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Consumer Trends

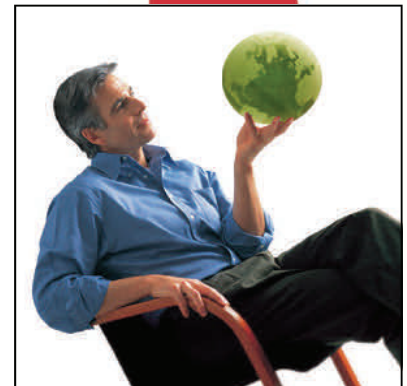
Sauces, Dressings and Condiments in Germany



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Consumer Trends

Sauces, Dressings and Condiments in Germany



▶ MARKET SNAPSHOT

- ▶ Germany has the largest population among the 27 European Union (EU) member countries, with an estimated total population of 81.8 million, as of January 2011. Despite the largest total population, Germany has experienced decreasing population growth since 2006, with the lowest birth rate in the EU-27, at 8.1 births per thousand inhabitants (Euromonitor, 2012).
- ▶ Germany also has the largest economy by total gross domestic product (GDP) within the EU-27, at US\$3.57 trillion in 2011, with US\$43,689 annual per capita GDP (World Bank, 2012). The country's economy was affected by the global economic slowdown in 2008-2009. However, it has been recovering quickly. In addition, consumers gained confidence as their personal finances indicated positive prospects, regardless of the euro crisis (Euromonitor, 2012).
- ▶ The total sauces, dressings and condiments market in Germany experienced slow growth, with a compound annual growth rate (CAGR) of 2.9% in value terms, and 1.8% by volume over the 2006-2011 period. Dips and pickled condiments recorded the highest growth rate during the 2006-2011 period, both by value and volume terms, and are expected to further expand at a higher rate than most other categories during the 2011-2016 period.
- ▶ According to Euromonitor (2012), an increasing number of German households are cooking at home using time-saving options. For example, rather than making pasta sauce from scratch, German consumers choose ready-made pasta sauces or alternative products to "jazz up" their dishes. In addition, the sales of sauces, seasonings and condiments depend on seasonality. Specifically, during the summer months, barbeque-related products, such as table sauces, are sold more often than during other seasons.
- ▶ From January 2006 to July 2012, there were numerous new products introduced in the German sauces, dressings and condiments market, including new products with diverse blends of flavours. In terms of sales, cream-based wet cooking sauces, including Hollandaise, Béarnaise, and Béchamel, performed well, with 37% (estimate) of retail value sales in the sauces category in 2011. Curry sauces also performed well, accounting for an 18% (estimate) share of the sauces market in 2011. The key marketing words for 2011 were 'low calorie' and 'made with organic produce.' However, due to the intense competition in this fragmented market, pricing was often used as a major marketing tool.

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Source: Shutterstock



▶ RETAIL SALES

Retail Sales Overview

- ▶ The total value sales of sauces, dressings and condiments in Germany reached US\$4.4 billion in 2011, with a CAGR of 2.9% during the 2006-2011 period. Volume sales for these categories totalled 943,400 tonnes in 2011, up by just 0.4% from 2010. Volume sales growth gradually decreased since the peak growth of 3.5% during the 2006-2007 period, maintaining a CAGR of 1.8% during the 2006-2011 period.
- ▶ In value terms, cooking sauces were the largest market during the 2006-2011 period, with US\$2 billion in sales, accounting for 48.4% of the total market in 2011. Within this category, herbs and spices were the largest sub-category, with a value of US\$701 million. The second largest market was table sauces, with US\$1.3 billion in sales, representing 30.7% of the total market. However, table sauces have experienced a decrease in market share since 2006.
- ▶ Since 2008, volume sales of pickled condiments have outperformed table sauces, which were traditionally the largest market by volume sales. Accordingly, pickled products showed an increase in value sales, registering total sales of US\$729 million in 2011, at a CAGR of 7.4% during the 2006-2011 period. Both by value and volume sales, dips were the fastest growing category, with a CAGR of 10.3% from 2006-2011, with US\$111 million in sales in 2011.

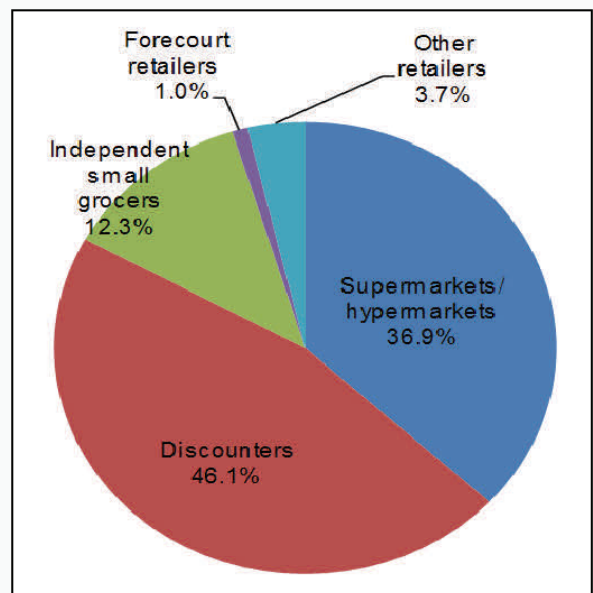
Retail Sales Forecasts

- ▶ By 2016, Germany's sauces, dressings and condiments market will be valued at US\$4.9 billion, with total volume sales of 943,600 tonnes. Value sales are expected to grow at a CAGR of 2.5%, while volume sales growth will likely be stagnant or negative. This means that price increases will be a major factor in value sales growth. Dips and barbecue sauces are expected to register relatively strong growth, at a CAGR of 4.8% and 4.6%, respectively. Each category is expected to maintain similar market share in value and volume terms during the 2011-2016 period, as compared to the 2006-2011 period.
- ▶ Considering the stagnant volume consumption in some of the traditionally popular sub-categories, such as salad dressings, vinaigrettes, barbecue sauces, and ketchup, new product development and product differentiation will likely be the key for market expansion, including the introduction of new flavours, healthy options and convenient packaging.

Distribution

- ▶ Store-based retailing was the predominant distribution channel for sauces, dressings and condiments in Germany throughout the 2006-2011 period. Non-store-based retailing, including Internet shopping, represented less than 0.5% of distribution during the same period.
- ▶ Discounters held the largest distribution share of sauces, dressings and condiments in Germany during the 2006-2011 period. This channel gradually grew, accounting for 46.1% in 2011. Supermarkets/hypermarkets, the second-largest channel, maintained approximately 37% of distribution share. Within small grocery retailers, independent small grocers represented 12.3% of the distribution in 2011. However, this channel's share has decreased gradually every year, as discounters and supermarkets/hypermarkets expanded.

Germany's Sauces, Dressings and Condiments Distribution Share by Major Channels in 2011
- % of Retail Value Sales



Source: Euromonitor International, 2012.



