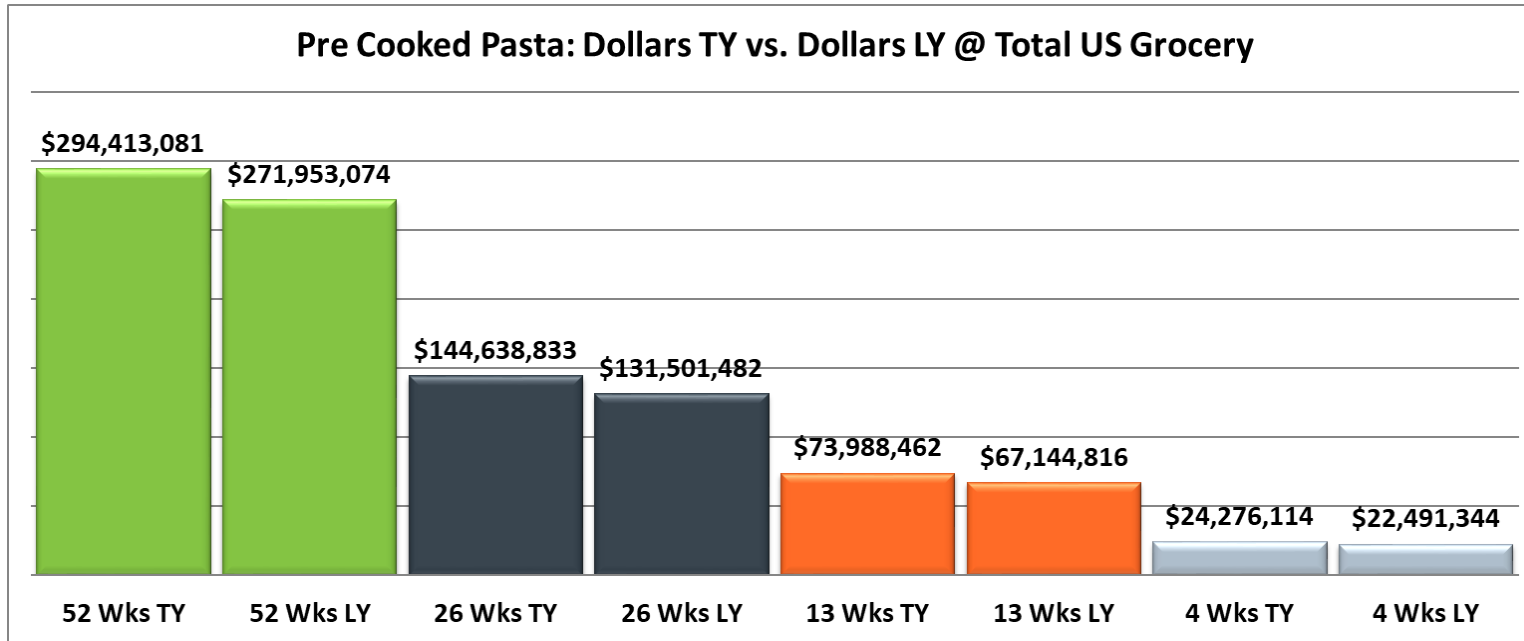
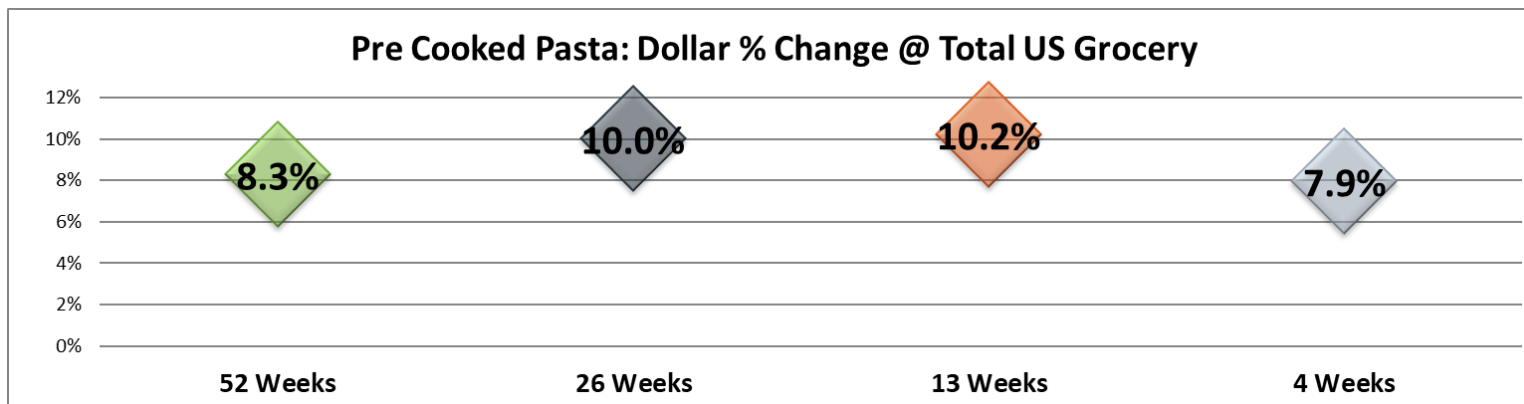


