

MARKET INNOVATION OVERVIEW

CATEGORY: Sauces & Seasonings | **COUNTRY:** Canada

Este documento foi elaborado no âmbito do projeto PortugalFoods Qualifica, com o objetivo de criar informação de alto valor acrescentado para as PME e restantes entidades do setor agroalimentar nacional, para que estas se possam posicionar estrategicamente no contexto do mercado global.

A informação contida neste documento provém do Observatório da PortugalFoods que, com recurso à plataforma Mintel, permite contribuir para a qualificação e sensibilização do setor agroalimentar, tanto ao nível do conhecimento sobre novos produtos e técnicas de produção, como ao nível do acompanhamento da evolução tecnológica e da evolução das preferências do consumidor.

A Mintel cataloga mais de 38 000 novos lançamentos de produto por mês, provenientes dos 86 mercados que monitoriza, analisando e categorizando todos os seus atributos, tais como os ingredientes, posicionamento e comunicação ao consumidor.

O Observatório da PortugalFoods constitui-se assim como uma ferramenta de grande importância para alicerçar o conhecimento das empresas do Setor Agroalimentar.

A REGIONAL INTRODUCTION:

SAUCES & SEASONINGS IN THE AMERICAS

From ethnic to regional: Continued interest in flavours inspired by ethnic cuisine has paved the way for more regional-specific varieties. Cooking sauces based on regional recipes not only come with a stamp of authenticity but also bring something new to the table in terms of flavours.

Harness seasonal potential: Innovation in seasonal-inspired cooking sauces is currently limited. Brands could look to create new opportunities by formulating with seasonal ingredients to keep consumers engaged all year round.

Aim for complex flavour profiles: There is room to innovate more creatively around flavour profiles. For example, botanicals are being explored to enhance complex taste experiences and subtly complement existing flavour profiles.

Encourage more experimental use of sauces: Positioning table sauces as 'multipurpose solutions' can inspire consumers to use them in new and imaginative ways, and with a wide variety of foods. However, brands will need to be proactive in offering ideas about certain meals they can be used with.



SAUCES & SEASONINGS IN CANADA

Market Overview

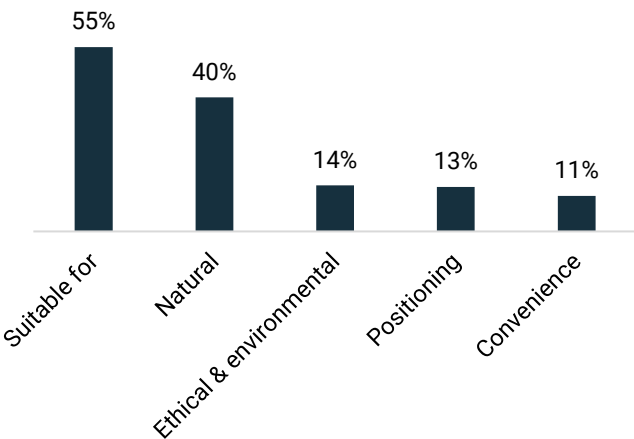
The Canadian sauces and seasonings sector is expected to grow from €2.51 billion in 2018 to €3.02 billion by 2023, at a CAGR of 3.7%. In volume terms, the sector is expected to grow from 447.4 million kg in 2018 to 465.0 million kg by 2023, registering a CAGR of 0.8%.

Per capita consumption of sauces and seasonings in Canada stood at 12.1kg in 2018 and is expected to decrease to 11.9kg by 2023. Per capita expenditure in Canada stood at €67.5 in 2018 and is expected to grow and reach €77.2 by 2023. (GlobalData, 2020)

New Product Development Analysis

14% of food products launched in Canada in 2019 were Sauces & Seasonings.

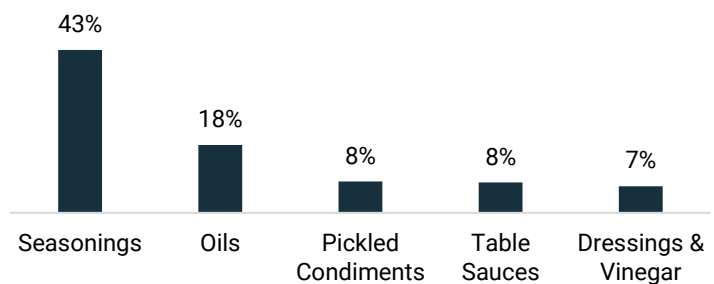
Top 5 Claim Categories in Sauces & Seasonings product launches, 2019



The top claim (in terms of new product launches in 2019) in the Canadian sauces & seasonings sector was the 'Kosher' claim, featured in 40% of products. One in four products were 'Gluten Free', and one in five were 'Organic' certified.

The 'Seasonings' sub-category saw more than 40% of the new product launches in 2019. The 'Oils' sub-category was responsible for 18% of launches.

Top 5 Sub-Categories of Sauces & Seasonings product launches, 2019



This USDA organic and kosher certified product is free from gluten and retails in a 70g pack featuring the EcoCert logo.



This first-pressed product is made with lightly toasted hazelnuts, is free from gluten and GMO.



This premium quality and organic certified product is a source of fibre and free from gluten.



THE CANADIAN CONSUMER

27% of Canadian fruit/vegetable buyers are interested in **sauces that enhance the flavours of vegetables or fruit** (2017)



45% of Canadian sauce/marinade users say that they are **interested in sauces/marinades that feature regional flavours, including those from across Canada's provinces** (2017)



47% say they are **looking for sauces and marinades that allow them to customize the flavours of their foods** (2017)

(GlobalData, 2020)

A GLOBAL LOOK INTO THE FUTURE

From mayos to mustards: In the past few years, mayonnaise has expanded into new occasions, flavours and cuisines. However, mustard is seen as traditional and only a condiment used by older generations. Mustard brands should modernise and explore new flavour combinations to attract a younger consumer.

Plant-based sauces offer more potential: Many brands are already exploring the potential in plant-based sauces, with substitutes for everyday sauces now common on supermarket shelves. There is still plenty of room for innovation, both by building up a wider repertoire of plant-based sauces for specialist cuisines or particular occasions, such as BBQ, and also by looking at the relatively unexplored potential in sauces created specifically to complement the unique physical qualities of plant proteins.

Frozen sauce cubes deliver convenience without waste: Frozen sauces, in the form of individually portioned cubes, can deliver convenience with less waste than larger formats and can naturally lock in flavor to create a fresh-feeling product that can challenge chilled.

Para mais informações acerca do Observatório da PortugalFoods, por favor contactar knowledge.division@portugalfoods.org

