

MARKET INNOVATION OVERVIEW

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

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 EUROPE, MIDDLE EAST AND AFRICA

Cater to specific dietary needs: Cooking sauce and seasoning brands should seek to cater to various diets (eg 'vegan', 'raw' and 'FODMAP') to maximise their appeal and achieve stand-out in an otherwise fragmented market.

Provide flavoursome vegan sauces: Consumers are cutting back on their meat consumption, prompting cooking sauce brands to launch vegan-friendly recipes that offer full and indulgent flavours.

Ripe opportunities in pesto sauces: Pesto sauces are enjoying growth with brands exploring new base ingredients, flavours, packaging formats and even new demographics (eg children) to drive further sales in the category.

Cater to vegan diet followers: Table sauces and condiments that are positioned as suitable for vegans are likely to gain a wider traction in Europe, as more consumers are cutting back on their meat intake and will seek the assurance of a vegan claim. There are opportunities to emphasise the use of plant-based ingredients to appeal to vegan diet followers.



SAUCES & SEASONINGS IN BELGIUM

Market Overview

The Belgian sauces and seasonings sector is expected to grow from €607.4 million in 2019 to €743.4 million by 2024, at a CAGR of 4.1%. In volume terms, the sector is expected to grow from 92.4 million kg in 2019 to 107.9 million kg by 2024, registering a CAGR of 3.2%.

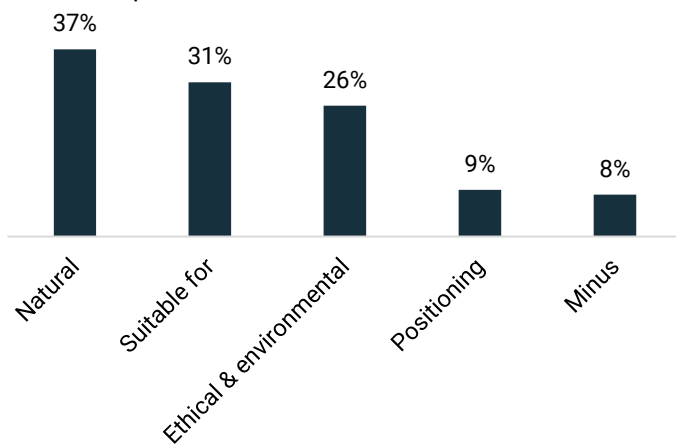
Per capita consumption of sauces and seasonings in Belgium stood at 8.2kg in 2019 and is expected to grow and reach 9.2kg by 2024. Per capita expenditure in Belgium stood at €52.6 in 2019 and is expected to reach €63.0 by 2024. (GlobalData, 2020)

New Product Development Analysis

8%

of food products launched in Belgium between July 2019 and June 2020 were Sauces & Seasonings.

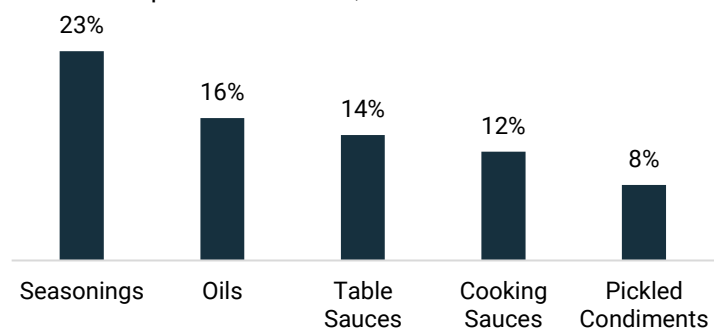
Top 5 Claim Categories in Sauces & Seasonings product launches, Jul2019-Jun2020



The sauces and seasonings launched in Belgium featured 'Natural' claims the most, like the 'Organic' claim. From the 'Suitable for' category, the 'Vegan' claim was the most used. The 'Eco-friendly Package', from the 'Ethical & environmental', was the top claim overall.

The most active sub-category, in terms of new product launches, was the 'Seasonings' sub-category, with almost a quarter of the products. 'Oils' registered a share of 16%, with 'Table Sauces' following closely.

Top 5 Sub-Categories in Sauces & Seasonings product launches, Jul2019-Jun2020



This finely chopped product retails in a 50g pack, bearing the EU Green Leaf logo.



This vegan product is suitable for cold and hot dishes and retails in a 1L pack featuring the V-Label seal.



This product is made with mustard seeds from a sustainable farming and retails in a recyclable pack.



THE BELGIAN CONSUMER

The usual average consumption of sauces for 3-64 year olds is

27 g per day



Men and young adults (18-39 years old) consume larger quantities of sauces



Source: Belgian National Food Consumption Survey 2014 (<https://fcs.wiv-isp.be>)

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

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