Pre Cooked Pasta Dollar Summary - Total US Grocery



- Pre Cooked Pasta is nearly a \$300 million category in the Total US Grocery Channel
- The category has strong growth, trending up at an increasing rate for all current time periods versus year ago
- The increasing desire of consumers to have fast, easy, yet wholesome foods provides an opportunity for this category to continue to grow



Pre Cooked Pasta Brand Rank - Total US Grocery

Pre Cooked Pasta Category Brand Rank - Total US Grocery - 52 Weeks Ending 2017-10-07

Rank	Brand Family	Dollars TY	Dollars LY	\$ Chg	\$ % Chg	% Share	% Cume	Units TY	Units LY	Unit Chg	U % Chg	% Share	% Cume	Avg Price
	Grand Total	\$294,413,081	\$271,953,074	\$22,460,007	↑ 8.3%	100.0%	100.0%	63,275,841	58,695,588	4,580,253	↑ 7.8%	100.0%	100.0%	\$4.65
1	BITONI	\$156,735,840	\$154,925,052	\$1,810,787	↑ 1.2%	53.2%	53.2%	33,099,788	32,707,969	391,819	↑ 1.2%	52.3%	52.3%	\$4.74
2	GIOVANNI RANA	\$73,552,877	\$48,553,229	\$24,999,648	↑ 51.5%	25.0%	78.2%	16,017,007	10,565,405	5,451,602	↑ 51.6%	25.3%	77.6%	\$4.59
3	CTL BR	\$27,622,737	\$28,188,394	-\$565,657	↓ -2.0%	9.4%	87.6%	6,451,821	6,524,445	-72,624	↓ -1.1%	10.2%	87.8%	\$4.28
4	PASTA PRIMA	\$15,661,065	\$18,347,274	-\$2,686,210	↓ -14.6%	5.3%	92.9%	3,487,251	4,166,492	-679,241	↓ -16.3%	5.5%	93.3%	\$4.49
5	MONTEREY GOURMET FOODS	\$3,710,169	\$4,377,069	-\$666,901	↓ -15.2%	1.3%	94.2%	943,891	1,247,597	-303,706	↓ -24.3%	1.5%	94.8%	\$3.93
6	THREE BRIDGES	\$3,367,993	\$4,296,769	-\$928,775	↓ -21.6%	1.1%	95.3%	685,931	926,790	-240,859	↓ -26.0%	1.1%	95.9%	\$4.91
7	O SOLE MIO	\$2,628,845	\$2,672,567	-\$43,722	↓ -1.6%	0.9%	96.2%	606,636	582,649	23,987	↑ 4.1%	1.0%	96.9%	\$4.33
8	LA PASTA	\$1,289,622	\$1,610,809	-\$321,186	↓ -19.9%	0.4%	96.7%	197,150	237,868	-40,718	↓ -17.1%	0.3%	97.2%	\$6.54
9	RP S PASTA	\$1,159,600	\$947,224	\$212,376	↑ 22.4%	0.4%	97.1%	232,226	196,389	35,837	↑ 18.2%	0.4%	97.5%	\$4.99
10	ANTICA PASTERIA	\$958,895	\$1,125,901	-\$167,006	↓ -14.8%	0.3%	97.4%	234,414	377,208	-142,794	↓ -37.9%	0.4%	97.9%	\$4.09
11	NUOVO	\$788,339	\$818,877	-\$30,537	↓ -3.7%	0.3%	97.6%	135,790	136,067	-277	↓ -0.2%	0.2%	98.1%	\$5.81
