NEWS | FOOD

What Is Going On In The Condiments Aisle?

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Changing lifestyles are leading to changes in eating habits and preferences. This is expected to drive the growth of the condiments market, especially the use of sauces, herbs, spices and dressings in the coming years. Not only do condiments enhance the taste or flavour of a dish, they are also used to add some textural interest to food. But some condiments contain high levels of salt, fat, and sugar, which is cause for an alarm. This calls for greater scientific attention towards the development of healthier and natural options. Let's delve deeper into this.

The Indian condiments market is projected to grow at a CAGR of over 13 per cent, to reach $1.34 billion by 2024. This anticipated growth in the market can be attributed to increasing cross-cultural interaction, inclination towards consumption of western cuisines, and a growing number of modern retail outlets offering price and convenience advantages to the customers.

At present, the Indian condiments market is controlled by a few major players, namely Nestle, Field Fresh Foods (Del Monte), Hindustan Unilever, Cremica Food Industries, Dr. Oetker, and Kraft Heinz which are offering sauces, dressings, pickles, and chutneys.

According to market advisory firm Sathguru Management Consultants, significant investments have been made in the last five years in startups like Wingreens and Veeba Foods in the dip, sauces and dressings category. Moreover, many startups are now venturing into plant-based versions of sauces and dips.

An exciting market

In addition, the Indian market has seen the entry of new international players in the last few months, with novel offerings, particularly in the sauces segment. For instance, Japan-based Kikkoman Corporation has recently launched soy sauce and oyster sauce in the country. Brewed naturally using ingredients like soybeans, wheat, salt and water, Kikkoman's soy sauce can be used with multiple Asian cuisines.

"Our sales volume is currently 516.4 billion yen, and the brand has an over 350 year-old history of producing soy sauce. Given these facts, there are no real competitors as Kikkoman Soy Sauce is truly unique, and is different from chemically produced soy sauces. We are hoping to become the most authentic brand in the Indian Chinese category in India's food service sector.

With the growing popularity of Indian Chinese cuisine, there will be a greater chance for our product to further penetrate the market and Indian households'', says **Harry Hakuei Kosato, Director- Kikkoman India and India Representative at Kikkoman Corporation**.

On the other hand, Nippon Global, an olive oil production company based out of Spain, and KIZ foods, a pickled and cocktail onions producer in Bhavnagar, have announced their joint venture as the Holy Sauce entity last year. Likewise, Australian food group Simplot Australia launched its pasta and pizza sauces in India in 2021 despite the pandemic.

Desi and foreign flavours

Exotic sauces are jostling for the top spot with the good old tomato ketchup, Indians have been so fond of. The new varieties, in unique flavours such as chilli, garlic chilli, dark soy, chilli vinegar, are gaining momentum in the Indian market across the food service and retail segments .

According to **Akshay Bector, Chairman and Managing Director, Cremica Food Industries**, “Though tomato ketchup, tomato sauces, Indian ethnic chutneys in pudina and imli flavours, mustard, and mayo remain on the top of the list of most-used sauces overall, when dining at restaurants or in other food establishments, an increasing number of people are searching for specific sauces with distinctive flavours. With the introduction of our new products such as Chipotle Sauce, Sriracha Sauce, Piri Piri Sauce, Tomato Ketchup, Honey Mustard, Sweet Onion Sauce, Thai Sweet Chili Sauce, Barbeque Sauce, we would like to capture and become global leaders in the cold condiment market.”

Apart from exotic sauces, many newer versions of chutneys are doing the rounds in the market. Mother’s Recipe, a leading player in this segment, has strengthened its chutney range - Lemon Chutney, Dhania Pudina Chutney, and Tomato Chutney with multiple launches in the last few months.

“With earlier variants introduced, we analysed the market and saw huge demand from customers in the chutney category. We recognised that in the crisis situation of the pandemic, all of us were restricted to our homes and were sceptical about eating outside and consumers prefer home-cooked food”, says **Sanjana Desai, Executive Director, Mother’s Recipe**

(Desai Foods).

