



Simple Indulgence

Natural Flavour Creations for delicious Pasta Sauces

Content

Global Pasta Sauce Market

Market Trends for Pasta Sauces

Consumer Trends & Drivers

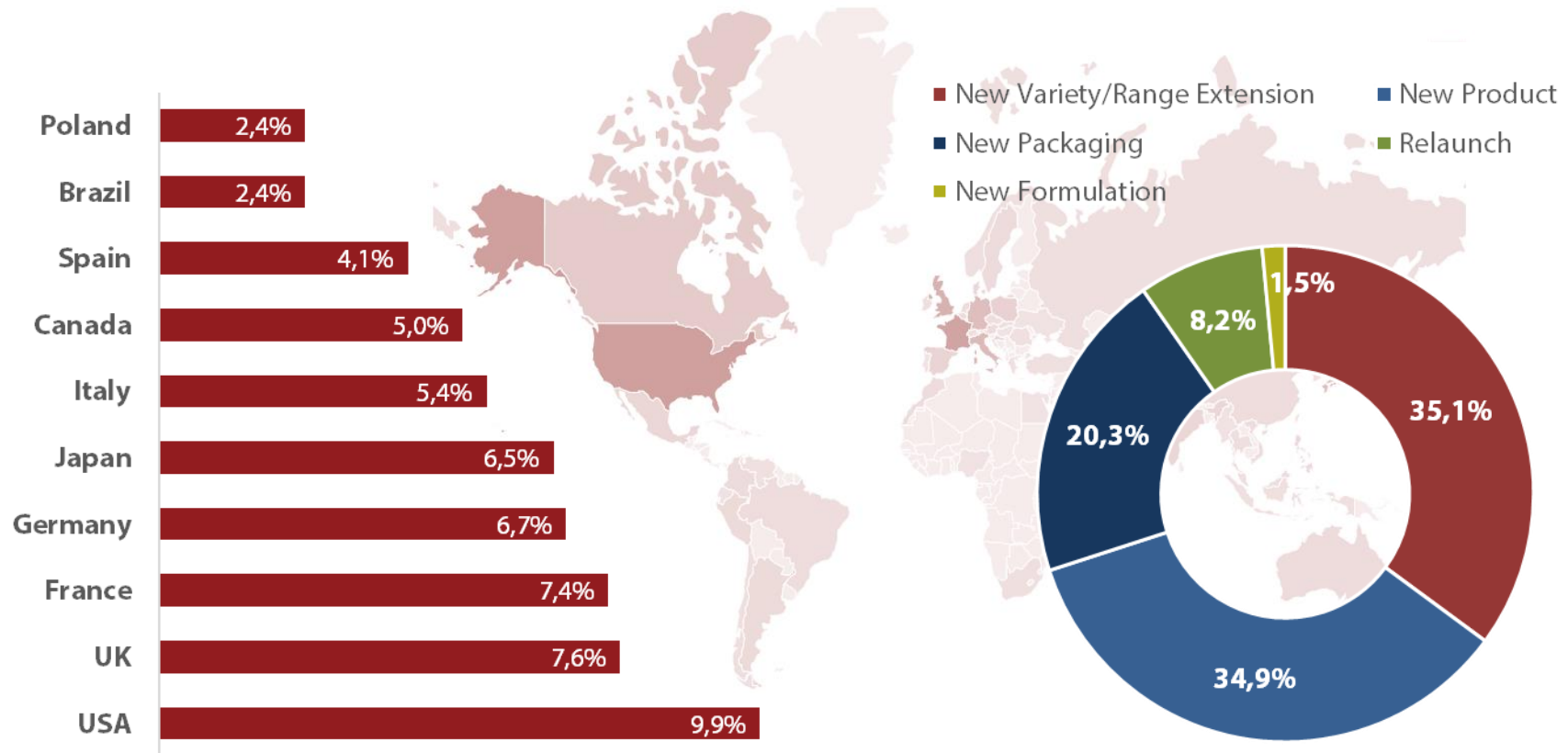
Market Insight

Top Flavours

Simple Indulgence – Natural Flavour Creations for delicious Pasta Sauces

Contact

Global Pasta Sauce Market



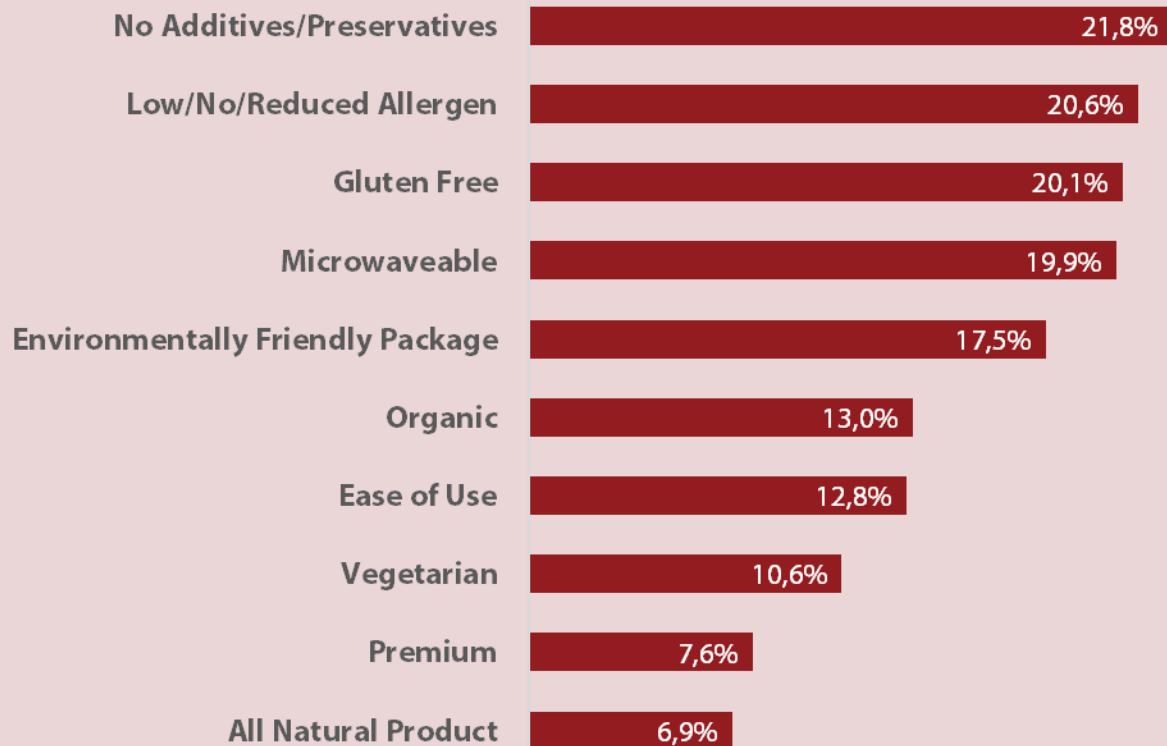
Global Pasta Sauce Launches – Top Countries, Jan 2015 – Sept 2017, % of launches

Global Pasta Sauce Launches – Launch Type, Jan 2015 – Sept 2017, % of launches

Global Pasta Sauce Market

Global Pasta Sauce Launches – Top 10 Claims,

Jan 2015 – Sept 2017, % of launches



Trending Claims ^②

Top Growing Claims

1. Low/No/Reduced Fat (+600%)
2. Premium (+544.4%)
3. Low/No/Reduced Lactose (+200%)
4. Ethical - Human (+200%)
5. Low/No/Reduced Cholesterol (+150%)

