



UK Ambient Tomatoes Category Update

January 2025

Brand & Category Performance Headlines

CATEGORY

- **Continuing but slowing** category value momentum – lapping inflation & impacted by falling yoy volumes
- **Puree leads 12W value creation** (offsetting general slowdown & volume decline in Peeled)
- **Mutti & Napolina lead growth** – offsetting significant PL decline
- **>75% of L12W Puree gains are Tesco driven** (where PL has been off-sale since October)
- **All main category brands** have enjoyed strong Puree growth in Tesco
- **Puree has accounted for >80% of L12W growth actuals for Napolina, Heinz & Other brands**
- **Puree masks soft 12W core tomato performance / decline** for Heinz & Other brands

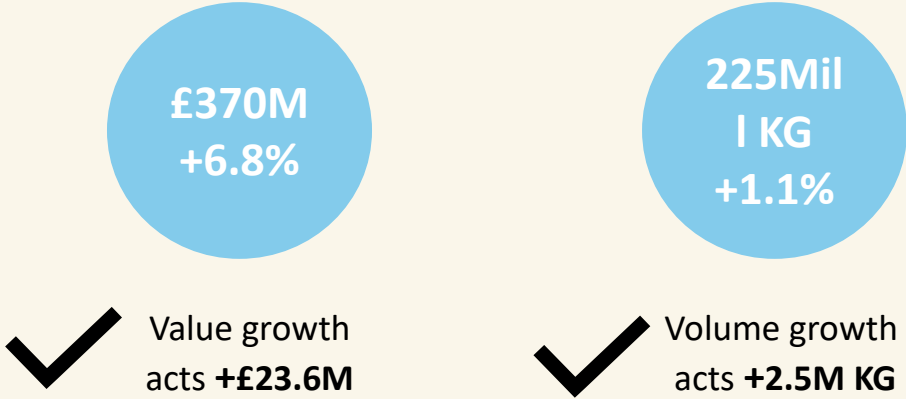
MUTTI

- Mutti enjoys **strong market momentum AND sustained growth** across all time periods
 - YOY Volume: +45% / +38% (MAT / 12we) YOY Value: +53% / +57% (MAT / 12we)
- In latest year, Mutti has added >£11M category value
- All main brand sectors are outperforming the market
- Mutti – along with Napolina – lead latest year category value creation
 - Mutti's growth is uniquely balanced across the FULL portfolio
- Mutti £ sales share reaches 8.6% (52we) and 10.1% (L12w) up 2.3% and 3.6% yoy
- Mutti's 12W £share tipped above 10% wc 14.12.24

