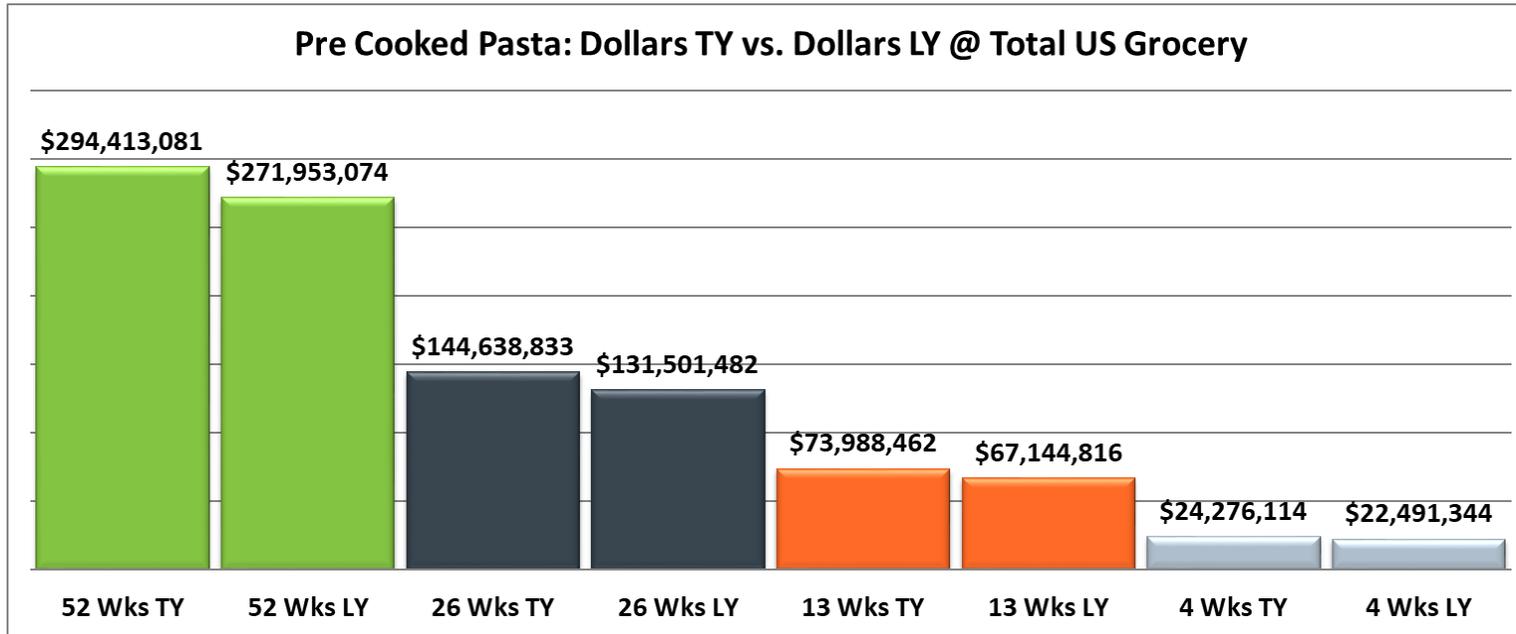
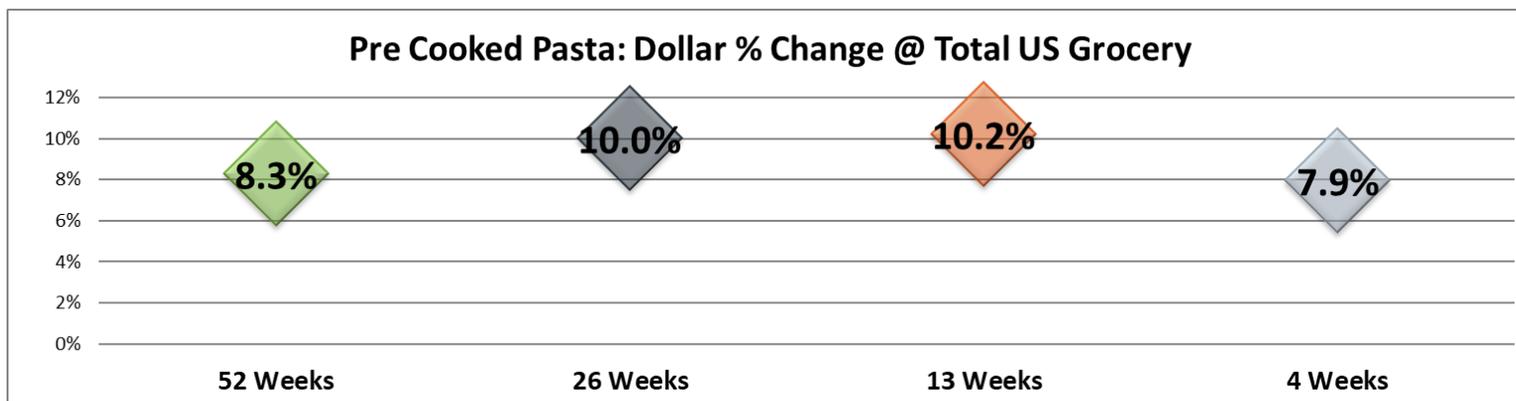


Pre Cooked Pasta Dollar Summary - Total US Grocery



- 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 | BUITONI | \$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)

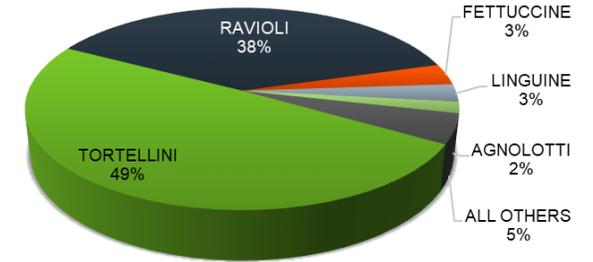
Pre Cooked Pasta - Pasta Type Insights - Total US Grocery