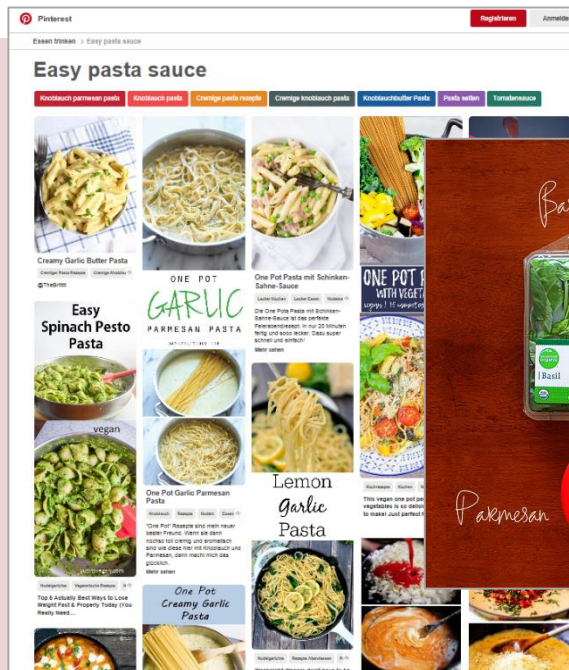
Declining Claims

1. Portionability (-100%)
2. Antioxidant (-100%)
3. Limited Edition (-60%)
4. Dairy Free (-50%)
5. Low/No/Reduced Transfat (-33.3%)

Market Trends for Pasta Sauces

Global pasta sauce brands innovate around premium and simple solutions

There is a growing consumer demand for **fresh, simple and unprocessed foods**. In response to this, market innovations have shifted towards gourmet and premium solutions that emphasise ingredient **provenance, simplicity** of recipes and care taken during the production method.



Targeting families and children

Families are a key demographic for cooking and pasta sauces. While brands try to target the entire family with milder varieties, new product activity shows that there are very few launches which overtly target children. This suggests an untapped opportunity for brands.



Market Trends for Pasta Sauces

Key Issues

Consumers point out 'natural' and 'purity' as important attributes in their ideal choice of sauces and will place more trust and value in brands that can convince them of the natural purity of the ingredients used in their recipes.

A rustic and less smooth texture and mimicking a 'home-made' sauce could further emphasise a product's natural and simple recipe.



The pasta sauce category is likely to see more brands enter the premium 'craft' segment to create a point of difference in the market, with products emphasising on artisan and small-scale quality (such as small batch/ kettle cooked).

Vegan friendly pasta sauces are slowly gaining popularity as attitudes to vegan lifestyles shift.

Consumer Trends & Drivers

Focus on Simplicity

Western brands focus on simplicity to drive growth in mature markets.

- In response to declining volumes in Western markets, brands have been moving towards gourmet and premium solutions through the emphasis on ingredient provenance and the overall simplicity of recipes.
- Simplicity can be communicated by letting sauce ingredients take the centre stage. This does not only elevate quality credentials but also improves the perception of taste.
- Brands can also address simplicity by featuring the word 'simple' in the branding to grab the attention of consumers.



Market Insight // Simplicity

Farmers' Market: Picked at Peak

Prego's Farmers' Market sauces launched by Campbell are one of the most high profile recent launches to put ingredient simplicity at the centre of its messaging. The new Prego line is said to use 'ingredients you'd find at your local farmers market – like vine-ripened tomatoes, garlic and basil – all picked at the peak of freshness'. **(US)**



Simply Traditional Pasta Sauce

Hunt's Simply Traditional Pasta Sauce is 100% natural homemade quality without all the prep, and comprises chunks of vine-ripened tomatoes simmered with diced onions, garlic and Italian-style herbs and spices to create a rich and flavourful sauce. **(US)**



Market Insight // Simplicity

Cool & Simple Tomato Sauce

Cool & Simple Tomato Sauce with extra virgin olive oil and basil is a flavourful sauce made of tomatoes, onions, and basil, which blends perfectly with a favourite pasta, meat or fish.
(Canada)