12	MARIN PASTA WORKS	\$723,592	\$767,129	-\$43,537	↓ -5.7%	0.2%	97.9%	110,095	116,605	-6,510	↓ -5.6%	0.2%	98.3%	\$6.57
13	BERTAGNI	\$703,544	\$772,441	-\$68,896	↓ -8.9%	0.2%	98.1%	106,329	114,723	-8,394	↓ -7.3%	0.2%	98.5%	\$6.62
14	PASTA BELLEZZA	\$691,099	\$72,603	\$618,496	↑ 851.9%	0.2%	98.4%	187,149	21,881	165,268	↑ 755.3%	0.3%	98.8%	\$3.69
15	ARTISOLA	\$531,220	\$	\$531,220		0.2%	98.5%	78,621	0	78,621		0.1%	98.9%	\$6.76
16	SANTA CRUZ PASTA FACTORY	\$481,398	\$582,197	-\$100,798	↓ -17.3%	0.2%	98.7%	80,977	93,262	-12,285	↓ -13.2%	0.1%	99.0%	\$5.94
17	PASTA ETC	\$387,788	\$360,161	\$27,626	↑ 7.7%	0.1%	98.8%	61,253	61,039	214	↑ 0.4%	0.1%	99.1%	\$6.33
18	CAPPELLO S	\$363,268	\$261,208	\$102,061	↑ 39.1%	0.1%	99.0%	34,983	25,210	9,773	↑ 38.8%	0.1%	99.2%	\$10.38
19	VITAMIA	\$327,111	\$338,470	-\$11,359	↓ -3.4%	0.1%	99.1%	43,427	44,897	-1,470	↓ -3.3%	0.1%	99.2%	\$7.53
20	SAPORE	\$277,129	\$220,018	\$57,111	↑ 26.0%	0.1%	99.2%	48,613	38,345	10,268	↑ 26.8%	0.1%	99.3%	\$5.70
21	MANINIS	\$276,012	\$133,362	\$142,650	↑ 107.0%	0.1%	99.3%	42,142	24,744	17,398	↑ 70.3%	0.1%	99.4%	\$6.55
22	THE PASTA SHOP	\$273,396	\$265,122	\$8,274	↑ 3.1%	0.1%	99.4%	25,345	26,272	-927	↓ -3.5%	0.0%	99.4%	\$10.79
23	HOME MAID	\$262,848	\$304,227	-\$41,379	↓ -13.6%	0.1%	99.4%	59,647	71,653	-12,006	↓ -16.8%	0.1%	99.5%	\$4.41
24	ANTONIO S	\$240,994	\$284,280	-\$43,285	↓ -15.2%	0.1%	99.5%	44,541	53,222	-8,681	↓ -16.3%	0.1%	99.6%	\$5.41
25	RAFFETTO S	\$210,107	\$4,284	\$205,823	↑ 4804.0%	0.1%	99.6%	40,595	1,097	39,498	↑ 3600.5%	0.1%	99.7%	\$5.18
26	I SAPORI DEL VALLO	\$187,697	\$165,852	\$21,845	↑ 13.2%	0.1%	99.7%	32,915	30,016	2,899	↑ 9.7%	0.1%	99.7%	\$5.70
27	WINE COUNTRY PASTA	\$170,094	\$511,450	-\$341,357	↓ -66.7%	0.1%	99.7%	25,050	77,907	-52,857	↓ -67.8%	0.0%	99.7%	\$6.79
28	NEW YORK RAVIOLI & PASTA CO	\$153,834	\$158,564	-\$4,730	↓ -3.0%	0.1%	99.8%	26,912	26,890	22	↑ 0.1%	0.0%	99.8%	\$5.72
29	ARTHURS	\$151,858	\$245,960	-\$94,102	↓ -38.3%	0.1%	99.8%	41,563	76,405	-34,842	↓ -45.6%	0.1%	99.9%	\$3.65
30	CUCINA FRESCA	\$145,664	\$144,372	\$1,293	↑ 0.9%	0.0%	99.9%	24,900	25,494	-594	↓ -2.3%	0.0%	99.9%	\$5.85
-	ALL OTHERS	\$378,444	\$498,208	-\$119,764	↓ -24.0%	0.1%	100.0%	68,879	97,047	-28,168	↓ -29.0%	0.1%	100.0%	\$5.49

