

The Grocer

Focus On: Pasta & Pasta Sauces by Emma Sturgess (emma-sturgess@hotmail.co.uk)

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The Story

Despite more noise about gluten free and low carb diets, the pasta market is in rude health with value and volumes growing over the past year. But the price war is starting to take its toll, particularly in pasta sauces which suffered a value decline despite volumes increasing. To make matters worse, Brits are whipping up their own sauces from scratch, further impacting on the market. So, how are the category's biggest players looking to add value to the market? What are they doing to add some excitement to the sector?

Key themes:

Cooking trends in sauces: Pasta continues to outperform sauce as consumers continue to make their own sauces from scratch – it's worth noting that tomato-based cooking products such as canned tomatoes and puree have seen a combined volume growth over the past three years. How are retailers and brands capitalising on this? What does this mean for ready-made sauces? That being said, pasta sauces are still in volume growth. So, what's driving this?

Health: Manufacturers and brands are increasingly trying to make pasta healthy, with high protein, high-fibre, ancient grains and even aphrodisiac varieties all hitting the market. So, what's next? And, how has this sector performed over the past year?

Fresh v ambient: Fresh pasta is growing ahead of overall pasta. Why is this? Branded filled has been stealing sales from own label due to deep cut promotions. Is this sustainable in the long term? What can branded do to win sales back?

Sub-sectors: We'll be analysing everything from formats (pouches, jars and tubs) to popular pasta styles. For example, Fusilli (dry pasta) sales are soaring for the second year in a row. What is driving this? Meanwhile, lasagne and macaroni are struggling. Which trends are driving this?

Retail split: As with many areas in grocery, the discounters are seeing huge growth in pasta and pasta sauces. How come? How have their ranges changed over the past year to reflect current trends? All is not lost for the big four, however. We investigate how their ranges have changed over the past year as well. How are they warding off the discounters?

Own label v brands: Own label dominates pasta but brands are fighting back with sales up compared to a decline in own label. What are brands doing right? Notably, there's been a price increase in branded. Why? Are they pushing premium lines? What are consumers willing to pay more for?

Prices and promotions: This feature will investigate how big a part price promotions have played in the market over the past year. Retailers are pushing hard on cupboard staples, so how is this affecting pasta and pasta sauces? Which areas have seen the biggest changes and why?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth. Has there been much in the way of pasta advertising? And sauces?

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market. We will profile four of the most interesting new launches in a separate innovation panel.

The next big thing: What do the category's experts think will be the next big thing in pasta and pasta sauces? This feature will investigate in detail the food trends that are likely to shape new products over the coming 12 months.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?
- We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.