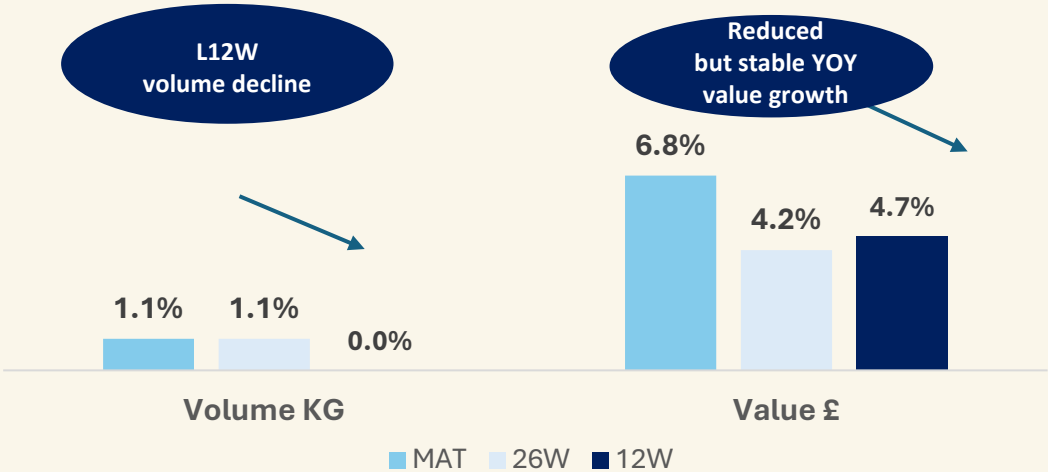
UK Tomato Category Performance



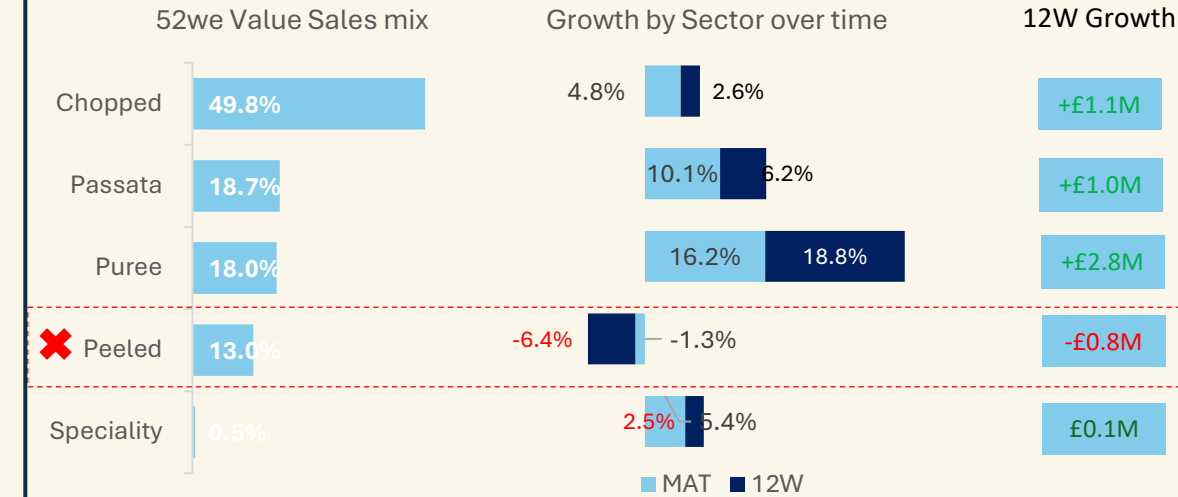
Continued 52W category momentum



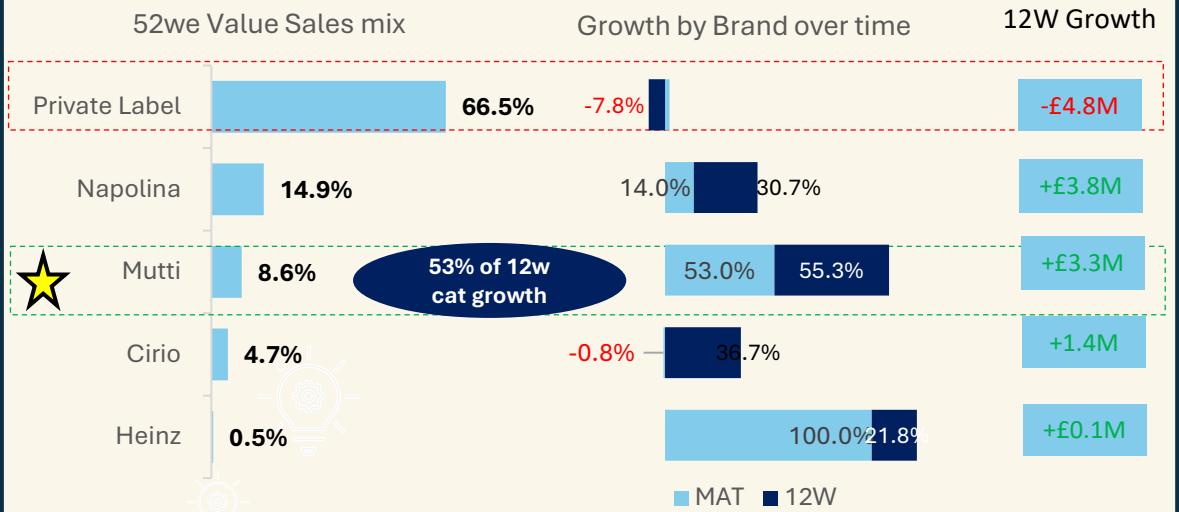
Slowing volume and value progression



General 12W slowdown vs MAT except in Puree & Speciality



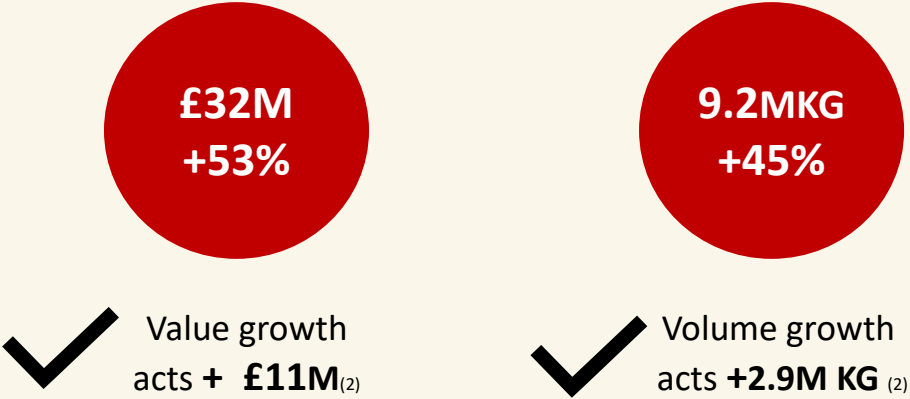
Significant 12W PL decline, offset by branded growth



