



Asian Inspirations

Trendy Flavours for Mayonnaise

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Table Sauces in the Spotlight

Interest in condiments and sauces continues to grow as consumers look to customize the heat or flavour intensity of the foods they regularly enjoy. And though many consumers are willing to explore all types of sensory experiences, they tend to gravitate to a familiar base such as ketchup or mayonnaise layered with intriguing flavours.

“Condiments and sauces are the fashion accessories of the culinary world, and today more than ever they are a necessary part of the ensemble as diners seek enhanced food experiences and more global flavours, especially in their home kitchens.”

Kimberly Egan, chief executive officer
Center for Culinary Development (C.C.D.), San Francisco

Market Size **Table Sauces** // Europe

Retail Value RSP | € mn | Current Prices | Fixed 2012 Exchange Rates

	Geographies	2009	2010	2011	2012	2013	2014	2015	2016	2017
1	Russia	1.478,7	1.614,2	1.784,3	1.926,9	2.080,4	2.222,9	2.371,6	2.526,8	2.682,6
2	Germany	1.030,3	1.020,0	1.024,2	1.047,7	1.078,1	1.102,9	1.130,5	1.156,9	1.172,1
3	United Kingdom	803,8	833,8	870,9	912,1	953,7	996,5	1.040,7	1.085,4	1.132,3
4	France	663,4	681,9	710,4	733,6	751,9	769,1	788,3	808,6	827,2
5	Ukraine	242,0	251,4	301,5	382,5	416,8	448,2	479,7	517,0	552,0
6	Poland	271,9	282,7	294,5	307,0	319,3	332,2	345,6	359,1	373,1
7	Spain	284,6	292,6	298,6	303,2	307,7	312,9	319,7	327,7	337,5
8	Netherlands	247,8	249,6	251,7	258,0	264,5	270,9	277,3	283,5	289,8
9	Italy	204,5	205,9	211,5	215,0	219,2	225,2	233,2	243,0	251,8
10	Sweden	184,9	189,4	194,5	200,8	208,0	214,0	219,8	226,1	231,5
11	Austria	172,5	177,4	184,8	194,4	204,6	214,9	225,5	236,5	247,7
12	Norway	163,4	168,8	173,3	178,8	182,7	188,3	194,8	202,1	209,7
13	Denmark	153,2	155,9	158,0	159,9	162,0	164,6	167,5	170,4	173,4
14	Turkey	109,7	118,0	131,7	149,3	165,5	183,0	201,8	221,5	242,0
15	Czech Republic	121,9	123,9	127,1	130,6	133,4	134,5	135,3	136,2	137,5
16	Finland	92,5	90,7	93,5	96,9	99,7	102,3	104,8	107,2	109,8
17	Portugal	39,7	40,7	40,9	40,6	40,5	41,0	41,6	42,5	43,5
18	Romania	18,1	18,5	19,0	19,4	20,0	20,7	21,6	22,5	23,5

Market Size **Mayonnaise** // Europe



Retail Value RSP | € mn | Current Prices | Fixed 2012 Exchange Rates

	Geographies	2009	2010	2011	2012	2013	2014	2015	2016	2017
1	Russia	985,2	1.063,0	1.167,8	1.252,5	1.334,2	1.413,3	1.498,0	1.586,3	1.677,9
2	Ukraine	179,8	185,9	227,8	295,4	318,6	337,8	356,7	378,0	401,1
3	France	171,5	169,8	174,9	179,3	184,7	187,9	191,0	193,7	197,5
4	United Kingdom	145,9	149,3	153,7	158,5	164,1	170,1	176,6	183,4	190,6
5	Spain	148,1	151,6	153,9	155,5	156,8	158,5	161,2	164,7	169,1
6	Germany	145,7	148,0	149,6	152,3	154,9	157,7	160,7	163,8	167,2
7	Poland	121,7	123,5	125,6	127,6	129,6	131,9	134,5	137,4	140,5
8	Italy	125,9	123,3	125,1	125,3	125,3	126,8	129,6	134,1	137,7
9	Austria	64,3	64,9	67,2	69,8	72,8	75,6	78,5	81,3	84,0
10	Norway	47,9	49,7	51,4	53,4	55,0	56,9	59,1	61,5	63,9
11	Turkey	29,8	33,6	39,7	47,1	54,4	62,2	70,8	79,8	89,0
12	Netherlands	33,0	33,7	34,6	35,5	36,3	37,1	37,8	38,3	38,9
13	Czech Republic	21,4	21,4	21,6	21,9	22,0	22,1	22,1	22,1	22,3
14	Sweden	20,1	20,4	20,9	21,5	22,1	22,8	23,4	24,1	24,7
15	Portugal	16,9	17,4	17,5	17,3	17,2	17,4	17,7	18,0	18,4
16	Denmark	16,6	16,7	16,9	17,0	17,2	17,5	17,8	18,2	18,6
17	Finland	6,7	6,4	6,6	6,9	7,0	7,2	7,3	7,5	7,6
18	Romania	0,8	0,8	0,9	0,9	0,9	0,9	1,0	1,0	1,1