▶ **RETAIL SALES (continued)**

**Germany's Sauces, Dressings and Condiments Market
by Retail Value Sales (Historic/Forecast) in US\$ Millions**

Category	2006	2011	2012	2016	2006-11 CAGR	2011-16 CAGR
Sauces, dressings and condiments total	3,788.8	4,378.5	4,492.8	4,956.1	2.9%	2.5%
Cooking sauces	1,866.4	2,117.6	2,173.0	2,391.7	2.6%	2.5%
Bouillon/stock cubes	314.1	327.2	335.8	365.1	0.8%	2.2%
Dry sauces/powder mixes	374.5	393.8	402.3	439.5	1.0%	2.2%
Herbs and spices	604.4	700.9	722.4	800.1	3.0%	2.7%
Pasta sauces	387.2	500.9	513.5	553.2	5.3%	2.0%
Wet/cooking sauces	186.1	194.8	199.1	233.8	0.9%	3.7%
Dips	68.3	111.4	116.2	140.8	10.3%	4.8%
Pickled products	510.1	729.4	749.8	818.9	7.4%	2.3%
Table sauces	1,283.1	1,345.3	1,376.3	1,519.6	1.0%	2.5%
Barbecue sauces	163.2	185.9	195.5	233.2	2.6%	4.6%
Cocktail sauces	23.2	24.8	25.8	28.7	1.3%	3.0%
Curry sauces	16.5	18.0	18.5	21.1	1.8%	3.2%
Fish sauces	4.5	4.9	5.0	5.8	1.7%	3.4%
Horseradish sauces	53.0	52.2	52.8	56.3	-0.3%	1.5%
Ketchup	314.1	310.7	313.8	344.1	-0.2%	2.1%
Mayonnaise	185.7	196.5	200.0	215.1	1.1%	1.8%
Mustard	166.6	177.1	183.1	201.2	1.2%	2.6%
Oyster sauces	3.8	4.2	4.3	5.0	2.0%	3.5%
Salad dressings	182.8	185.2	187.0	198.8	0.3%	1.4%
Soy-based sauces	50.6	59.5	61.1	67.2	3.3%	2.5%
Spicy chili/pepper sauces	59.2	63.9	66.2	74.4	1.5%	3.1%
Vinaigrettes	21.4	21.6	22.0	23.6	0.2%	1.8%
Worcester/steak sauces	34.8	37.3	37.4	41.2	1.4%	2.0%
Other table sauces	3.8	3.6	3.7	3.8	-1.1%	1.1%
Tomato pastes and purées	57.2	70.9	73.6	80.7	4.4%	2.6%
Other sauces, dressings and condiments	3.8	3.9	4.0	4.4	0.5%	2.4%

Source: Euromonitor International, 2012.
* CAGR: compound annual growth rate



▶ **RETAIL SALES (continued)**

**Germany's Sauces, Dressings and Condiments Market
by Retail Volume Sales (Historic/Forecast) in Thousands of Tonnes**

Category	2006	2011	2012	2016	2006-11 CAGR	2011-16 CAGR
Sauces, dressings and condiments total	862.0	943.4	945.0	943.6	1.8%	0.0%
Cooking sauces	155.8	169.6	170.4	172.8	1.7%	0.4%
Bouillon/stock cubes	19.1	19.6	19.8	19.5	0.5%	-0.1%
Dry sauces/powder mixes	20.3	20.8	20.7	20.6	0.5%	-0.2%
Herbs and spices	10.7	12.1	12.2	12.4	2.5%	0.5%
Pasta sauces	61.1	71.8	72.2	71.7	3.3%	0.0%
Wet/cooking sauces	44.6	45.3	45.5	48.7	0.3%	1.5%
Dips	4.3	7.0	7.1	7.8	10.2%	2.2%
Pickled products	322.6	397.1	399.1	396.8	4.2%	0.0%
Table sauces	360.5	347.2	346.1	343.1	-0.7%	-0.2%
Barbecue sauces	38.7	38.1	40.4	42.3	-0.3%	2.1%
Cocktail sauces	4.0	4.2	4.2	4.3	1.0%	0.5%
Curry sauces	2.7	2.8	2.9	3.0	0.7%	1.4%
Fish sauces	0.3	0.3	0.3	0.3	0.0%	0.0%
Horseradish sauces	6.4	6.1	6.1	5.8	-1.0%	-1.0%
Ketchup	132.0	120.5	118.8	117.6	-1.8%	-0.5%
Mayonnaise	68.3	68.5	66.4	64.0	0.1%	-1.3%
Mustard	38.9	37.5	37.9	37.6	-0.7%	0.1%
Oyster sauces	0.3	0.3	0.3	0.3	0.0%	0.0%
Salad dressings	48.7	47.9	47.6	46.3	-0.3%	-0.7%
Soy-based sauces	3.2	3.7	3.7	3.7	2.9%	0.0%
Spicy chili/pepper sauces	7.4	7.7	7.8	8.0	0.8%	0.8%
Vinaigrettes	5.3	5.3	5.3	5.4	0.0%	0.4%
Worcester/steak sauces	4.0	4.1	4.0	4.0	0.5%	-0.5%
Other table sauces	0.2	0.2	0.2	0.2	0.0%	0.0%
Tomato pastes and purées	18.5	22.2	22.0	22.8	3.7%	0.5%
Other sauces, dressings and condiments	0.3	0.3	0.3	0.3	0.0%	0.0%

Source: Euromonitor International, 2012.
* CAGR: compound annual growth rate



▶ MARKET SHARE BY COMPANY

- ▶ Nestlé SA was the largest player by value sales over the 2006-2011 period. In 2011, Nestlé SA accounted for 13.5% of the total market, followed by Fuchs Gewürze GmbH & Co, with 13.4%, and Unilever Group with 11.5%. The top three global companies, Nestlé SA, Unilever Group, and Kraft Food Inc., have multiple brands covering various product categories. The three top German companies, Fuchs Gewürze GmbH & Co, Carl Kühne KG, and Hengstenberg GmbH & Co, Richard, specialize in certain product groups, such as seasonings, pickled condiments and dressings, and are competitive in their specialized product categories.
- ▶ Unilever Group's Knorr brand held the largest brand share, maintaining slightly more than 10% during the 2006-2011 period. However, Knorr lost 1.4 percentage points of its share from 2006, as the market became more fragmented, with the entry of new competitors in various product ranges. The Knorr brand was particularly strong in pasta and barbecue sauces. The second-largest brand, Kühne (Carl Kühne KG), maintained stable brand share, with an average of 7.6% during 2006-2011. Kühne's products include dressings, vinegars, sauces and pickles.

