



Tomato News Conference

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2018 EUROPEAN SS TOMATOES MARKET OVERVIEW

Volume Sales



1,273mio tons
-1,3%

Value Sales



2,045b €
-0,4%

Legend:

Green

Sales - Category Increase

Red

Sales - Category Decrease

EURO – 28 Countries



2019 EUROPEAN SS TOMATOES MARKET OVERVIEW

Volume Sales



1,291mio tons
+1,4%

Value Sales



2,113b €
+3,3%

Legend:

Green

Sales - Category Increase

Red

Sales - Category Decrease

EURO – 28 Countries



WHAT HAPPENED DURING 2020 PANDEMIC?

Food consumption moved:

From out of home to in-home consumption (lockdown)

From big HM to proximity stores/e-commerce (social distancing)

From service to kitchen (more time spent at home)

From chilled/short shelf to ambient/long shelf life (reduction number of shopping trips)

From convenient to basic categories (economic crises and worries)

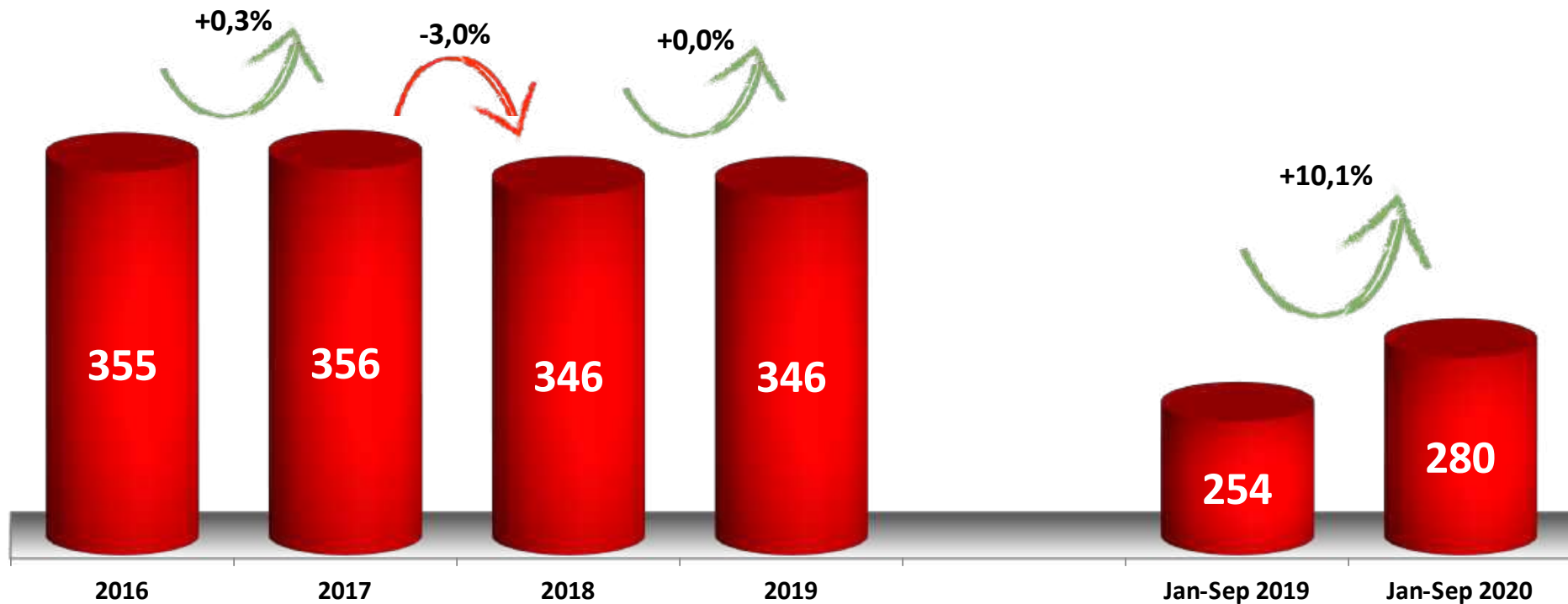


High growth of retail tomato consumption; significant loss in foodservice tomato consumption (lower than other food categories)