Market Size **Mayonnaise** // Europe

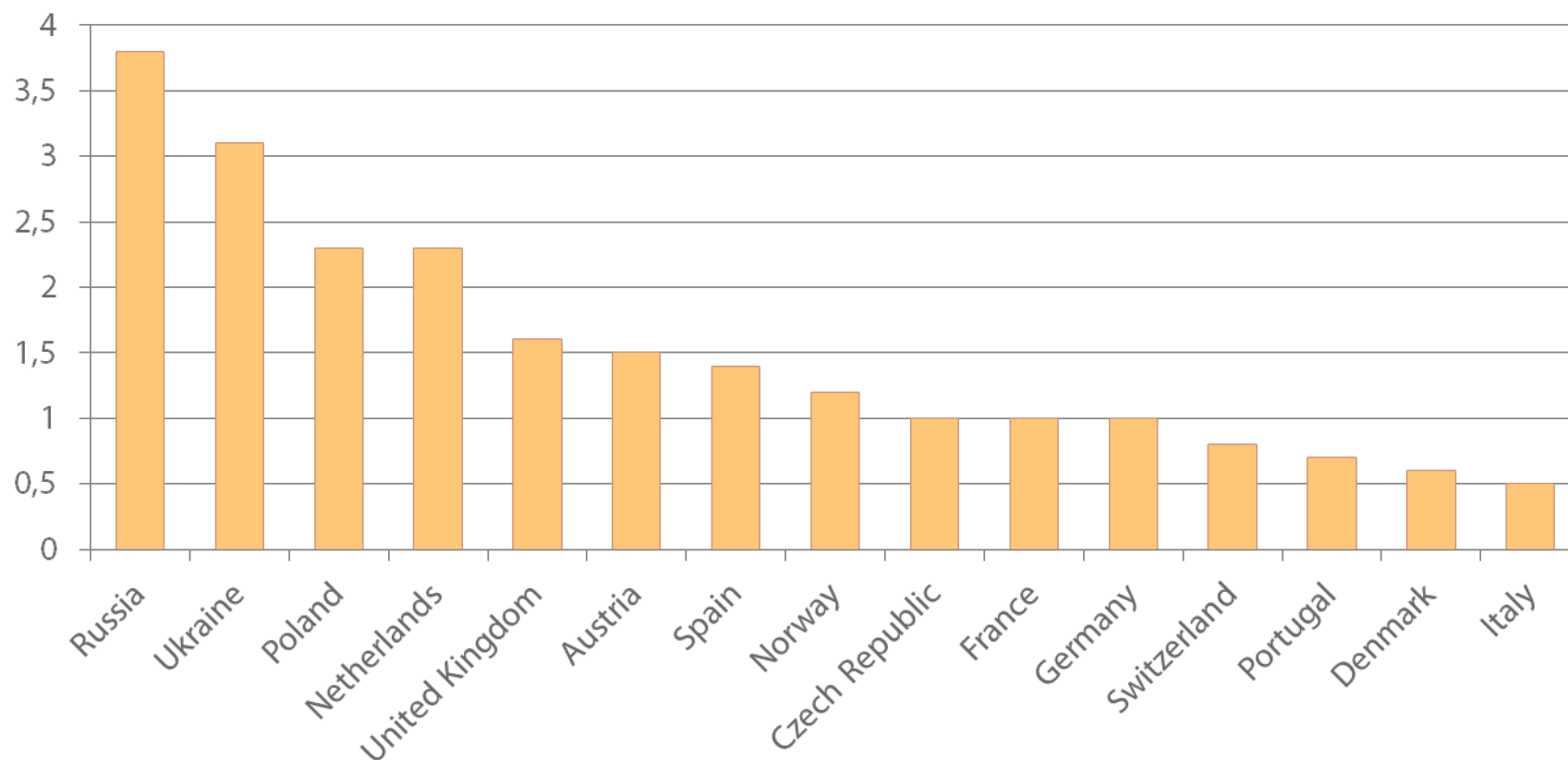


Retail Volume l`000 tonnes

	Geographies	2009	2010	2011	2012	2013	2014	2015	2016	2017
1	Russia	436,4	440,7	446,5	453,2	459,0	463,3	467,2	470,6	473,4
2	Ukraine	118,7	120,2	122,0	124,0	123,9	122,4	123,2	124,4	122,1
3	Germany	68,6	68,7	68,5	66,4	65,7	65,1	64,5	64,0	63,5
4	Poland	61,6	61,3	60,8	60,1	59,4	58,6	57,7	56,7	55,7
5	France	46,0	46,1	48,1	49,7	51,7	53,1	54,2	55,3	55,3
6	Spain	44,3	45,1	45,2	45,1	45,1	45,0	45,0	45,2	45,6
7	United Kingdom	30,0	30,3	30,8	30,8	31,2	31,6	31,9	32,1	32,7
8	Italy	25,3	25,3	25,3	25,0	24,6	24,4	24,3	24,5	24,8
9	Netherlands	15,5	15,6	15,6	15,6	15,5	15,4	15,3	15,1	15,0
10	Turkey	8,0	9,0	10,0	11,2	12,4	13,6	14,8	16,0	17,1
11	Austria	8,9	9,0	9,2	9,4	9,5	9,7	9,8	10,0	10,1
12	Czech Republic	6,2	6,1	6,1	6,0	5,9	5,9	5,8	5,8	5,8
13	Norway	4,6	4,8	5,0	5,3	5,5	5,7	5,9	6,2	6,4
14	Switzerland	4,8	4,8	4,9	4,9	4,9	4,9	4,9	4,9	5,0
15	Portugal	4,7	4,8	4,7	4,5	4,4	4,4	4,4	4,4	4,4
16	Sweden	3,4	3,4	3,4	3,5	3,5	3,5	3,5	3,5	3,5
17	Denmark	3,2	3,2	3,1	2,7	2,7	2,7	2,7	2,7	2,7
18	Finland	1,3	1,3	1,3	1,3	1,3	1,3	1,3	1,3	1,3

Market Size // Volume per Capita // Global

Total Volume for Mayonnaise l kg per Capita 2012



Top Flavours for Mayonnaise

New Product Innovations, global, March 2012 – March 2013

Top flavour:



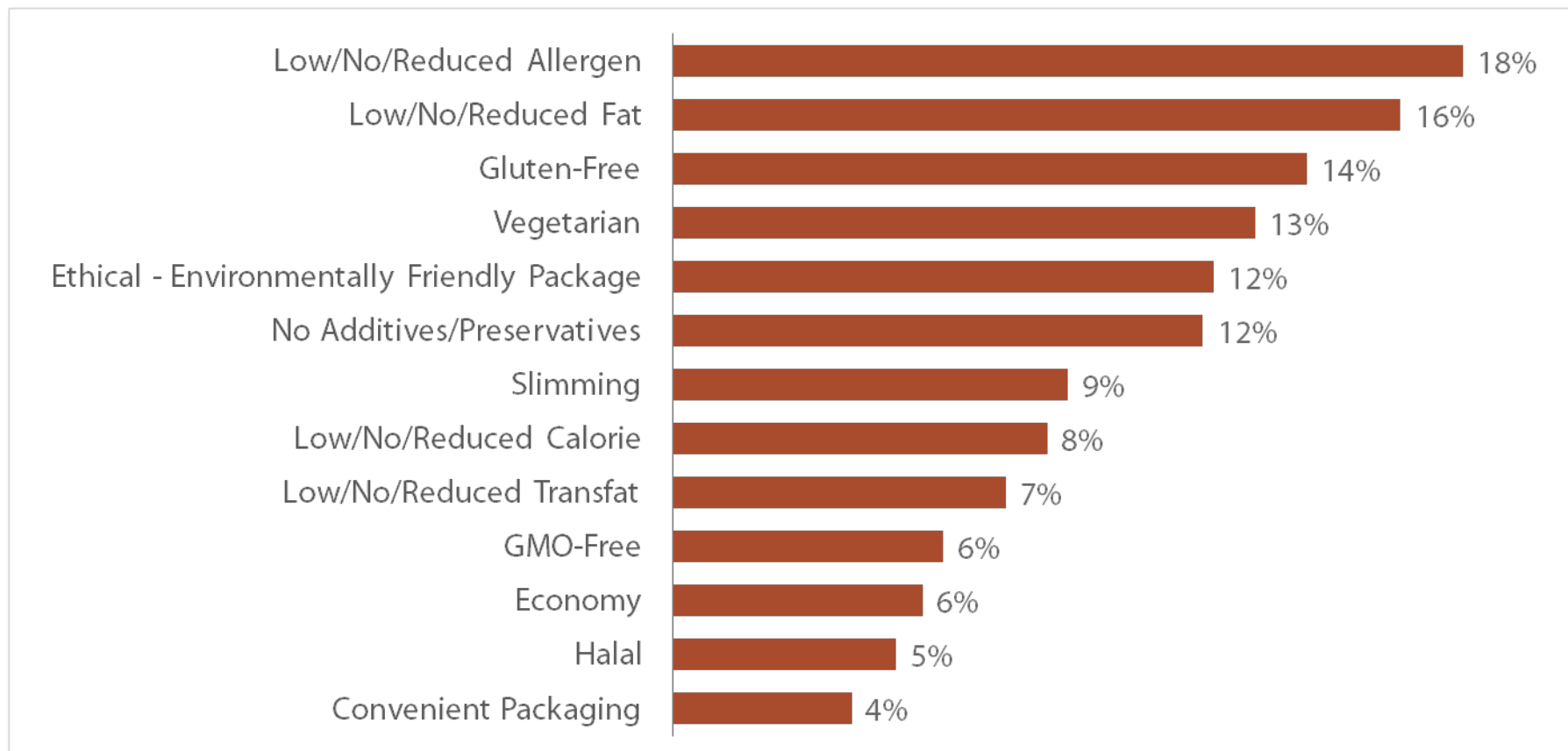
Lemon

Other popular flavours for mayonnaise:

- Garlic
- Dijon Mustard/Mustard
- Spice/Spicy
- Wasabi
- Chili/Chilli Pepper
- Caesar
- Provençal
- Honey & Mustard
- Pesto
- Cheese

Top Claims for Mayonnaise

New Product Innovations, global, March 2012 – March 2013



Source: Mintel GNPD

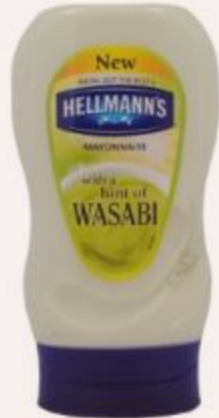
Market Trends for Mayonnaise

Mayonnaise is weaving its way onto the culinary scene with new flavour twists and variations to spice up the condiment's standing among other tasty sauces. The mayonnaise category has grown up, with a burgeoning of flavour variations and an increase in presentation platforms.