- The category is dominated by Buitoni & Giovanni Rana, combined they are 78% of total category sales
- Top growing brands:
 - Giovanni, up 51.5% and \$25MM
 - RP's Pasta, up 22.4% and \$200K
 - Pasta Bellezza, up 852% and \$620K
- New Brands:
 - Pasta Bellezza (#14)
 - Artisola (#15)
 - Raffetto's (#25)

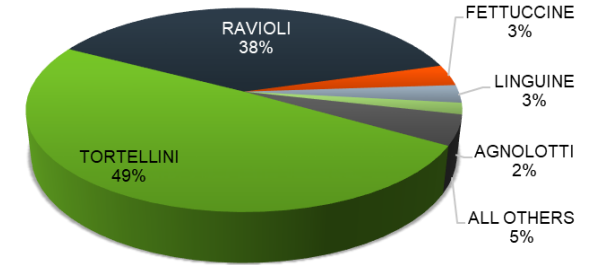
Pre Cooked Pasta - Pasta Type Insights - Total US Grocery

Recommended Types:

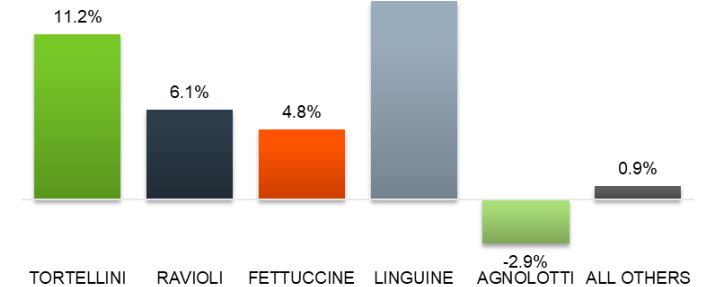
- Tortellini
- Fettuccine
- Linguine
- Gnocchi