Pickles are another favourite food accompaniment in the Indian household. And just like other condiments, new varieties are emerging here as well. In fact, the overall size of the pickles market in India is pegged close to Rs 1500 crore and has been growing at 6 to 8 per cent CAGR.

Nilon's, a market leader in the pickles category, recently expanded its portfolio with mango, green chili, and mixed pickle variants focusing on Rajasthani flavours. **Dipak Sanghvi, Managing Director, Nilon's** says, "We have seen a shift in consumption patterns. We witnessed a major change in the last few years. While earlier pickles were considered a side dish, they have now been integrated into the main menu in most households. Also, people at home are experimenting more with their food, and our objective is to address those needs."

A touch of Gujarati flavours is being pushed by Ahmedabad-based Indian Traditional Foods (ITF) under its brands Gujjuben and YO'S Kitchen Sandwich pickles. Under YO's Kitchen Sandwich Pickles, ITF is introducing the first ever mix of jam and pickles to attract all generations.

Innovation in packaging

Packaging is one major aspect being explored by condiment manufacturers across the globe. Beyond the colour of the product and its packaging, what is also really important is the shape and form of the packaging. Many brands in the marketplace are experimenting with distinctive shapes for their product packaging lately to attract attention.

According to a report by Mintel, brands are positioning table and cooking sauces in small squeezable tubes for aspiring cooks and those who occasionally cook. Tubes can also reduce the food waste that might be generated during the course of experimenting with different sauces.

As a new packaging format, the squeezable tube can play a role in revitalising the brand image of different condiments and ensuring they appeal to the next generation of consumers.

Kraft Heinz is currently experimenting with the launch of Packet Roller, a ketchup bottle-shaped gadget that allows users to squeeze the most out of a condiment packet. Simultaneously, the brand has announced that their iconic ketchup bottles could look very different in the future as

they plan to introduce a paper version of their packaging.

On the other hand, Berry Global has launched a new range of hot fill sauce bottles that feature a curved, top-down design for enhanced dispensing and consumer convenience.

Premium UK condiment maker, Stokes Sauces, has announced the launch of a squeezy sauce bottle which is made entirely from recycled plastic. Stokes is thought to be the first condiment brand to launch a 100 per cent recycled plastic bottle in the UK.

Addressing health concerns?

Many condiments are not particularly healthy, containing large amounts of sugar (ketchup) and/or salt (soy sauce). In fact, just a single tablespoon of mayonnaise contains around 11 g of fat, 100 calories, and 85 mg of sodium. But this is not commonly known, and may not figure in people's calculations of how healthy a dish or meal is. Thus, there is a need to carefully understand the presence of individual ingredients in these condiments.

For example, commercial soy sauce contains a high amount of phytates that block the absorption of minerals in our body. In addition, extra monosodium glutamate (MSG) gets added to enhance the flavour of soy sauce which can lead to metabolic disorders, have harmful effects on reproductive organs, cause obesity, and is neurotoxic.

Likewise, ketchup is high in high fructose corn syrup. This is used to allow the ketchup to exit easily out of the bottle. Although there are brands that add "natural" flavouring, it is often made up of chemicals, and one of the main chemicals used is MSG.

Minus these ingredients in the ketchup bottle, the basic tomato sauce is better than raw tomatoes as cooking preserves a chemical called lycopene which boosts the probiotic effect and encourages the growth of healthy bacteria in the gut. Researchers have also examined the effects whole tomato extracts have on gastric cancer.

Before consumers learn about how the hidden ingredients in their favourite condiments can disrupt their healthy diets, big and small players should focus on making condiments with ingredients that are less processed and lower in calories. A few niche, artisanal brands - Circa Pickles, Maa’s Pickles, Wood Street Sauce, Not just hot, Maikaa Foods, are already bringing

healthy versions of condiments to the consumer. The addition of elements such as cardamom, turmeric, black pepper, chilli powder, basil, mint, pepper, ajwain, and curry leaf to the condiments is also increasing, with growing consumer awareness of their immunity-boosting properties. In the years ahead we are likely to see a push towards healthier versions of many popular condiments.

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