Most popular and trendy mayonnaise flavours:

- **Spices:** garlic, saffron, cumin, red pepper, sage, curry, sesame, ginger, paprika, lemon pepper, peppercorns
- **Herbs:** basil/pesto, cilantro, fennel, rosemary, tarragon
- **Spicy/Peppers:** sriracha, chimichurri, ancho, jalapeno, red, sweet, poblano, chipotle
- **Fruits:** apple, avocado, lemon, mango, lime, cranberry, citrus
- **Vegetables:** sweet relish, watercress, scallions, capers, olives, horseradish, wasabi
- **Tomatoes:** sun-dried, roasted, smoked
- **Cheese:** blue, parmesan
- **Others:** dijon, sherry, honey, buffalo sauce, spicy, teriyaki sauce

Market Trends for Mayonnaise

Extra Light	Yogurt	Hot & Spicy	Premium
Lighter than Light Mayonnaise; Bramwells/Private Label (UK) The product is made with free range eggs, has only 3% fat and is suitable for vegetarians. 	Mayonnaise Style Sauce with Yogurt; Bella Parma (Italy) This mayo contains over 65% less fat than Bella Parma delicate mayonnaise. This sauce retails in a 250ml jar. 	Mayonnaise with a Hint of Wasabi; Hellman's (Europe) Hellmann's Mayonnaise with a Hint of Wasabi is now available. The vegetarian product retails in a 250ml pack. 	Fine Mayonnaise; Maille (Greece) Maille Fine Mayonnaise is a mild product which is said to be suitable for all kind of meals. The product retails in a 340ml glass jar. 



Asian Flavour Trends

Asian flavours are “hot” among consumers, reflecting changing appetites as well as larger shifts in world economics, politics, and cultural forces. Asian ingredients, flavour dynamics and culinary strategies will collectively bring unprecedented change to food products over the next decade and beyond.

Asian Flavour Trends

An explosion of Asian ingredients – including key product items – has been vital in fueling interest in Asian flavours.

From Asian sauces to rice noodles, from Japanese-inspired soy foods to Chinese spices, consumers can now more easily find the special ingredients they need to create authentic Asian flavours.

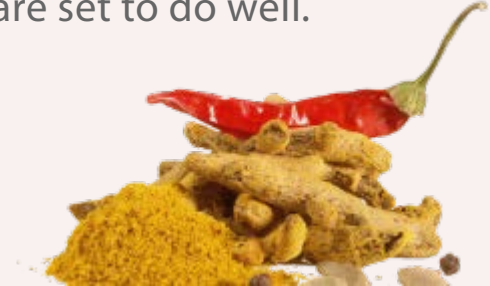
The emergence of the pursuit of health and wellness is giving another boost to Asian flavours. Many Asian culinary traditions, ingredients, and ideas are perceived as more healthful than others.

Asian is probably the easiest type of ethnic cuisine to introduce with sauces and ingredients.

Source: Mintel GNPD



Asian Flavour Trends – Table Sauces

Spicy & Exotic	Wasabi	Asian Flavours
Consumers are increasingly looking for hotter, spicier and more exotic flavours from table sauce brands. Traditional flavours are in decline and established brands, such as Heinz, are looking to hot sauce varieties. 	Wasabi is a frequently used flavouring ingredient which originated in the East and has picked up traction in the West. We now see Wasabi being used in a range of food categories from chocolate confectionery to table sauces. 	There is no better place to take inspiration around hot flavouring than from where the flavours originated – Asia Pacific. Asian flavours, styles and formats delivered with western brand & communication principles are set to do well. 

Market Insight: Asian Inspired Mayo // Europe

**Sandwich Shop Mayo;
Kraft // UK**
Twist of Lime,
Chipotle,
Hot & Spicy,
Horseradish-Dijon,
Garlic & Herb,
Steakhouse



**Mayonnaise with a Twist;
Branston (Premier Foods) // UK**

Lemon & Garlic,
Sweet Chili,
Hot Peri Peri,
Mustard & Onion,
Pesto

Market Insight: Asian Inspired Mayo // Europe

Chili Mayonnaise;
Knorr (Unilever) //
Germany
Chili Cream & Dip



Thai Mahal Curry-Mango
Sauce; Biggans (Sweden)

This mayo is made with mayonnaise, mango chutney & spices and recommended for serving with chicken and fish that is fried or grilled.