Pre Cooked Pasta - Pasta Type Insights - Total US Grocery - 52 Weeks Ending 2017-10-07									
Rank	Pasta Type	Dollars TY	\$ Chg	\$ % Chg	% Share	Units TY	Unit Chg	U % Chg	% Share
	Grand Total	\$294,413,081	\$22,460,007	↑ 8.3%	100.0%	63,275,841	4,580,253	↑ 7.8%	100.0%
1	TORTELLINI	\$145,429,225	\$14,654,667	↑ 11.2%	49.4%	26,844,797	2,608,071	↑ 10.8%	42.4%
2	RAVIOLI	\$111,341,071	\$6,391,417	↑ 6.1%	37.8%	24,057,830	1,522,136	↑ 6.8%	38.0%
3	FETTUCCINE	\$9,940,950	\$452,720	↑ 4.8%	3.4%	3,656,991	42,772	↑ 1.2%	5.8%
4	LINGUINE	\$8,360,979	\$993,092	↑ 13.5%	2.8%	3,164,068	373,374	↑ 13.4%	5.0%
5	AGNOLOTTI	\$5,319,609	-\$160,910	↓ -2.9%	1.8%	1,424,577	22,980	↑ 1.6%	2.3%
6	ANGEL HAIR	\$3,160,102	-\$280,944	↓ -8.2%	1.1%	1,221,186	-159,038	↓ -11.5%	1.9%
7	GNOCCHI	\$2,896,654	\$572,820	↑ 24.6%	1.0%	664,208	137,741	↑ 26.2%	1.0%
8	TAGLIATELLE	\$1,394,194	-\$114,289	↓ -7.6%	0.5%	481,342	-85,856	↓ -15.1%	0.8%
9	LASAGNA	\$1,045,746	-\$65,262	↓ -5.9%	0.4%	268,313	-19,689	↓ -6.8%	0.4%
10	PAPPARDELLE	\$1,004,319	\$661,005	↑ 192.5%	0.3%	295,540	208,909	↑ 241.1%	0.5%
11	SPAGHETTI	\$930,111	-\$435,989	↓ -31.9%	0.3%	344,677	-76,745	↓ -18.2%	0.5%
12	BORSETTI	\$573,810	-\$5,761	↓ -1.0%	0.2%	157,104	809	↑ 0.5%	0.2%
13	CAPPELLACCI	\$500,453	\$94,934	↑ 23.4%	0.2%	124,510	16,629	↑ 15.4%	0.2%
14	MEZZALUNA	\$436,021	\$106,532	↑ 32.3%	0.1%	100,843	3,959	↑ 4.1%	0.2%
15	FUSILLI	\$308,922	\$44,256	↑ 16.7%	0.1%	58,940	7,689	↑ 15.0%	0.1%
16	MANICOTTI	\$299,956	-\$4,472	↓ -1.5%	0.1%	41,565	-988	↓ -2.3%	0.1%
17	SACCOTTINI	\$254,589	\$19,376	↑ 8.2%	0.1%	50,242	7,700	↑ 18.1%	0.1%
18	RIGATONI	\$183,262	-\$314,059	↓ -63.2%	0.1%	32,097	-85,567	↓ -72.7%	0.1%
19	SHELL	\$180,642	\$13,483	↑ 8.1%	0.1%	23,459	1,426	↑ 6.5%	0.0%
20	BUCATINI	\$141,118	\$9,126	↑ 6.9%	0.0%	25,053	1,913	↑ 8.3%	0.0%
-	ALL OTHERS	\$711,348	-\$171,736	↓ -19.4%	0.2%	238,499	52,028	↑ 27.9%	0.4%