SS TOMATOES - ITALY

During Covid, retail tomato market is experiencing high growth



*Volumes in 000/Tons

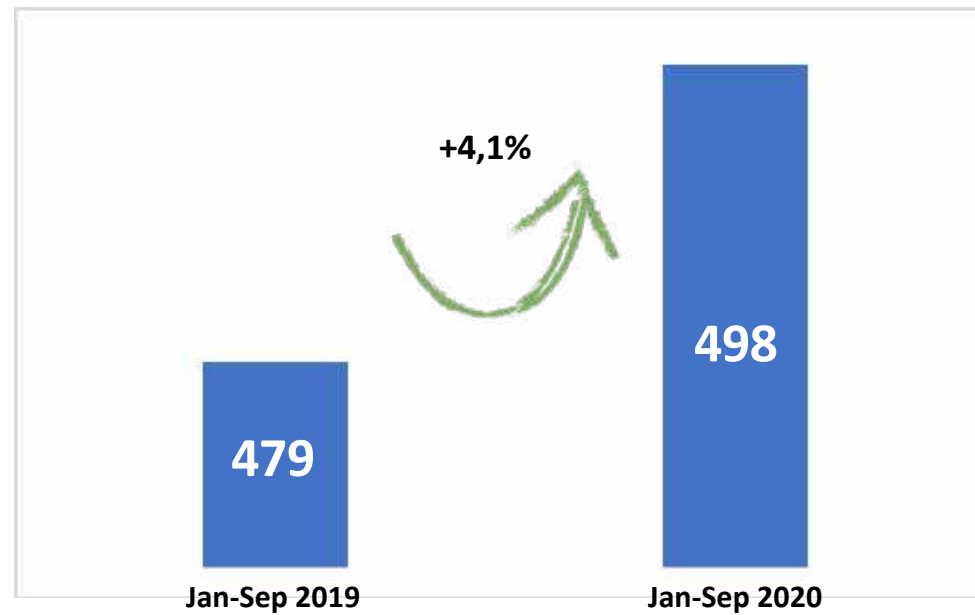
Source: IRI – H+S+SS @ YTD Sep 20

Mutti. Only tomato, much more than tomato.



PASTA - ITALY

Same happens in other basic and tomato-related categories, like Pasta



*Volumes in 000/Tons

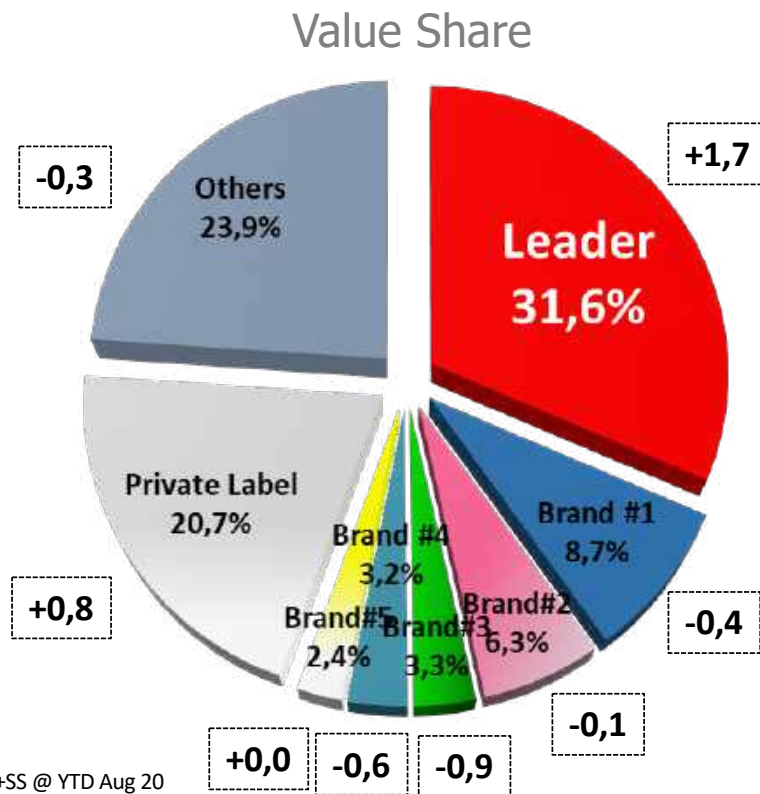
Source: IRI – H+S+SS @ YTD Sep 20

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SS TOMATOES - ITALY

Retail tomato market gets more polarized between leader (premium) and PL (price)