Crafted Tomato Basil Sauce

Portovino Cucina Tomato Basil Sauce is described as an authentic traditionally crafted sauce prepared in small batches. It is made using natural ingredients, contains no preservatives or gluten and retails in a 750 ml pack.
(Canada)



Tomato & Pancetta Pasta Sauce

Asda Extra Special Tomato & Pancetta Pasta Sauce is prepared with rich tomatoes, a splash of Italian red wine, sweet pancetta and a pinch of basil. It is free from artificial colours, flavours and hydrogenated fat.
(UK)



Consumer Trends & Drivers

Low Sugar and reduced Salt content

Health plays an important role in guiding consumers' decision making when looking to buy sauces; however, few brands make overt "low in" claims a feature on their new product launches.

- Should low/no/reduced sugar sauces prove to be successful, a focus on alternative sweeteners may become a feature for sauce developments next year.
- Although pasta sauce innovations carrying low/no/reduced sodium claims are rare in the European market, many of the leading manufacturers have been working towards reducing the salt content across their product ranges.



50% of UK cooking sauce consumers agree that nutritional content – such as sugar – is an important factor when choosing which cooking sauce to buy.

Market Insight // Low Sugar/Salt

No Added Sugar Sauces

Princes-owned brand Napolina launched a no added sugar range. These 'first-to-market' sauces contain only naturally occurring sugars and include classic flavours and a "hidden veg" variety as well as popular flavours such as Tomato and Chilli. **(UK)**



Pasta Sauce for Children

The new Heinz pasta sauce range which is described to be 'bursting with juicy tomatoes' contains no added salt, sugar, artificial colours or preservatives and is said to be perfect for the entire family. The smooth and flavoursome sauce retails in eye-catching yellow cartoon character packaging with a resealable lid and a pourer designed to aid portion control. **(UK)**



Market Insight // Low Sugar/Salt

Fried Tomato Sauce

Eroski Sannia Fried Tomato Sauce contains sunflower oil and is free from added salt and sugar. **(Spain)**



Organic Tomato Pulp

Léa Nature Jardin Bio' Organic Tomato Pulp is free from added salt and is suitable for cooked dishes, pizzas and sauces. **(France)**



Salt Compliant Sauces

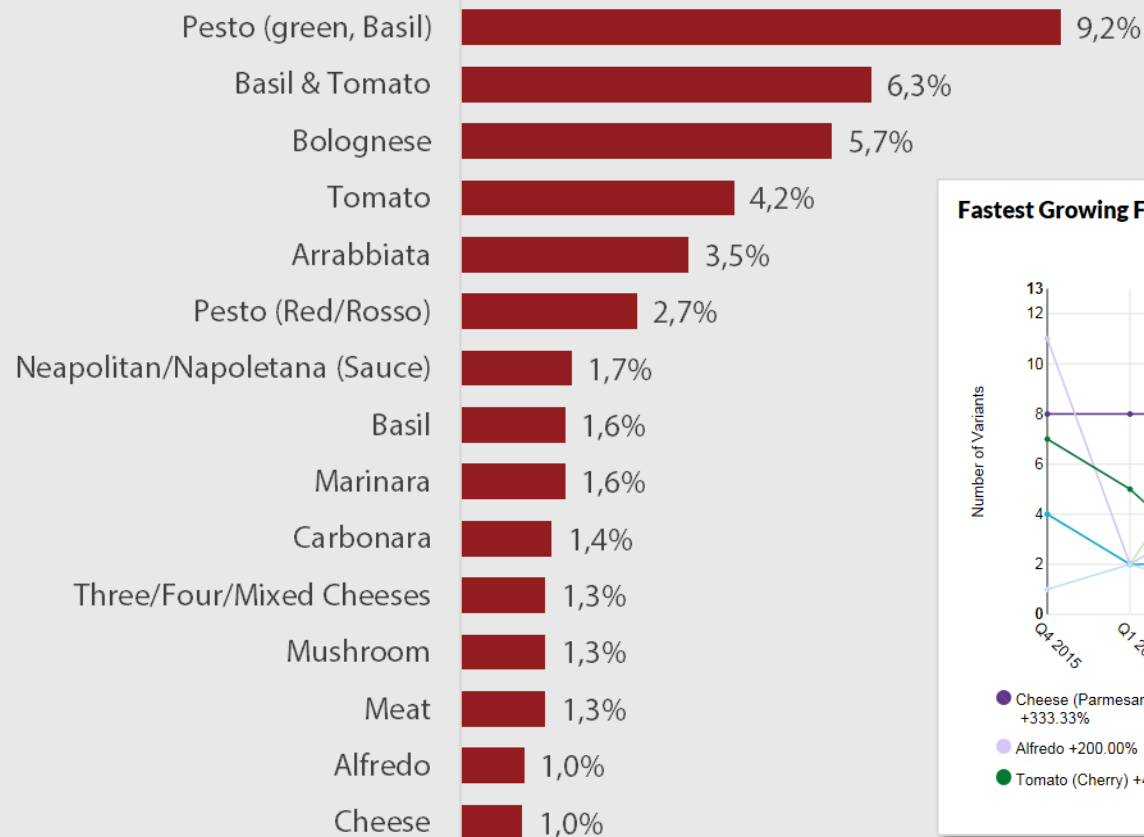
Homepride's new cooking and pasta sauce launches focus has been on the fact that their sauces contain no added sugar and no artificial colours.