Dollar % Share



Dollar % Change



Tortellini



Linguine



Pappardelle



Tagliatelle



Agnolotti



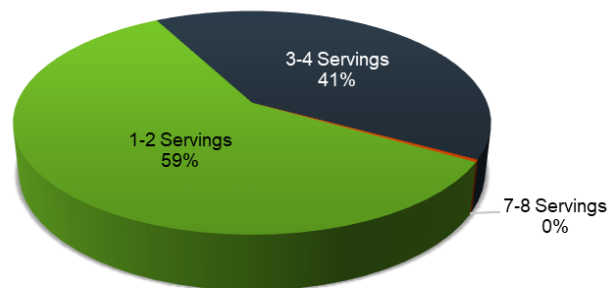
Fusilli



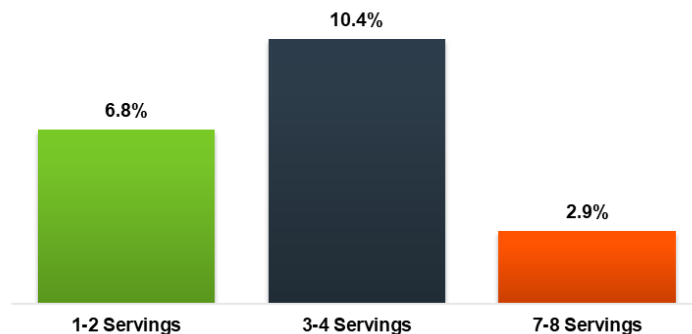
Gnocchi

Pre Cooked Pasta - Serving Size Insights - Total US Grocery

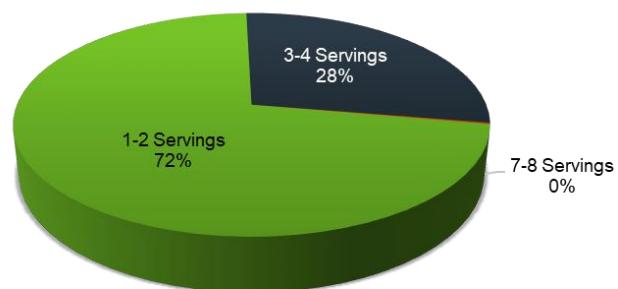
Dollar % Share



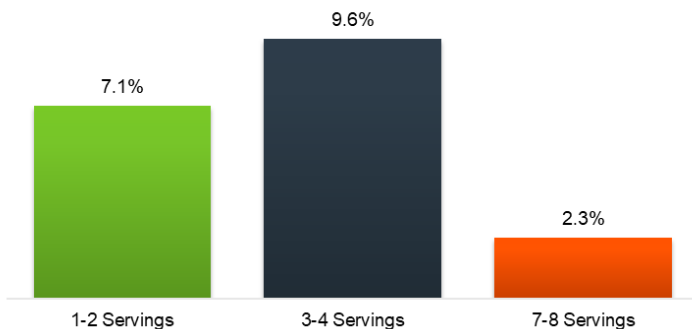
Dollar % Change



Unit % Share



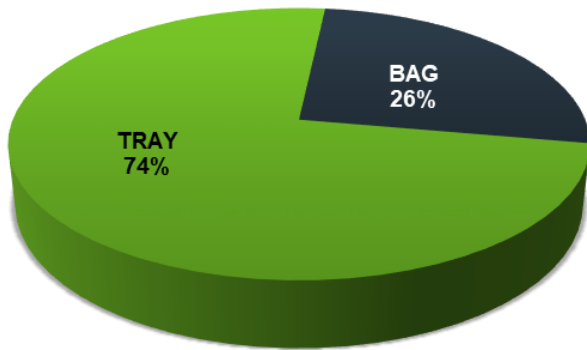
Units % Change



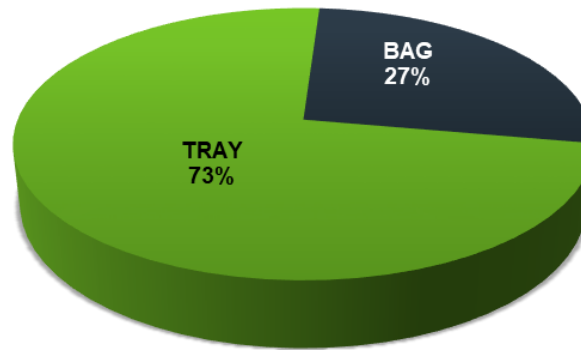
- Recommended package size: 1-2 servings, 8-12oz
 - It is the most popular size group across the regions & has majority category share, 59% dollar share and 72% unit share
- The 3-4 serving sizes are growing, but not substantially more than 1-2 servings, just about 1% category share gain from year ago
- According to Mintel:
 - There is a growing number of singles due to the stagnating marriage rate, 48% of adults age 15+ identified as single
 - Singles are less likely to cook from scratch than people who are married/have partners (36% vs. 59%)

Pre Cooked Pasta - Package Type Insights - Total US Grocery

Dollar % Share TY



Units % Share TY



- Recommended packaging: clear trays with minimal labels, exposing the product for consumers to see exactly what they're buying
- The majority of items (74% of dollars and 73% of units sold) are from Trays
- Trays offer a cleaner looking package, are less flexible, therefore protecting the product better than bags
- According to Mintel, 68% of US consumers agree it's important to be able to see the food inside the packaging
- Bagged packaging only accounts for 26.1% of sales, but it's up 46.8% from year ago. Giovanna Rana accounts for 96% of the Bag sales



#1 item in category



#8 item in category



#51 item in category



#63 item in category

Pre Cooked Pasta Regional Overview – 52 Weeks

- Recommended region for launch: Northwest, the most developed region for the category
- The Northwest, Southwest, and Northeast regions are all over developed, having CDI's over 100
- The Midwest, Southeast, and East Central regions are all under developed, having CDI's under 100

Category Development Index