	Value (mio/€)	Δ % vs PY
TOTAL SS TOMATOES	369,1	18,6%
Leader	116,5	24,7%
Brand #1	32,1	9,8%
Brand #2	23,2	8,7%
Brand #3	12,0	-5,3%
Brand #4	11,7	0,0%
Brand #5	8,9	22,0%
Private Label	76,5	24,9%

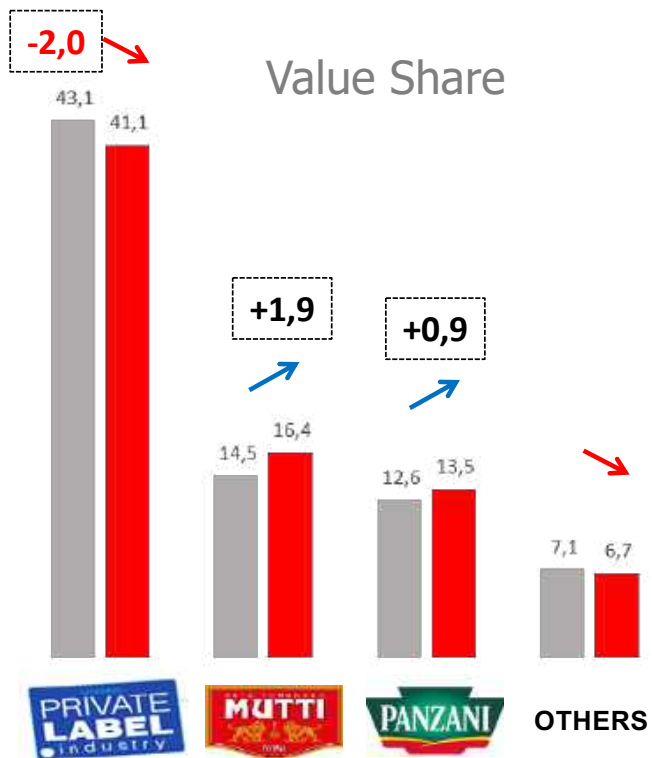
Source: IRI – H+S+SS @ YTD Aug 20

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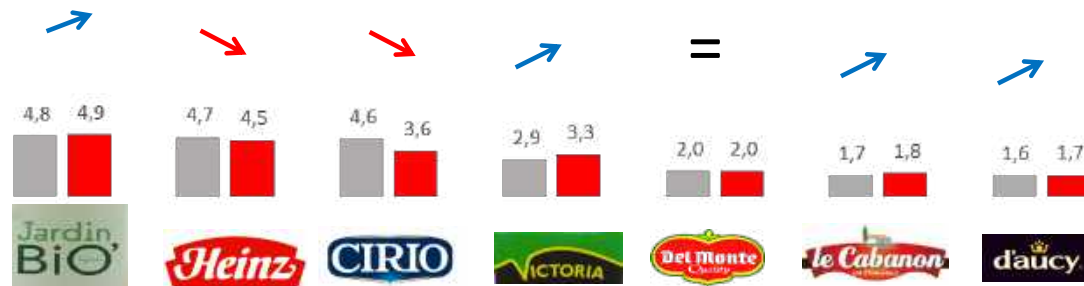
SS TOMATOES - FRANCE

French market keeps growing faster than Italy, with branded players winning



	2019	2020	DIFFERENCE
Sales Vol (T)	94 077,6	105 839,5	+12,5%
Sales Val (K€)	€179 022	€206 839	+15,5%

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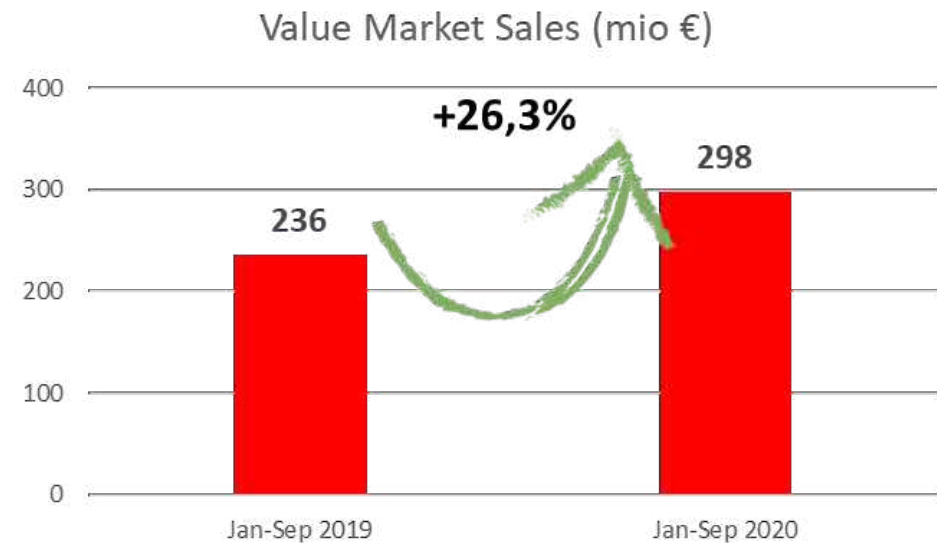
Source: IRI – H+S+SS @ YE Sep 20