Mayonnaise
Sauces; Amora
(Unilever) // UK
Wasabi Sauce,
Samurai Sauce
(Garlic, Cayenne
Pepper)



Mayonnaise in a
Tube
Thomy (Nestlé) //
Germany
Chili Mayo,
Curry Mayo



Market Insight: Asian Inspired Mayo // Europe

Mayonnaise Varieties; Bénédicta (HJ Heinz) // France

Gourmet Sauces:
Lemon & Ginger,
Onion & Balsamic Vinegar,
Tomato & Chili



Mayonnaise Varieties; Bénédicta (HJ Heinz) // France

Sauces: Bearnaise, Madagascar Pepper, Burgundy,
Tartar, American, Cocktail, Rouille (Saffron, Cayenne
Pepper), Aioli, Sauce
for Potatoes



Market Insight: Asian Inspired Ketchup // USA

Inspiration for how to execute and deliver eastern flavours to a western audience may come from looking at new product innovation across the North American region where hot/spicy/exotic flavours are also witnessing growth.

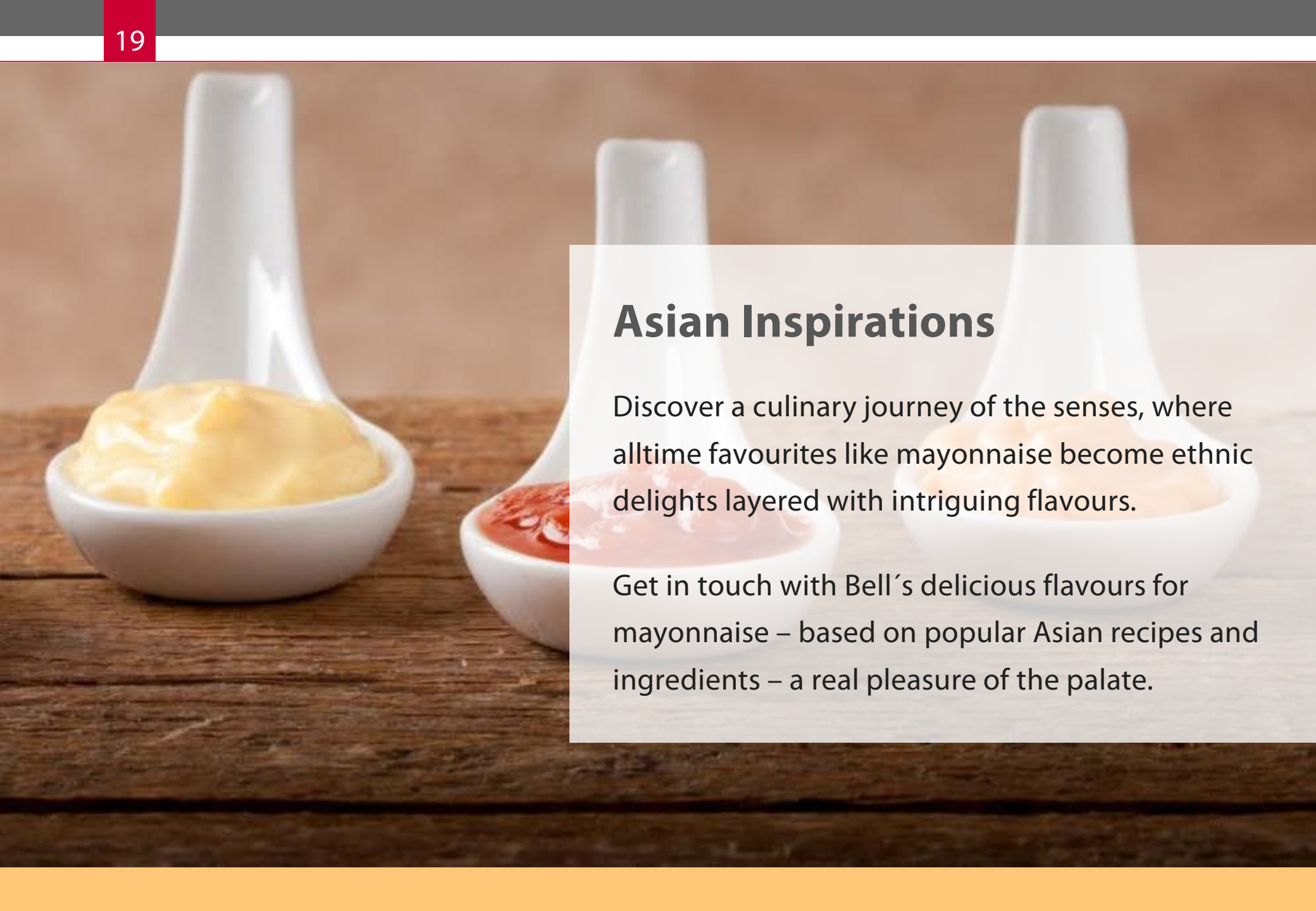
Heinz Deli Mayo
Caramelized Onion, Roasted
Garlic, A Hint of Chilli