Recommended Types:

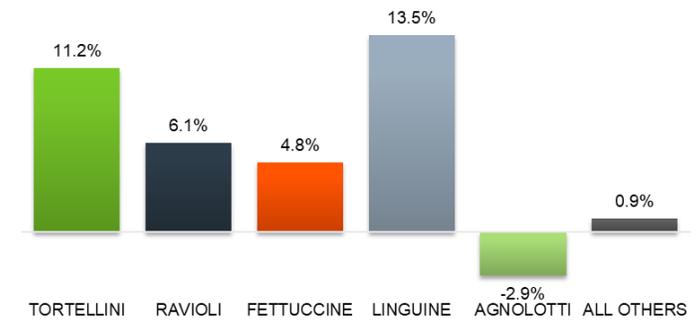
- Tortellini
- Fettuccine
- Linguine
- Gnocchi

| 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



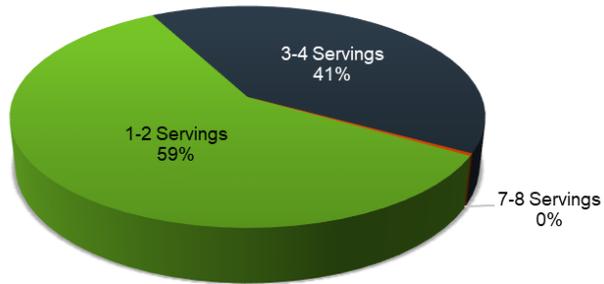
Fusilli



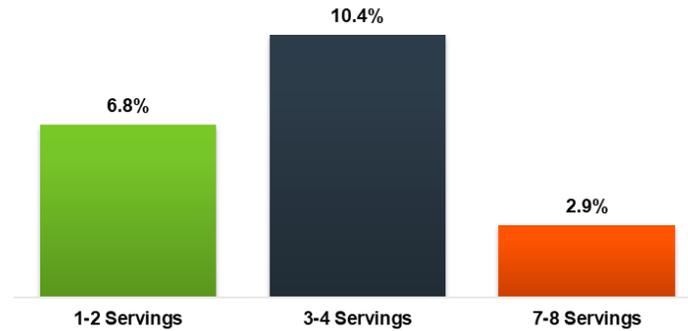
Gnocchi

Pre Cooked Pasta - Serving Size Insights - Total US Grocery

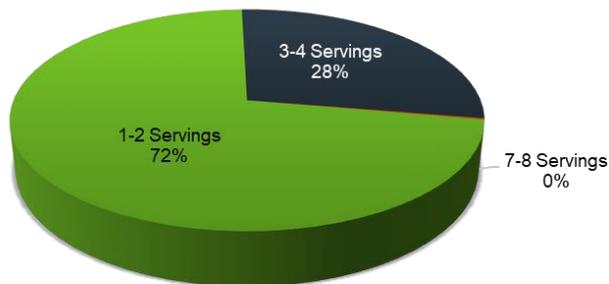
Dollar % Share



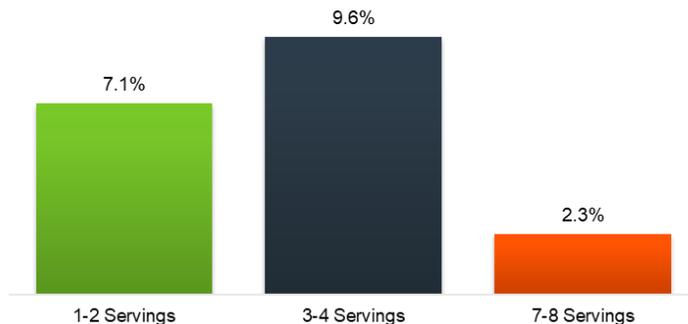
Dollar % Change



Unit % Share



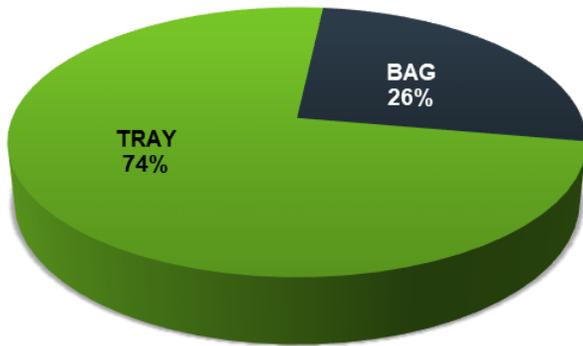
Units % Change



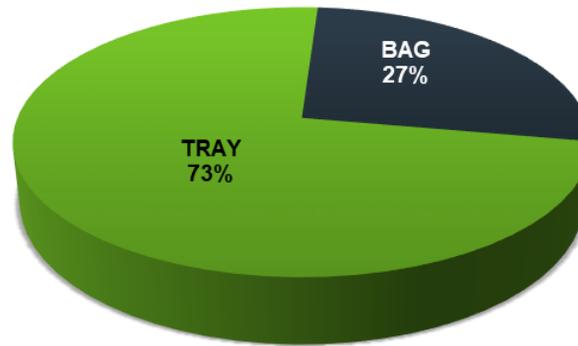
- Recommended package size: 1-2 servings, 8-12oz
 - It is the most popular size group across the regions & has majority category share, 59% dollar share and 72% unit share
- The 3-4 serving sizes are growing, but not substantially more than 1-2 servings, just about 1% category share gain from year ago
- 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