Germany's Sauces, Dressings and Condiments, Market Share by Company - % of Retail Value Sales

Companies	2006	2007	2008	2009	2010	2011
Nestlé SA	15.6	15.0	14.5	13.9	13.7	13.5
Fuchs Gewürze GmbH & Co	13.9	13.9	13.5	13.4	13.6	13.4
Unilever Group	13.0	12.1	11.9	11.6	11.7	11.5
Carl Kühne KG	7.4	7.7	7.7	7.7	7.7	7.6
Kraft Foods Inc	4.3	4.2	4.1	4.1	4.0	3.9
Hengstenberg GmbH & Co, Richard	3.1	3.4	3.5	3.5	3.6	3.5
Barilla Holding SpA	2.4	2.6	2.7	2.9	2.9	2.9
Heinz Co, HJ	2.7	2.6	2.7	2.7	2.7	2.6
Gewürzwerke Hermann Laue	2.0	1.9	1.9	1.9	1.8	1.8
Develey Senf & Feinkostfabrik GmbH	1.8	1.8	1.8	1.8	1.7	1.7
Spreewaldkonserve Golßen GmbH	1.4	1.5	1.6	1.7	1.7	1.7
Wagner Gewürze GmbH	0.9	1.0	1.0	1.0	1.0	1.0
Kikkoman Corp	0.6	0.7	0.7	0.7	0.7	0.7
Homann Feinkost GmbH & Co KG	0.6	0.5	0.5	0.5	0.5	0.5
Händlmaier Senffabrikation GmbH & Co KG, Luise	0.5	0.5	0.5	0.5	0.5	0.5
Intersnack Knabber-Gebäck GmbH & Co KG	0.4	0.4	0.4	0.4	0.4	0.4
Schamel Erste Bayerische Meerrettich Feinkostfabrik GmbH	0.4	0.4	0.4	0.4	0.4	0.4
Kamps Food Retail Investments SA	-	-	0.3	0.4	0.4	0.4
Kochs Meerrettich GmbH	0.3	0.3	0.3	0.3	0.3	0.3
Campbell Soup Co	0.3	0.3	0.3	0.3	0.3	0.3
Grupo Ebro Puleva SA	-	0.3	0.3	0.3	0.3	0.3
McIlhenny Co	0.3	0.3	0.3	0.2	0.2	0.2
McDonald's Corp	0.3	0.3	0.3	0.3	0.2	0.2
Mars Inc	0.2	0.2	0.2	0.2	0.2	0.2
Rila Feinkost-Importe GmbH Co KG	0.1	0.1	0.1	0.1	0.1	0.1
Birkel/3 Glocken Teigwaren GmbH	0.3	-	-	-	-	-
Theodor Kattus GmbH	0.3	-	-	-	-	-
Zertus GmbH	-	-	-	-	-	-
Private Label	18.4	19.5	20.3	20.8	20.7	20.1
Others	8.4	8.5	8.2	8.5	8.8	10.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

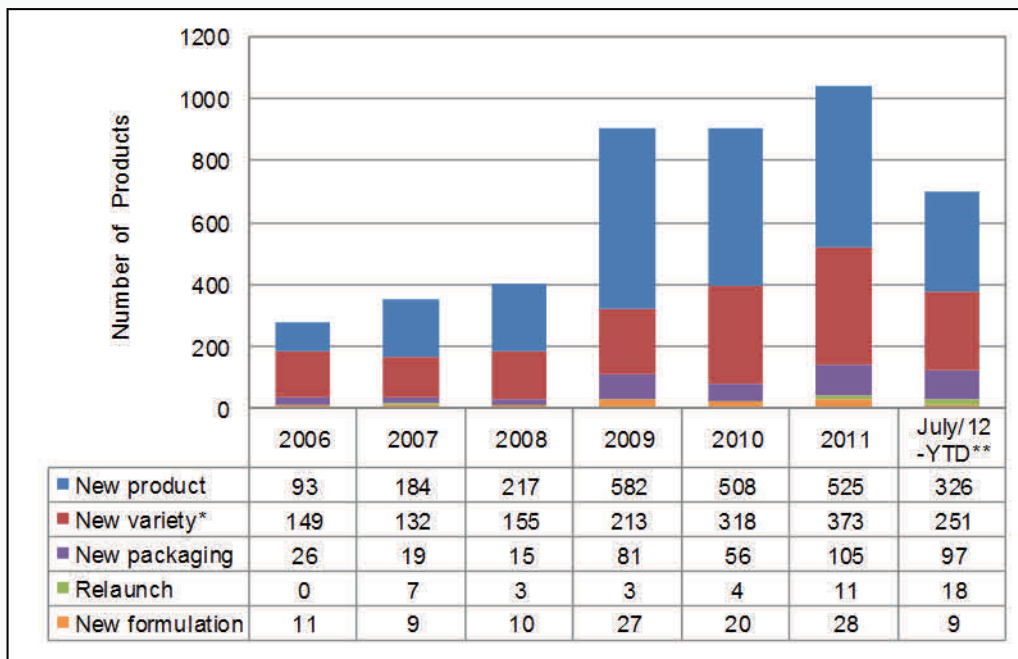
Source: Euromonitor International, 2012.



▶ **NEW PRODUCT LAUNCHES**

- ▶ According to Mintel, there were 4,585 new sauces, dressings and condiment products launched in Germany between January 2006 and July 2012, with the largest number – 1,042 new products – coming to market in 2011. Of these new products, 2,435 were novel, representing 53.1% and the rest of the products were new varieties/ range extensions, new packaging, new formulations and relaunched. From January 2012 to July 2012, there were 701 products launched, more than were launched during the same seven-month period in 2011.

New Sauces, Dressings and Condiments Launched in Germany from January 2006 to July 2012, by Year and Launch Type



Source: Mintel, 2012. * Note: New variety includes range extension. **YTD: year-to-date

New Sauces, Dressings and Condiments Launched in Germany from January 2006 to July 2012, by Top 10 Companies

Company	Number of Products
Aldi	330
Unilever	292
Maggi	127
Norma	114
Lidl	96
Penny Markt	92
Hengstenberg	79
Rewe	77
Rila Feinkost-Importe	74
Kraft Foods	70

Source: Mintel, 2012

Major Companies

- ▶ For all the product categories, Aldi had the most new launches, with 330 products, accounting for 7.2% of new launches over the 2006-2012 period. Unilever launched 292 products during the same period, representing 6.4% of new products.
- ▶ Aldi launched the most new cooking sauces, with 38 products; pickled condiments with 49 products; and table sauces with 53 products. Unilever recorded the highest number of new launches within the pasta sauces sub-category with 44 products; seasonings with 145 products; and stocks with 18 products.
- ▶ Among German companies, Hengstenberg has the highest number of new dressings and vinegars, with 40 products, and Homman Feinkost launched the most new dips, with 18 products.

