauces**
Figure 9: Behaviours relating to cooking/pasta sauces, September 2020
- **Consumers call for healthier sauces**
Figure 10: Attitudes towards cooking/pasta sauces, September 2020

ISSUES AND INSIGHTS

- **Consumers call for healthier sauces**
- **Premium sauces should look to recreate the restaurant experience in the home**
- **Meat reduction trend poses an opportunity for diversification in sauces**
- **Untapped interest in innovative flavours**

THE MARKET – KEY TAKEAWAYS

- **Cooking/pasta sauces boosted in 2020 due to COVID-19**
- **Income squeeze will affect sales going forward**
- **All segments see growth in 2020**
- **Spending under pressure as pandemic hits**
- **Ageing population and drop in the young threaten the market**

MARKET SIZE AND FORECAST

- **Impact of COVID-19 on cooking/pasta sauces**
Figure 11: Short-, medium- and long-term impact of COVID-19 on cooking/pasta sauces, 12 January 2020
- **Cooking/pasta sauces boosted in 2020**
Figure 12: UK retail sales of cooking and pasta sauces, 2015-25 (prepared on 9 December 2020)
- **Income squeeze will affect sales going forward**
- **The impact of Britain’s EU departure**
- **Rise in home cooking benefits sauces**
- **Population changes threaten the market**
Figure 13: UK retail sales of cooking and pasta sauces, 2015-25 (prepared on 9 December 2020)
- **Market drivers and assumptions**
Figure 14: Key drivers affecting Mintel’s market forecast, 2015-25 (prepared on 11 December 2020)

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



Report Price: £2195 | \$2995 | €2600

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

- **Learnings from the last recession**
Figure 15: UK retail value sales of cooking/pasta sauces, 2008-12
- **Forecast methodology**

MARKET SEGMENTATION

- **All segments see growth in 2020**
Figure 16: UK retail sales of cooking/pasta sauces, by segment, 2018-20
- **Italian sauces remain the most popular**
Figure 17: UK retail sales of ambient wet and dry cooking and pasta sauces, by cuisine, 2018-20

MARKET DRIVERS

- **Impact of the January 2021 lockdown**
- **Health is an issue**
- **Anti-obesity push could hit cooking and pasta sauces**
- **Incomes under pressure as pandemic hits the economy**
- **Unemployment rises and real incomes fall**
Figure 18: Annual percentage change in CPI and AWE (regular pay), monthly basis, January 2015–September 2020
- **Affordable status of cooking/pasta sauces should support demand, limited impact from Britain’s EU departure**
- **Ageing population and drop in the young threaten the market**
Figure 19: Trends in the age structure of the UK population, 2015-20 and 2020-25

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Dolmio retains lead; own-label outperforms the market**
- **Dolmio moves into plant-based sauces; Napolina moves into frozen**
- **Sauce makers look to world cuisines for flavour innovation**
- **Adspend increases in 2020 with Dolmio leading spend**
- **Dolmio is seen most strongly as a family brand; Loyd Grossman leads on exclusivity**

MARKET SHARE

- **Dolmio retains lead; Sharwood’s sees fastest growth**
- **Own-label outperforms the market**
Figure 20: Leading brands’ value sales and shares in the UK retail ambient cooking and pasta sauces and marinades market, 2018/19 and 2019/20
- **Own-label continues dominance of chilled sauces**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £2195 | \$2995 | €2600

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

Figure 21: Leading brands' value sales and shares in the UK retail chilled sauces market, 2018/19 and 2019/20