They are also labelled "Salt Compliant 2017", to communicate that they meet the government's 2017 Salt Reduction target. **(UK)**

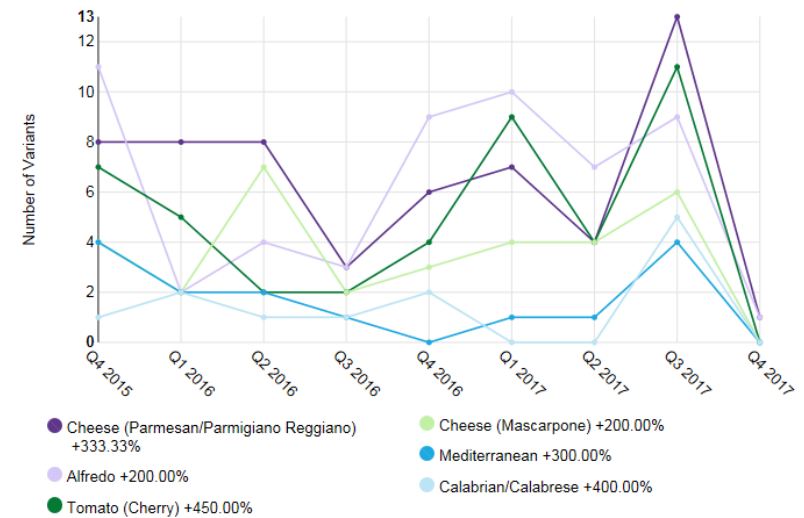


Consumer Trends & Drivers

Top flavours for pasta sauces, Jan 2015 – Sept 2017 (global, 4.300 NPD in total)



Fastest Growing Flavours



Simple Indulgence...

Everyone likes pasta, but even the best pasta is nothing without the perfect sauce...

Therefore Bell has created an indulging and unique flavour range for pasta sauces, providing a simple, but delicious taste experience for any type of pasta meal. Get in touch with taste...