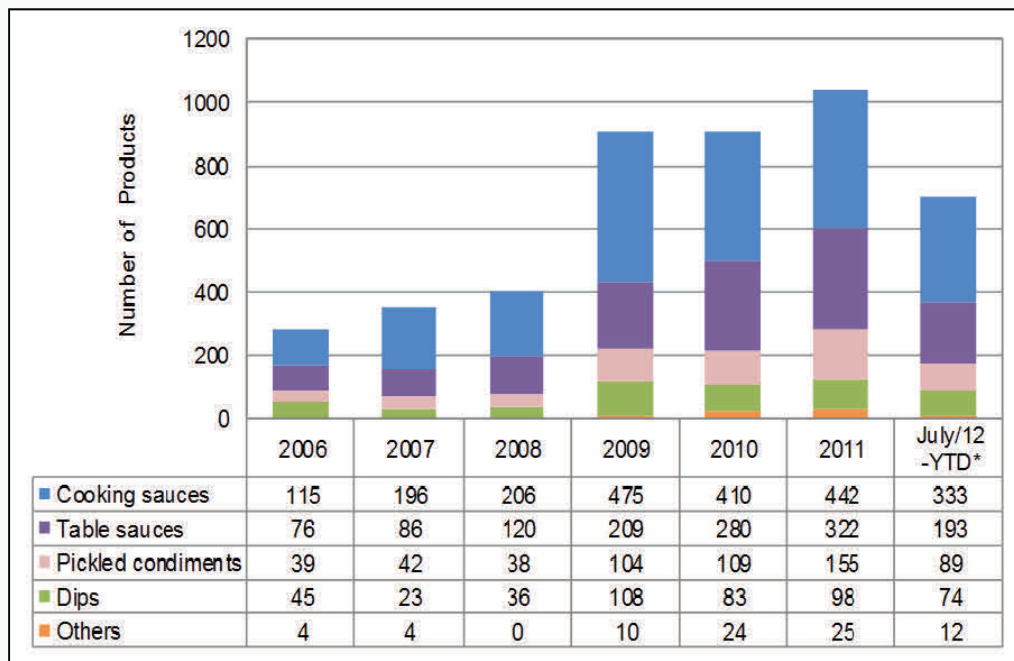


▶ **NEW PRODUCT LAUNCHES (continued)**

Major Categories

- ▶ Of the 4,585 new launches, 2,177 were cooking sauces, accounting for 47.5% of total new launches, followed by table sauces with 1,286 products, representing 28% of total new launches. Among the new cooking sauce products, there were 1,132 seasoning products (52%), 469 wet cooking sauces (21.5%), 419 pasta sauces (19.2%) and 157 stocks.

New Sauces, Dressings and Condiments Launched in Germany from January 2006 to July 2012, by Year and by Product Category



Source: Mintel, 2012 * YTD: year-to-date

New Sauces, Dressings and Condiments Launched in Germany from January 2006 to July 2012, by Top 10 Claims

Claims	Number of Products
No additives/preservatives	1,095
Organic	979
Low/no/reduced allergen	281
Premium	257
Gluten-free	237
Ease of use	216
Vegetarian	172
Convenient packaging	169
Low/no/reduced fat	147
Low/no/reduced lactose	135

Source: Mintel, 2012

Major Claims

- ▶ No additives/preservatives was the most popular claim for sauces, dressings and condiments launched in Germany during the 2006-2012 period; this claim appeared on 1,095 products. The next most common claim was organic, on 979 products. Other significant claims were low/no/reduced allergen, on 281 products, premium on 257 products, gluten-free on 237 products, and ease of use on 216 products.
- ▶ Mustard, egg, milk, celery, and sulphur dioxide/sulphites were the top five common ingredients to warrant an allergen alert. Mustard was the most common allergen indicated on cooking sauces and table sauces. Of the 39 premium dressings and vinegars, 14 products (35.9%) claim to have low/no/reduced sulphur dioxide/sulphites.

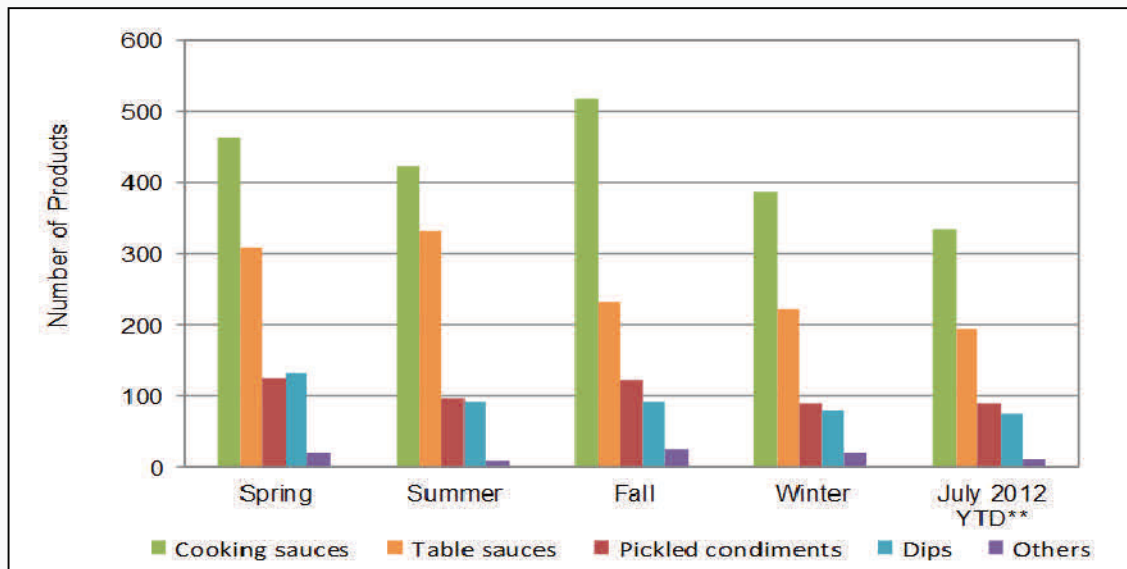


▶ NEW PRODUCT DEVELOPMENT TRENDS

Seasonality

- ▶ The sales performance of sauces, dressings and condiments in Germany is clearly related to seasonal conditions. For the whole category, March had the highest number of new launches with 450* products, or 11.6% of the total new products launched between January 2006 and December 2011. For cooking sauces, March and November were the most active months of the new product launches. In addition, the other product groups highly influenced by summer seasonal sales, such as table sauces, had a higher number of new products launched during spring and summer than other seasons.

New Sauces, Dressings and Condiments Launched in Germany by Category and Season, From January 2006 to December 2011 vs. From January 2012 to July 2012



Source: Mintel, 2012. *Note: The new products launched between January 2012 and July 2012 are excluded for monthly and seasonal analyses, since only some monthly or seasonal data is available for 2012.*

* YTD: year-to-date

Innovation Trends

- ▶ According to Euromonitor (2011), there were a limited number of innovations in Germany's sauces, dressings and condiments market. Recent launch patterns also showed that there was an increasing number of relaunches and range extensions of existing products. In addition, some of the recent innovations, such as Knorr Bouillon Pur Delikatess gelatine bouillon, showed low sales performance in the German market. By contrast, the organic brand Alnatura's cube stocks have increased distribution within the mass market channel, with positive sales performance in terms of sales per store.
- ▶ Increasing consumer demand for convenient packaging encourages producers of sauces, dressings and condiments to continue to introduce new products with improved portionability, or in microwavable containers or in containers with an easy dispensing mechanism. For example, there were three spray-bottled dressing products introduced in the market under the Finest Gourmet brand by IMEX Handelsgesellschaft, which were meant to appeal to consumers looking for easy-to-dispense dressings.