LAUNCH ACTIVITY AND INNOVATION

- Brands step up NPD**
 Figure 22: Share of new product launches in the cooking/pasta sauces market, by own-label vs branded, 2016-20
- Tesco leads NPD in 2020, expanding its Wicked Kitchen range and focusing on world cuisines**
 Figure 23: Share of new product launches in the cooking/pasta sauces market, by top 10 companies, 2016-20
 Figure 24: Tesco targets different cuisines with sauces NPD, 2020
- Dolmio moves into plant-based sauces...**
 Figure 25: Brands and own-labels tap into the plant-based/vegan trend, 2020
- ...and launches Stand Against Hunger**
- Napolina moves into frozen with sauce and pasta range**
- ...following rebrand**
 Figure 26: Napolina moves into frozen sauces and rebrands, 2020
- Minority of sauces carry low/no/reduced fat/sugar/salt claims**
 Figure 27: New product launches in the UK cooking/pasta sauces market, by the selected low/no/reduced claims, 2016-20
- Positive claims can appeal**
 Figure 28: NPD with a blood pressure/cholesterol claim, 2019
- Significant interest in gut health**
- Sauce makers continue to look to world cuisines for flavour innovation**
- Less familiar Asian cuisines feature in 2020 launches**
- Cooking sauces that are hard to cook at home hold wide appeal**
 Figure 29: Sauces featuring new flavours, 2020
- Mild flavours could appeal to families**
 Figure 30: Sauces with mild flavours, 2019
- Launches continue to emphasise provenance to denote quality**
- Recent launches reference regional provenance and craft cues**
 Figure 31: Sauces that are made in Italy or handmade, 2019-20

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £2195 | \$2995 | €2600

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

- **Convenience is a selling point for sauces**
Figure 32: Launches that highlight convenience, 2020
- **Homepride launches sauces for slow cooker**
Figure 33: Sauces that are suitable for a slow cooker/that have been slow cooked, 2020
- **Few sauce makers look to cater to environmental concerns beyond recycling**
- **Pouches come under fire**
Figure 34: Loyd Grossman details recycling commitment on NPD, 2020

ADVERTISING AND MARKETING ACTIVITY

- **Adspend increases in 2020**
Figure 35: Total above-the line, online display and direct mail advertising expenditure^ on cooking and pasta sauces, by month, 2019-20
- **Mars is the top advertiser, supporting its Dolmio range**
- **Stand Against Hunger campaign**
Figure 36: Total above-the line, online display and direct mail advertising expenditure on cooking and pasta sauces, by top advertisers, 2019/20 (sorted by 2020)
- **Nielsen Ad Intel coverage**

BRAND RESEARCH

- **Brand map**
Figure 37: Attitudes towards and usage of selected brands, November 2020
- **Key brand metrics**
Figure 38: Key metrics for selected brands, November 2020
- **Brand attitudes: Dolmio is seen to offer good value**
Figure 39: Attitudes, by brand, November 2020
- **Brand personality: Loyd Grossman stands out on exclusivity**
Figure 40: Brand personality – macro image, November 2020
- **Dolmio is seen as a family brand**
Figure 41: Brand personality – micro image, November 2020
- **Brand analysis**
- **Colman’s is seen to be the joint most trusted brand**
Figure 42: User profile of Colman’s, November 2020
- **Patak’s is seen to be the most authentic brand**
Figure 43: User profile of Patak’s, November 2020
- **Dolmio is the most popular brand**
Figure 44: User profile of Dolmio, November 2020

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £2195 | \$2995 | €2600

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

- **Schwartz is seen to be the joint most innovative**
Figure 45: User profile of Schwartz, November 2020
- **Sharwood’s is seen to be delicious**
Figure 46: User profile of Sharwood’s, November 2020
- **Saclà is the least widely used brand**
Figure 47: User profile of Saclà, November 2020
- **Loyd Grossman leads on indulgence and exclusivity**
Figure 48: User profile of Loyd Grossman, November 2020

THE CONSUMER – KEY TAKEAWAYS

- **Rise in home cooking supports cooking sauces**
- **Price will remain important as incomes are squeezed; evenings in hold ongoing potential**
- **Untapped interest in innovative flavours**
- **Consumers call for healthier sauces**

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Health becomes more of a priority in the wake of the pandemic**
Figure 49: Those who say eating healthily is a higher priority as a result of the coronavirus outbreak, by gender and age, 2-11 November 2020
- **Rise in home cooking supports cooking sauces**
- **Price will remain important as incomes are squeezed; evenings in hold ongoing potential**
- **Environmental concerns have not gone away**