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SS TOMATOES - GERMANY

German market shows the best performance in value, confirming 2nd biggest market



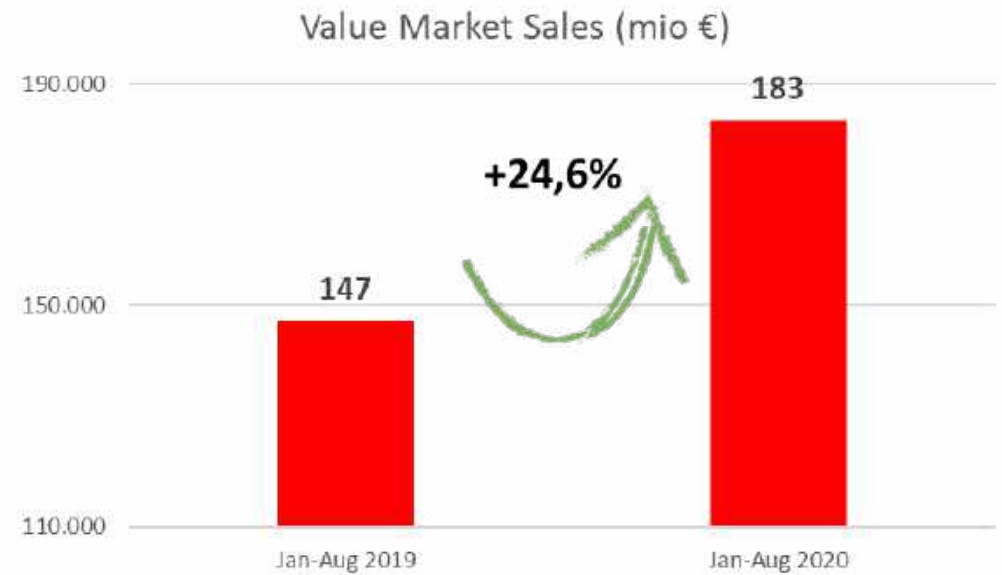
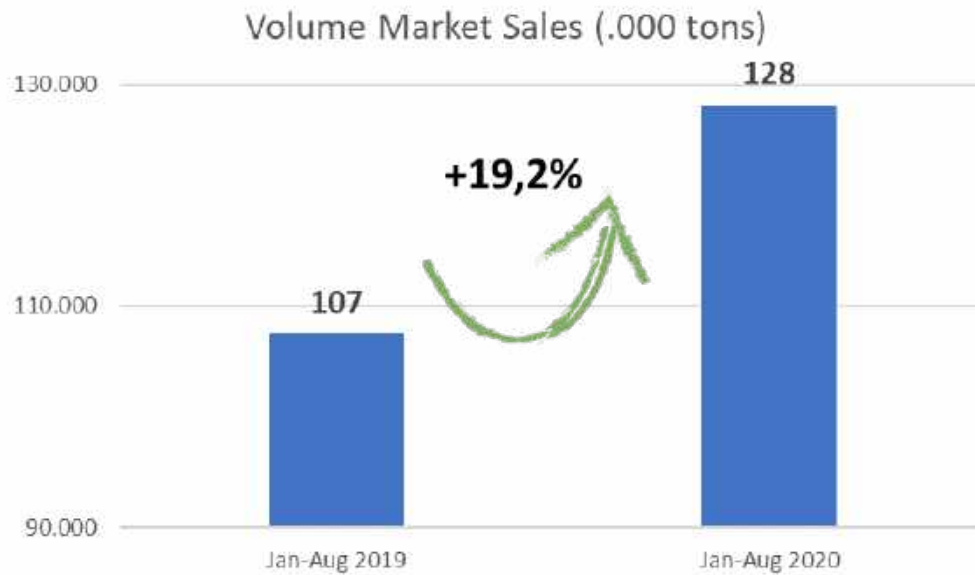
Source: Nielsen – Total market incl. Discounts @ YTD Sep 20