Tiger Tiger
Wasabi Mayonnaise, Garlic
Mayonnaise, Tikka Mayonnaise,
Sweet Chili Mayonnaise

Best Foods
(Hellman's/Unilever)
Mayonnaise with Lime Juice





Asian Inspirations

Discover a culinary journey of the senses, where alltime favourites like mayonnaise become ethnic delights layered with intriguing flavours.

Get in touch with Bell's delicious flavours for mayonnaise – based on popular Asian recipes and ingredients – a real pleasure of the palate.

Application Recipe Mayonnaise

Base: Mayonnaise 50% Fat, cold Method, Sunflower Oil

Ingredients:

Oil	50,0 kg
Water	39,4 kg
Vinegar (9% acid)	3,5 kg
Sugar	3,0 kg
Ultra Tex 2000*	2,3 kg
Salt	1,2 kg
N-Creamer 46*	0,6 kg
Total	100,00 kg

*Ingredion™

pH-value: 4,0 (+/- 0,5)

Preparation:

1. Mix dry ingredients except Ultra Tex 2000. Stir them in water until they are well combined.
2. Disperse Ultra-Tex 2000 in triple amount of oil.
3. While stirring the water mixture constantly, first slowly add oil then Ultra Tex 2000 mixture and vinegar.
4. Emulsify by stirring vigorously.
5. Add Bell's flavours as recommended.

We recommend to add sodium benzoate and/or potassium sorbate as preservative.

1. ASIAN BASIL

0497733 Asian Basil Flavour

Declaration: natural flavouring

Dosage: 420 g : 100 kg

Parsley leaves, dried

Dosage: 50 g : 100 kg

A harmonic blend of typical Asian basil creates this traditional and simply delicious mayonnaise with a fine peppery licorice taste.



2. ASIA WOK

0496684 Wok Flavour, os.

Declaration: natural flavouring

Dosage: 450 g : 100 kg

Turmeric Powder

Dosage: 40 g : 100 kg

This aromatic mayonnaise delivers a sophisticated and slightly hot taste of pepper, ginger and lemongrass.



3. TANDOORI, GINGER & GARLIC



0496975 Tandoori Flavour

Declaration: natural flavouring

Dosage: 300 g : 100 kg

0490121 Ginger/Garlic Flavour

Declaration: natural flavouring

Dosage: 180 g : 100 kg

Onion Powder - Dosage: 30 g : 100 kg

Instant Caramel Powder - Dosage: 50 g : 100 kg

A typical Asian touch: garlic and ginger combined with coriander and cinnamon.



4. GREEN CURRY

0497173 Green Curry Flavour, hot, os.

Declaration: natural flavouring

Dosage: 360 g : 100 kg

Colours: E104/E133

Dosage: 40 g : 100 kg

Turmeric Powder

Dosage: 40 g : 100 kg

This seasoning features curry, coriander, cumin and nutmeg packed with a hint of exotic spiciness.



5. CORIANDER, CHILI & LIME



0497564 Coriander Leaf Flavour, os.

Declaration: natural flavouring

Dosage: 40 g : 100 kg

0497458 Chili & Lime Flavour

Declaration: natural flavouring

Dosage: 140 g : 100 kg

Garlic Powder - Dosage: 50 g : 100 kg

Parsley Leaves, dried - Dosage: 40 g : 100 kg

Paprika Powder - Dosage: 20 g : 100 kg

A fresh, aromatic and slightly hot mayonnaise!



6. SUSHI DIP

0497724 Sushi Dip Flavour

Declaration: natural flavouring

Dosage: 450 g : 100 kg

Colours: E104/E133

Dosage: 40 g : 100 kg

The aromatic combination of Wasabi, slightly sharp ginger and citric notes creates a deliciously hot mayonnaise flavour.



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