

The Grocer

Focus On: Cooking Sauces by Natalie Brown (Natalie_Brown@live.co.uk)

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The Story

- **The market for traditional, jarred, pour-over meat/fish/pasta cooking sauces is going off the boil. Overall cooking sauce sales might have only dipped slightly in the past year, but this masks a much steeper decline in traditional sauces. So where is the growth in this market? What's driving it? Where are the biggest declines? And what can be done to turn things around?**

Key themes:

Formats and packaging: Central to this feature will be an exploration of new packaging and product formats and how these are shaping the cooking sauces market. The feature will investigate what impact cooking pastes, pouched sauces and packs containing multiple ingredients to appeal to the sensibilities of budding home chefs are having on the market.

Different cuisines: Italian is holding its own, just, while Oriental and Tex Mex are in decline. This feature will explore in detail the factors that are leading to differing fortunes of different kinds of cuisines and investigate how brands and retailers are affecting sales. Particular attention will be paid to the impact meal kits and scratch cooking are having on different kinds of cuisines. What will be the next big cuisine?

The discounters: The big four are getting hammered in cooking sauces as the discounters compete hard, particularly at the more value end of the market. So how are they using brands and their own label ranges to compete? Is it all about competing on price or can retailers leverage the power of the brands they stock to win back share?

Own label: Own label is significantly outgrowing brands in the cooking sauces market. This feature will investigate the factors that are leading to this, including NPD, price, promotions and the growth of the discounters, which are generally more reliant on own label than the mainstream multiples.

Price and promotions: This feature will explore how the promotional strategies of retailers and brands looking have changed over the past year. Particular attention will be paid to how prices have changed following the start of the price war and ask whether retailers have been forced to lower prices in order to avoid losing more share to the discounters.

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Innovation: This will be key to this feature. We will be investigating how successful the raft of innovation last year has been in driving growth and value back into the category. What innovation will we be seeing in 2015?

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?