Knorr's Bouillon Pur Delikatess by Unilever is gelatined, easy dissolving bouillon product, made from high quality plant-based ingredients.
Source: Mintel, 2012



Alnatura's Gemüse Brühe Vegetable Bouillon is a cubed stock, made with certified organic ingredients.
Source: Mintel, 2012



▶ NEW PRODUCT DEVELOPMENT TRENDS (continued)

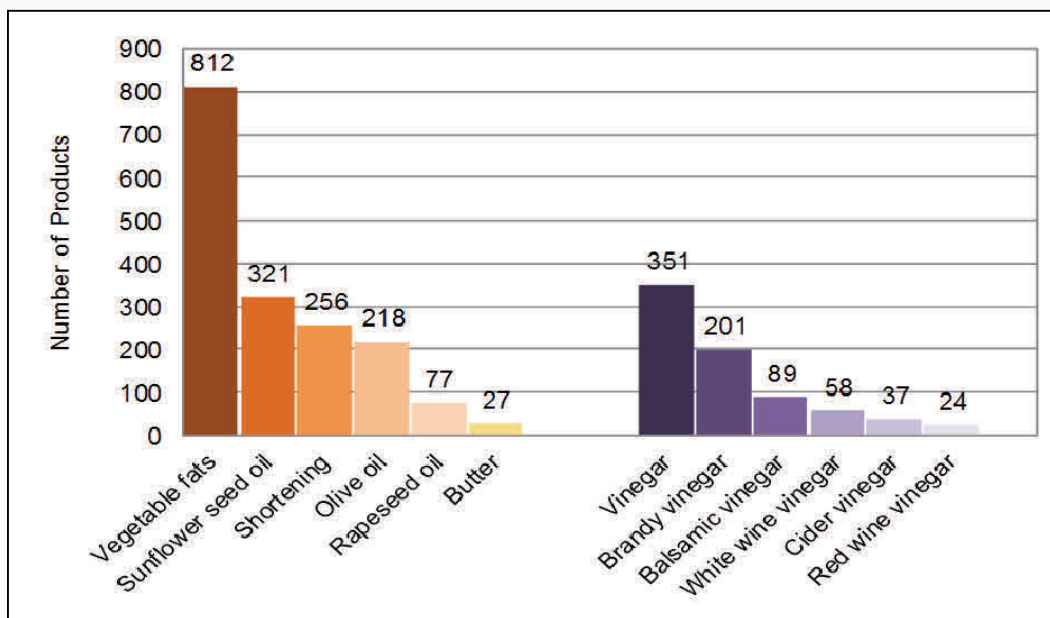
Flavour Trends

- ▶ There were 819 flavours (including flavour blends) for 4,585 new sauces, dressings and condiments launched in Germany over the 2006-July 2012 period. As the number of new product releases increased, so did the number of new flavours, diversifying consumer choices. For example, 2011 had the highest number of new product launches as well as the most new flavours, with a total of 289 flavours introduced. In addition, in 2009 when there was the greatest expansion of new product launches, 126.5% more than 2008, the total number of flavours introduced in the market was 249, an increase of 97.6% from the previous year.
- ▶ Among total new products, unflavoured/plain, with 151 products, was the most popular flavour, followed by tomato with 129 products. Mustard was the third-most popular flavour with 76 products, followed by garlic and vegetable, with 64 products each.

Major Ingredients Analyses

- ▶ Since 2006, an increasing number of spicy and hot flavour components have been introduced in the market. For example, an increasing number of curry (including blends of curry flavours), various kinds of chilli peppers, and strong blends of mustard and wasabi were often used as ingredients and branded in the product names. However, mild flavours and their ingredients are still predominant.
- ▶ Major ingredients for sauces, dressings and condiments in Germany were vegetables, herbs, fats, cereals and vinegars. For vegetables, peppers were the most commonly used, followed by tomatoes, including puree, paste and powder forms. Onion and garlic were also popular ingredients.
- ▶ Vegetable fats were the most commonly used oil and fat ingredient across diverse product types. The next popular oil and fat ingredient was sunflower seed oil. Of the 321 products using sunflower seed oil, 46.1% were pasta sauces and vegetable dips. Rapeseed oil was used in 77 new products, 53.2% of them were table sauces and dressings. For acidic components, the most commonly used vinegar was regular vinegar (variation of distilled white vinegar) for all types of products. Brandy vinegar was the next most popular vinegar, with 201 new products, 59.7% of which were pickled condiments and table sauces (excluding dressings and pure vinegar products).

Major Vinegars, Oils and Fats Used in New Sauces, Dressings and Condiments Launched in Germany from January 2006-July 2012



Source: Mintel, 2012



▶ NEW PRODUCT SAMPLES

The following are some examples of the new sauces, dressings and condiments launched in Germany between January 2012 and July 2012, from the Mintel Global New Products Database (2012).



Fine Tofu Bolognese

Company: Tofu Life
Brand: Avantissimo
Category: Sauces and seasonings
Sub-Category: Pasta sauce
Date Published: July 2012

Launch Type: New product
Price (US\$): 2.26
Packaging: Plastic PET tray
Position Claims: Microwaveable, organic, vegan, ease of use, no animal ingredients

Ingredients: Water, tomato puree, soybean curd (water, soybean, firming agents (7%, magnesium chloride, calcium sulfate)), wheat protein, sunflower seed oil, yeast, unrefined natural sugar (raw), spices, soy sauce (water, soybean, wheat, salt), roasted onion (onion, vegetable oils, wheat flour, salt), oregano, sea salts, garlic, carob bean gum (thickeners), celery from controlled organic cultivation

Product Description: Avantissimo Feine Tofu Bolognese (Fine Tofu Bolognese) is a meat-free bolognese sauce. This pan-ready product is suitable for vegans and retails in a 250 g pack.

Hot Chili Barbecue Salt

Company: Saline Bad Reichenhaller
Brand: Bad Reichenhaller
Category: Sauces and seasonings
Sub-Category: Seasonings
Date Published: July 2012

Launch Type: New variety/range extension
Price (US\$): 1.90
Packaging: Plastic PET tube
Position Claims: No additives/preservatives, gluten-free, low/no/reduced allergen

Ingredients: Iodized salt, spices (chili pepper, paprika, ginger, garlic, onion, cumin seed, parsley, curcumin), tomato, spice extract (chili), silicon dioxide (food acids, anti-caking agents), folic acid (food acids)

Product Description: Bad Reichenhaller Hot Chili Barbecue Salz (Hot Chilli Barbecue Salt) is formulated with salt from the Alps. This gluten-free product contains folic acid (vitamin B). It is free from taste enhancers and retails in a 108 g pack.