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SS TOMATOES – UK

UK market, third biggest in Europe, also grows at the same velocity in volume



Source: Nielsen – H+S+SS @ YTD Aug 2020

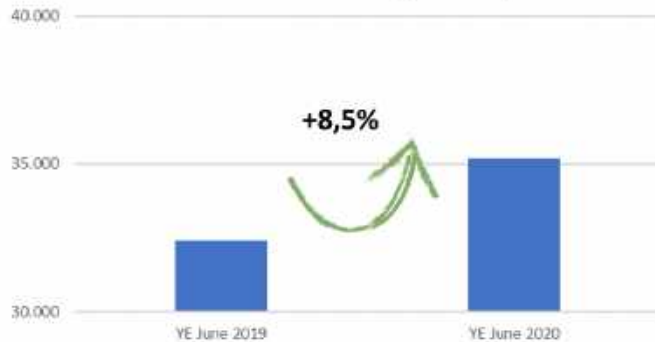
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SS TOMATOES – NORDICS

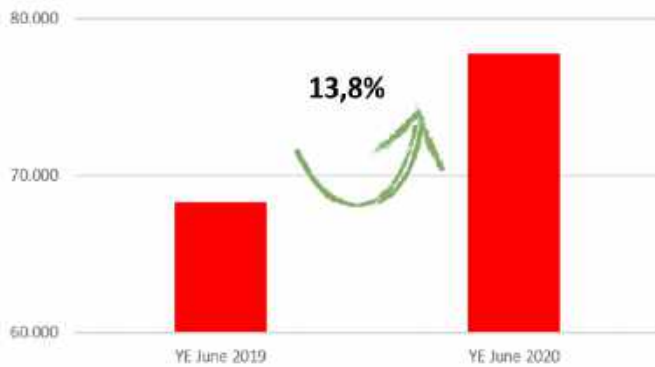
Sweden and Norwegian markets are also growing but at lower speed

Volume Market Sales (.000 tons)

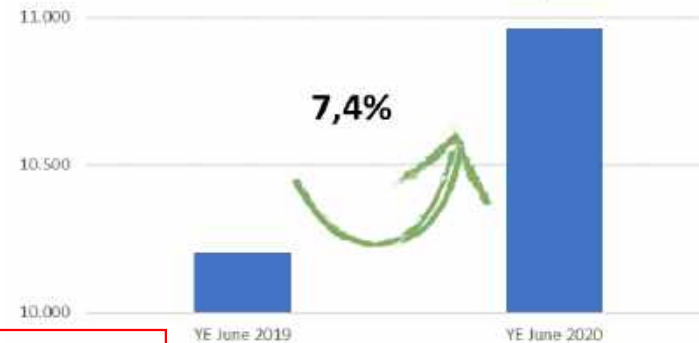


Sweden

Value Market Sales (mio €)

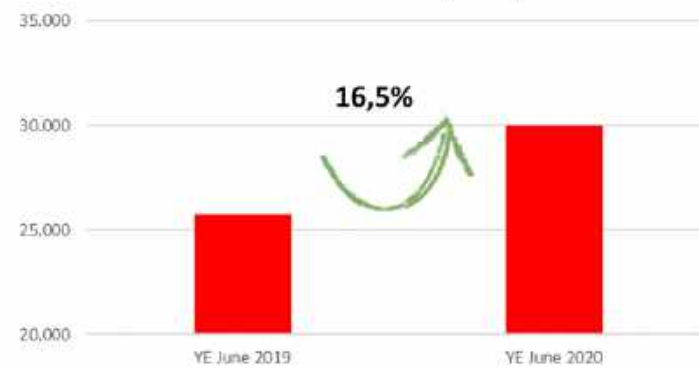


Volume Market Sales (.000 tons)



Norway

Value Market Sales (mio €)





WHAT WILL HAPPEN AFTER PANDEMIC?

- Some of the “new normal” trends will remain:

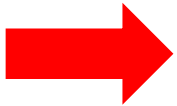
E-commerce

In home consumption

- Some of the “new normal” trends will gradually come back to pre-covid:

Convenient categories

Chilled/short shelf life categories



What will be the future of tomato consumption?