Bell's Flavour Range for Pasta Sauces

- ✓ Unique, full and distinctive flavour profiles to **round off pasta sauces**, or to deliver a special **depth of taste and a constant quality**
- ✓ Complex flavour profiles, designed to deliver **excellent results in various sauce applications** (e.g. pasta sauces or other tomato-based sauces)
- ✓ All flavours have been **developed for a heat-stable processing**
- ✓ Aromatic, natural and authentic taste, inspired by **classic flavour directions and new flavour trends**
- ✓ Innovative inspirations for extending your product portfolio and **invigorating the marketplace**
- ✓ All flavours are **in line with today's consumer demands**: natural, vegetarian/vegan, and allergen-free

Application Recipe Pasta Sauces

Ingredients:

Tomato pulp, thin	84,00 kg
Onion cubes, small	5,00 kg
Sugar	4,00 kg
Tomate paste, double concentrated	3,00 kg
Sunflower oil	1,50 kg
Salt	1,20 kg
Food starch, HPC	1,00 kg
Parsley, shredded and dried	0,20 kg
Citric acid powder, E330	0,10 kg

Total	100,00 kg
--------------	------------------

Preparation Recommendation:

1. Weigh all ingredients.
2. Mix all ingredients and boil together in a pot for about 1 minute.
3. Add Bell's flavours as recommended.
4. Hot-fill sauce into glasses and seal properly.
5. Sterilize glasses within a convectomat at a temperature of 123°C and a humidity of 100%.

1. Tomato Paste (Basic Taste Booster)

4500206

Tomato Paste Flavour

Dosage:

0,1 : 100

Declaration:

nat. Flavouring, halal conform

An aromatic and slightly flowery blend of fruity and fresh tomatoes, the perfect base for rounding off pasta sauces...



2. Sweet Paprika

0490644 **Paprika Flavour**

Dosage: 0,4 : 100

Declaration: nat. Paprika Flavouring, halal conform

The sweetness of cooked red paprika notes delivers a special vegetable taste. A perfect pairing for fruity pasta sauce...



3. Italian Herbs

0490834 **Herbs Flavour, Italian Type**

Dosage: 0,1 : 100

Declaration: nat. Flavouring, halal conform

A harmonic interaction of fresh herbs and a distinctive oregano note makes any pasta sauce an ultimate taste experience.



4. Fresh Herbs

4500215

Herb Flavour

Dosage: 0,2 : 100

Declaration: nat. Flavouring, halal conform

Fresh, herbaceous notes of various home-grown garden herbs with a touch of basil deliver a unique taste profile for refining any type of pasta sauce.



5. Italian Hard Cheese

0490387 **Italian Hard Cheese P-Flavour**

Dosage: 0,05 : 100

Declaration: nat. Flavouring

This deliciously aromatic pasta sauce is infused with a typically ripe parmesan cheese flavour.



6. Bolognese (Meat)

4500297

Meat Flavour

Dosage: 0,2 : 100

Declaration: nat. Flavouring, halal conform

One of the classics, when it comes to pasta sauce:
Meaty, slightly smoky notes deliver a perfect indulgence and act as a taste booster for bolognese sauces.



7. Pure Smoke

4500151 **Smoke Flavour, fatty**

Dosage: 0,15 : 100

Declaration: nat. Flavouring, halal conform

Bell's grilled and meaty smoke flavour is made to create an exciting and piquant-aromatic pasta sauce experience...



8. Chili & Paprika

0496683

Chili Flavour

Dosage:

0,05 : 100

Declaration:

nat. Chili Flavouring with other
nat. Flavourings, halal conform

0490644

Paprika Flavour

Dosage:

0,4 : 100

Declaration:

nat. Paprika Flavouring, halal conform

The sweetness of paprika combined with hot chili notes – a truly fiery taste explosion – and a trendy taste variety for pasta sauces...



Contact

Bell Flavors & Fragrances
Schimmelstrasse 1
04205 Leipzig
Germany

Tel.: +49.341.9451.0
Fax: +49.341.941166.9
E-mail: info.marketing@bell-europe.com
Web/Newsletter: www.bell-europe.com

Agneta Hoffmann
Marketing Specialist Savoury
Tel.: +49.341.9451.1053
E-mail: a.hoffmann@bell-europe.com