Garlic Vinegar

Company: Mautner Markhof
Brand: Mautner Markhof Feine Auswahl
Category: Sauces and seasonings
Sub-Category: Dressings and vinegar

Date Published: July 2012
Launch Type: New product
Price (US\$): 3.27
Packaging: Plain glass bottle

Ingredients: Brandy vinegar, apple juice concentrate, garlic (fresh), natural garlic flavour

Product Description: Mautner Markhof Knoblauchessig (Garlic Vinegar) is a mild and spicy vinegar made with fresh garlic. This naturally fermented speciality vinegar from Austria contains 6% acid and retails in a 500 ml bottle. Also available are the following varieties: Zitronenessig (Lemon Vinegar); Kräuternessig (Herbal Vinegar); Walnussessig (Walnut Vinegar); Apfelessig (Apple Vinegar); and Essig Mediterran (Mediterranean Vinegar). Mediterranean Vinegar is a naturally fermented vinegar with the aroma of Italian herbs, refined with black olives. This vinegar is ideal for seasoning salads. The product with 6% acidity retails in a 500 ml bottle.

Source for all: Mintel, 2012



▶ **NEW PRODUCT SAMPLES (continued)**



Dry Mix for Goulash

Company: Kaufland Warenhandel
Brand: K Classic Fix Für Fleischgerichte
Category: Sauces and seasonings
Sub-Category: Seasonings
Date Published: July 2012

Launch Type: New variety/range extension
Price (US\$): 0.32
Packaging: Paper foil lined flexible sachet
Position Claims: No additives/ preservatives

Ingredients: Wheat flour, iodized salt, maltodextrin, white sugar, peppers, caramelised sugar syrup, onion, flavouring substances, yeast extracts, tomato powder, vegetable fats, lactose, citric acid (food acids), spices, guar gum (thickeners), garlic

Product Description: K Classic Fix Für Fleischgerichte Gulasch (Dry Mix for Goulash) does not contain monosodium glutamate, a taste enhancer. This product retails in a 50 g sachet, which is sufficient for four portions.

Devilish Hot Mustard

Company: Carl Kühne
Brand: Kühne Heiss Macher
Category: Sauces and seasonings
Sub-Category: Table sauce
Date Published: July 2012

Launch Type: New product
Price (US\$): 1.26
Packaging: Metal aluminium tube
Position Claims: No additives/preservatives

Ingredients: Water, vinegar, mustard seeds, white sugar, salt, horseradish (dry), seasoning, natural flavouring substance, caramelised sugar syrup, xanthan gum (thickeners)

Product Description: Kühne Heiss Macher Teuflich Scharfer Senf (Devilish Hot Mustard) is a spicy mustard and horseradish sauce, which is free from preservatives and flavour enhancers. The product retails in a 200 ml tube.



Dip Mix

Company: Netto Marken-Discount
Brand: Delique
Category: Savoury spread
Sub-Category: Dips

Date Published: June 2012
Launch Type: New product
Price (US\$): 1.28
Packaging: Plastic tube

Ingredients for Nacho Cheese Dip: Fresh cheese (fresh, low fat,) vegetable oils, cream, water, bell pepper (pieces), white sugar, natural cheese flavor, salt, gherkin, brandy vinegar, egg yolks, onion, glucose, modified starch, thickeners (guar gum, xanthan gum), spices, maltodextrin, starch, mustard seeds, herbs, curcumin

Ingredients for Guacamole: Fresh cheese (fresh, low fat), cream, vegetable oils, water, bell pepper (pieces), salt, garlic, apple juice concentrate, glucose, brandy vinegar, white sugar, spices, egg yolks, lemon juice concentrate, chili pepper, powered avocado, modified starch, herbal extracts (extract, food colours, plant based), nettle extract, curcumin (extract), copper chlorophylls (food colours, complex), maltodextrin, thickeners (guar gum, xanthan gum), starch, mustard seeds, lactic acid (food acids), herbal extracts, yeast extracts

Ingredients for Red Salsa: water, powered tomato, white sugar, sodium diacetate (food acids), modified starch, bell pepper (pieces), spices, onion, flavouring substances (milk), salt, guar gum (thickeners), powered chili pepper

Product Description: Delique Dip Mix comprises three different types of dips, including nacho cheese, guacamole, and red salsa. This product retails in a 300 g pack, containing two pots of each variety.

Source for all: Mintel, 2012



▶ **NEW PRODUCT SAMPLES (continued)**



Chalkidiki Olives

Company: Gaea Products
Brand: Gaea
Category: Sauces and seasonings
Sub-Category: Pickled condiments
Date Published: July 2012

Launch Type: New packaging
Price (US\$): 1.63
Packaging: Flexible stand-up metalized film pouch
Position Claims: No additives/ preservatives, premium

Ingredients: Green olive, salt, marinade (extra virgin olive oil, oregano, coriander, lemon peel, garlic)

Product Description: Gaea Chalkidiki Oliven (Chalkidiki Olives) is now available in snack pack size. Chalkidiki Olives are marinated with Mediterranean herbs and said to be famous for their crunchy and fresh taste. This product does not contain any stones or added flavour enhancers. This premium Greek product retails in a 65 g pack.

Guinness Flavoured Brown Sauce

Company: Heinz
Brand: HP
Category: Sauces and seasonings
Sub-Category: Table sauce
Date Published: June 2012

Launch Type: New variety/range extension
Price (US\$): 4.51
Packaging: Plastic tottle (a bottle that sits on its cap)
Position Claims: No additives/preservatives, low/no/reduced fat, co-branded, ethical-environmentally friendly package

Ingredients: tomato, glucose fructose syrup, molasses, vinegar, white sugar, water, modified starches, caramel I plain (food colours), stout (barley), flavouring substances (wheat), salt, garlic powder, onion powder, citric acid (food acids), black pepper, spices

Product Description: HP Guinness Brown Sauce mit Guinness (Guinness Flavoured Brown Sauce) is claimed to combine the strong and smooth taste of Guinness with the distinctive flavour of HP. It is ideal for sausages and red meat dishes. This product is free from artificial colours or preservatives, low in fat, and retails in a 475 g recyclable tottle.



Salad Dressing Spray with Balsamic Vinegar

Company: IMEX Handelsgesellschaft
Brand: Finest Gourmet
Category: Sauces and seasonings
Sub-Category: Dressings and vinegar

Date Published: July 2012
Launch Type: New variety/range extension
Price (US\$): 3.77
Packaging: Plastic PET bottle

Ingredients: Balsamic vinegar (wine vinegar, grape cider (concentrate), colouring agent (caramel spirit), sulfur dioxide (antioxidants)), grape cider (concentrate)

Product Description: Finest Gourmet Salatspray mit Balsamessig (Salad Dressing Spray with Balsamic Vinegar) is made with balsamic vinegar from Modena, Italy. This product is claimed to be ideal for salads, and retails in a 250 ml spray bottle.