USAGE OF COOKING/PASTA SAUCES BY TYPE

- **85% use cooking/pasta sauces, with non-chilled the most popular**
- **Scratch cooking poses competition**
Figure 50: Types of cooking/pasta sauces used in the last three months, September 2020
- **Only a minority use any individual type of cooking/pasta sauces weekly**
Figure 51: Frequency of using different types of cooking/pasta sauces, September 2020
- **A minority have a wide repertoire of sauce types**
Figure 52: Repertoire of usage of different types of cooking/pasta sauces, September 2020

PURCHASING OF COOKING/PASTA SAUCES IN THE COVID-19 PANDEMIC

- **COVID-19 pandemic provides a boost to purchasing**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Report Price: £2195 | \$2995 | €2600

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

Figure 53: Purchasing of cooking/pasta sauces since the start of the COVID-19 outbreak, September 2020

Figure 54: Napolina pasta's on-pack promotion for the brand's pasta sauces, November 2020

FACTORS INFLUENCING CHOICE

- **Low price is the number one factor influencing purchasing**
Figure 55: Factors influencing choice, September 2020
- **Healthier versions appeal to a third**
- **Opportunities for positive claims**
- **Recyclable packaging ranks low despite environmental awareness**

REASONS TO PAY MORE

- **Untapped interest in innovative flavours**
- **Recognising family appeal of sauces**
Figure 56: Reasons to pay more for a cooking/pasta sauce, September 2020
- **Tradition and provenance can help products to charge more**
- **Opportunities for recipes by chefs**

COOKING/PASTA SAUCES BEHAVIOURS

- **Users are habitual in their choice of sauces**
- **Pushing new but familiar dishes**
- **Emerging cuisines offer a way to push trial**
Figure 57: Behaviours relating to cooking/pasta sauces, September 2020
- **Recipe kits pose potential for sauce brands**

ATTITUDES TOWARDS COOKING/PASTA SAUCES

- **Consumers call for healthier sauces**
Figure 58: Attitudes towards cooking/pasta sauces, September 2020
- **Adding vegetables to improve nutrition**
- **Gut health is underexplored in sauces**
- **Premium sauces should look to recreate the restaurant experience in the home**
- **Home-cooked meals can compete with takeaways**
- **Meat reduction trend poses an opportunity for diversification in sauces**
- **Chilled versions would find favour with young people in the ABC1 group**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £2195 | \$2995 | €2600

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

Figure 59: Agreement with the statement “Sauces well-suited for meat alternatives are appealing” – CHAID – tree output, September 2020

QUALITIES ASSOCIATED WITH COOKING/PASTA SAUCES

- **Homemade versions are seen to be healthiest**
- **Shop-bought sauces stand out on convenience and versatility**

Figure 60: Correspondence analysis: qualities associated with chilled, non-chilled and home-made cooking and pasta sauces, September 2020

Figure 61: Qualities associated with chilled, non-chilled and home-made cooking and pasta sauces, September 2020

- **Methodology**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**
- **CHAID Methodology**

Figure 62: Cooking sauces and pasta sauces – CHAID – table output, September 2020

APPENDIX – MARKET DRIVERS

Figure 63: Trends in body mass index (BMI), England, 1995-2018

Figure 64: Trends in how respondents would describe their financial situation, January 2018–November 2020

APPENDIX – MARKET SHARE

Figure 65: Leading manufacturers’ value sales and shares in the UK retail ambient cooking and pasta sauces and marinades market, 2018/19 and 2019/20

APPENDIX – LAUNCH ACTIVITY AND INNOVATION

Figure 66: New product launches in the UK cooking/pasta sauces market, by brand, 2016-20

Figure 67: New product launches in the UK cooking/pasta sauces market, by flavour component, 2016-20

Figure 68: New product launches in the UK cooking/pasta sauces market, by package type, 2016-20

Figure 69: New product launches in the UK cooking/pasta sauces market, by claim category, 2016-20

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



Report Price: £2195 | \$2995 | €2600

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

Figure 70: New product launches in the UK cooking/pasta sauces market, by top 10 claims, 2016-20

APPENDIX – ADVERTISING AND MARKETING ACTIVITY

Figure 71: New product launches in the UK cooking/pasta sauces market, by claim category, 2016-20

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.