Source for all: Mintel, 2012



▶ NEW PRODUCT SAMPLES (continued)



Spices for Coffee, Cocoa, Tea

Company: Grünsfelder Biologistik
Brand: Voodoo Food
Category: Sauces and seasonings
Sub-Category: Seasonings
Date Published: May 2012

Launch Type: New product
Price (US\$): 4.51
Packaging: Composite multi-layer board
Position Claims: Organics

Ingredients: Cinnamon, allspice, cloves, ginger, cardamom

Product Description: Voodoo Food Charme Du Cafe Gewürz für Kaffee, Kakao, Tea (Spices for Coffee, Cocoa, Tea) is a seasoning for coffee, hot chocolate and tea, containing a combination of cinnamon, allspice, cloves, ginger and cardamom. It is also suitable for seasoning muesli, ice cream, cakes and fruit salads. The organic product retails in a 50 g drum with sprinkler.

Yeast Free Pumpkin Spread

Company: Rossmann
Brand: Rossmann EnerBio
Category: Savoury spreads
Sub-Category: Savoury vegetable pastes
Date Published: February 2012

Launch Type: New product
Price (US\$): 1.72
Packaging: Plain glass jar
Position Claims: Organic, vegetarian, gluten-free, low/no/reduced allergen, low/no/reduced lactose

Ingredients: Pumpkin, water, sunflower seed oil, onion, carrot, unrefined natural sugar (raw), lemon juice, cashew nut, corn semolina, sea salts, spices, guar gum (thickeners)

Product Description: Rossmann EnerBio Kurbis Hefefreier Brotaufstrich (Yeast Free Pumpkin Spread) has been repackaged. This light organic certified and vegetarian product is free from gluten, lactose and yeast, and is retailed in a 125 g jar.



Source for both: Mintel, 2012

▶ SOURCES

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— Category Insight Report: Table Sauces, Seasonings, and Sweeteners, May / August 2012

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▶ ANNEX: DEFINITIONS

The following definitions are used by Euromonitor International (2012) for sauce, dressing and condiment product categories.

▶ **Sauces, Dressings and Condiments**

This is the aggregation of tomato pastes and purees, bouillon/stock cubes, herbs and spices, table sauces, soy-based sauces, pasta sauces, wet/cooking sauces, dry sauces/powder mixes, ketchup, mayonnaise, mustard, salad dressings, vinaigrettes, dips, pickled products, and other sauces, dressings and condiments.

▶ **Cooking Sauces**

This is the aggregation of bouillon/stock cubes, dry sauces/powder mixes, herbs and spices, MSG, pasta sauces and wet/cooking sauces.

▶ **Bouillon/Stock Cubes**

This is the aggregation of stock cubes, gravy cubes and powders, and liquid stocks.

▶ **Dry Sauces/Powder Mixes**

Dry sauces to which boiling water or milk is added before consumption. Dry recipe powder mixes and dry powder marinades are included here. Some dry sauces may require heating over the stove for the sauce to thicken after water/milk is added. Product types include hollandaise sauce, white sauce, pepper sauce, sweet and sour sauce, spaghetti bolognese, etc. Please note that foodservice and retail volumes are shown in terms of as sold, and are not reconstituted volumes. Leading global companies include Unilever, and Nestle.

▶ **Herbs and Spices**

This is aggregation of packaged dehydrated herbs and spices, including pepper. Herb and spice mixes that are added to boiling water to make soup are included. Note that fresh herbs and spices, frozen herb and spice, herbs and spices purées/pastes and salt are excluded. Herb and spice purées/pastes are defined under other categories. Leading global companies include McCormick & Co, Burns Philip & Co and Unilever.

▶ **Pasta Sauces**

These sauces are either added directly to cooked pasta or heated up for a few minutes beforehand, or alternatively added to fresh ingredients, eg meat or vegetables, and heated up to make a sauce which will then be added to cooked pasta. Usually sold shelf -stable ambient in cans or in glass jars, fresh pasta sauces have recently appeared in chilled and freezer cabinets in more developed markets. Tomato frito (Spain) is included. Product types include: bolognese, carbonara, mushroom, tomato, vegetable, pesto, etc. excluding dehydrated pasta sauces. Leading global brands include Ragu (Unilever), Prego (Campbell Soup), Dolmio (Mars), Barilla (Barilla), Classico (Heinz).

▶ **Wet/Cooking Sauces**

Liquid (i.e. non-dehydrated) cooking sauces/pastes that are added to ingredients (meat and/or vegetables) to produce a meal. The definition includes recipe sauces/pastes that could be added before the cooking process (marinades) and/or during the cooking process (e.g. steaming, grilling, stir-frying, stewing, etc.). Includes all such products, be they sold in a chilled, frozen or shelf-stable/ambient format. Sauces/pastes that are also used as table sauces are excluded here (see table sauces). Wet/cooking sauces are usually categorized by type of cuisine (e.g. Italian, French, Indian, Chinese, Thai, Mexican, etc.). Leading global brands include, Franco-American (Campbell Soup), Heinz (Heinz), Marumiya (Marumiya Corp.), Lee Kum Kee (Lee Kum Kee Co. Ltd.).

▶ **Dips**

This includes a wide variety of products and flavours intended as an accompaniment to, food like crisps/chips, breadsticks, pita bread, etc. Products are marketed to stimulate the appetite (i.e. as appetizers) and are not considered to be part of a meal. Includes all such products sold in a frozen, chilled, dehydrated or shelf-stable/ambient format. Dips can also come in a ready-to-consume format or require further preparation (i.e. thawing, rehydration, etc.). Product types include guacamole, taramasalata, hummus, tzatziki, Mexican sauce dips (salsa/picante), spicy tomato dips, American flavour dips, cheese dips, etc. Leading global companies include PepsiCo Inc, Campbell Soup and General Mills.



▶ ANNEX: DEFINITIONS (continued)

▶ **Table Sauces**

This definition covers sauces that are used as table sauces such as brown sauce, soy-based sauce, chili, worcester, plum, mint sauce for meat, tartar sauce, apple sauce for meat, horseradish, cranberry sauce for meat, etc. It also includes sauces that are multi-purpose and can be used as table sauces, as well as a marinade or a cooking sauce (e.g. during stir-frying, steaming, etc.) such as oyster, hoisin, soy-based sauces, etc. Includes all such products, be they chilled, frozen or shelf-stable/ambient. Various types of fermented sauces exist in different regions and different variants are included for each country. Leading global brands include Lee Kum Kee (Lee Kum Kee), Haitian (Foshan Haitian Flavouring & Food), Kraft (Kraft Foods), Heinz (Heinz Co).

▶ **Barbecue Sauces**

Any sauces primarily intended to dress, marinade or otherwise be used on barbecued meat. While it can be applied to any food, it usually tops meat after cooking or during barbecuing, grilling, or baking. It sometimes carries with it a smoky flavour, often because barbecue sauces are a type of fermented sauce. The ingredients vary, but some commonplace items are tomato paste, vinegar, spices, Worcester sauce and sweeteners. These variations are often due to regional traditions and recipes.

▶ **Cocktail Sauces**

Cocktail sauce in its simplest form is ketchup mixed with prepared horseradish.

▶ **Curry Sauces**

Curry is a generic description used throughout Western culture to describe a variety of spiced dishes, especially from Indian or other East, South and Southeast Asian cuisines. Curry sauce is made with curry powder or a paste made from the powder and oils. Curry powder is a spice mixture of widely varying composition, with most relying heavily on ground turmeric, which produces a very yellow sauce. Lesser ingredients in these Western yellow curry powders are often coriander, cumin, fenugreek, mustard, chili, black pepper and salt. Other ingredients that could feature in curry powder – and thus curry sauces – include allspice, white pepper, ground mustard, ground ginger, garlic cinnamon, roasted cumin, cloves, nutmeg, mace, green cardamom seeds or black cardamom pods, bay leaves, add coriander seeds. Curry sauces include not only curry-flavoured table sauces inspired from Indian/South Asian cuisine, but also these from Japan, Thailand, Africa (i.e. Ethiopia) and the Caribbean.

▶ **Fish Sauces**

Fish sauce is a condiment that is derived from fish that has been allowed to ferment. It is an essential ingredient in many curries and sauces. Fish sauce is a staple ingredient in Filipino, Vietnamese, Thai, Laotian, and Cambodian cuisine and is used in other Southeast Asian countries. In addition to being added to dishes during the cooking process, fish sauce can also be used in mixed form as a dipping condiment, for fish, shrimp, pork, and chicken.

▶ **Horseradish Sauces**

Horseradish sauce is made from grated horseradish root, vinegar and cream and is typically used as a spicy condiment. It is usually served with meat, and very often beef, but can be used in a number of other dishes, including sandwiches or salads. In the U.S., the term Horseradish Sauce refers to grated horseradish, combined with mayonnaise or Miracle Whip salad dressing (such as Arby's "Horsey Sauce"). Kraft Foods and other large condiment manufacturers sell this type of Horseradish Sauce. Prepared wasabi paste (i.e. ready-to-eat) is also included here. Please note that wasabi powder – which requires rehydration before consumption – is excluded here and tracked within other sauces, dressings and condiments.

▶ **Ketchup**

A well-known tomato sauce, commonly called ketchup but also known as "catsup" in some countries. The most famous brand is Heinz Tomato Ketchup. Excluded are tomato purée and passata, as well as tomato-based pasta or wet sauces. Leading global brands include Heinz (Heinz), Hunt's (ConAgra), Del Monte (Del Monte).

▶ **Mayonnaise**

This is the aggregation of regular and low fat mayonnaise



▶ ANNEX: DEFINITIONS (continued)

▶ **Mustard**

Spicy paste made from mustard seeds. Many varieties are available (e.g. English mustard, French mustard, Dijon mustard, mustard powder, Karashi etc.). Note that Piccalilli is excluded and defined under pickled products. Leading global brands include French's (Reckitt Benckiser), Grey Poupon (Kraft), Amora (Unilever), Maille (Unilever).

▶ **Oyster Sauces**

Oyster sauce describes a number of sauces made by cooking oysters. The most common in modern use is a viscous dark brown condiment made from sugar, salt and water thickened with cornstarch, flavoured with a little oyster essence or extract. Some versions may be darkened with caramel, though high quality oyster sauce is naturally dark. It is commonly used in Cantonese, Vietnamese and Khmer cuisine. Oyster sauce adds a savoury flavor to many dishes, making it an ideal choice for flavouring meat and vegetables. The sauce is a staple for much Chinese family-style cooking. Vegetarian oyster sauce is also included here. Vegetarian oyster sauce is prepared from mushrooms, often oyster mushrooms or shiitake mushrooms.

▶ **Salad Dressings**

This is the aggregation of regular and low fat salad dressing.

▶ **Soy-Based Sauces**

Soy-based fermented sauces. Product types include dark soy sauce and light soy sauce. The category also includes blended soy-based sauces; e.g. teriyaki (soy sauce blended with added sugar and mirin), sukiyaki (with added sugar, mirin and stock), yakitori (with added mirin, sake, sugar). Leading global brands include Kikkoman (Kikkoman Corp), Mitsukan (Mitsukan Co Ltd), and Amoy (Danone).

▶ **Spicy Chili/Pepper Sauces**

Any spicy table sauce/condiment primarily made from chillies and mixed with other ingredients. Many chilli sauces also feature vinegar, oil or a mixture of the two. They can also be sweetened with sugar or other sweeteners, ie sweet chilli sauce. Includes Mexican/Latin American spicy sauces, Cajun style spicy sauces (ie, Tabasco sauce), West Indian/Caribbean spicy sauces, Asian-style spicy chili sauces (Chinese chili sauce, Thai chili sauce, Korean Gochujang), etc.

▶ **Vinaigrettes**

Includes all vinegar-based salad dressings. Leading global companies include Kraft, Unilever, QP Corp.

▶ **Worcester/Steak Sauces**

A fermented liquid condiment, primarily used to flavour meat and fish dishes. The ingredients of a traditional bottle of Worcestershire sauce sold in the U.K. as "The Original & Genuine Lea & Perrins Worcestershire sauce" are malt vinegar (from barley), spirit vinegar, molasses, sugar, salt, anchovies, tamarind extract, onions, garlic, spice, and flavouring. The "spice, and flavouring" is believed to include cloves, soy sauce, lemons, pickles and peppers. Other Worcester-based steak sauces, like Kraft's A1 brand, are also included here.

▶ **Other Table Sauces**

Any other types of table sauces not specified above, including apple sauce for meat, cranberry sauce, mint sauce, plum sauce, etc.

▶ **Tomato Pastes and Purées**

Tomato concentrate/paste and purée. Passata is included. Tomato paste, or tomato concentrate, consists of tomatoes that have been cooked for several hours, strained and reduced to a thick, rich concentrate. Tomato puree consists of tomatoes that have been cooked briefly and strained, resulting in a thick liquid. Leading global companies include Unilever, ConAgra, Círio and Del Monte.

▶ **Other Sauces, Dressings and Condiments**

Any other types of sauces, dressings and condiments which do not match the definitions detailed above. Product types include: Wasabi powder, non-recipe purees, spice pastes (e.g. garlic purees/pastes), herb purees, dehydrated recipe batter/coating (used for cooking, e.g. deep frying, grilling, baking), dry recipe seasoning mixes (i.e., fajita spice mix). Tahini is also included here. Note that plain, dried breadcrumbs used for frying are to be excluded.

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

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