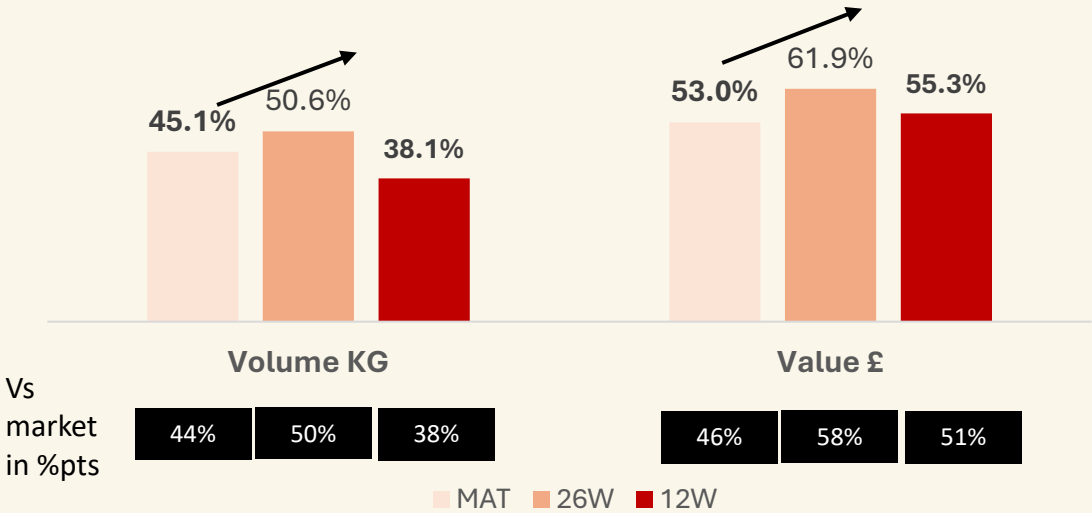
Mutti Ambient Tomato Category Performance



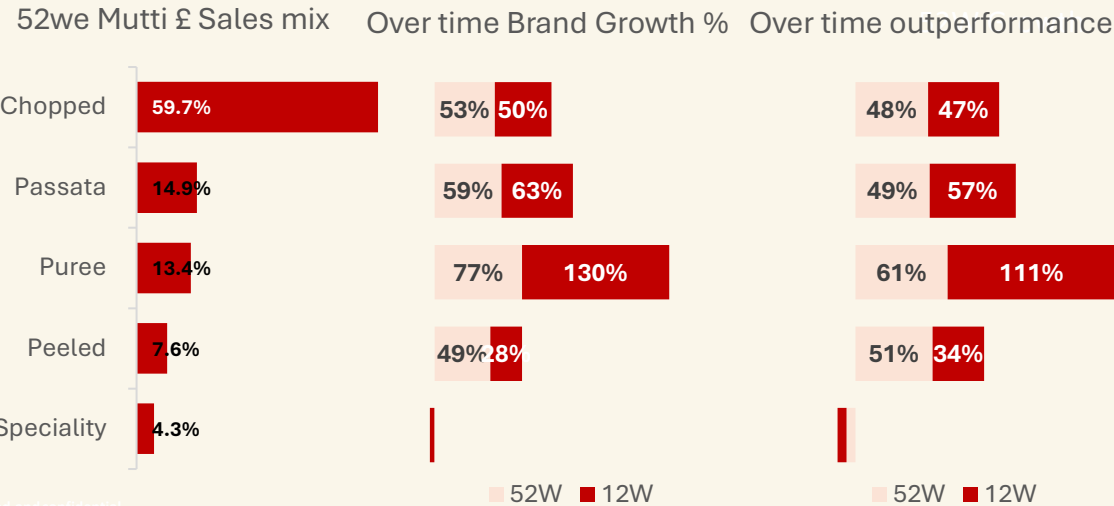
Strong 52W sales momentum



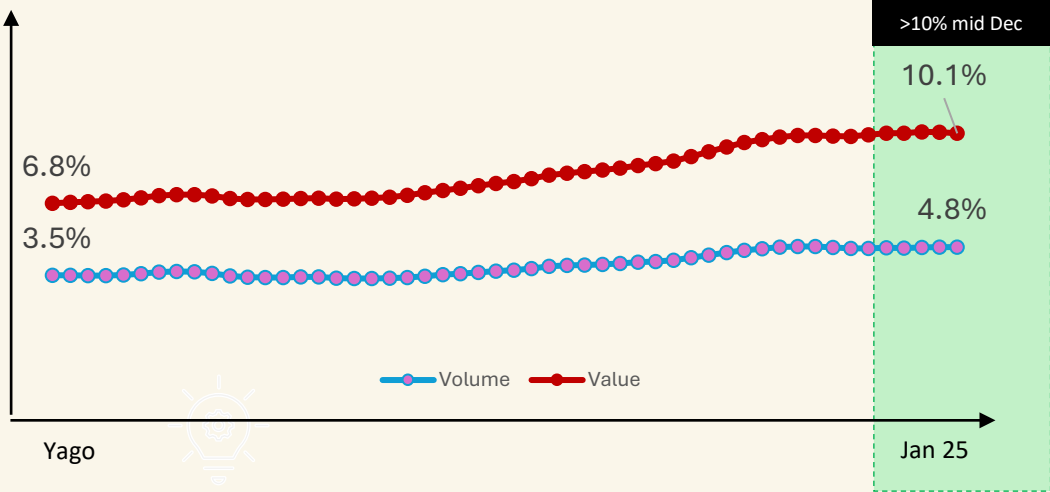
Sustained growth and market outperformance



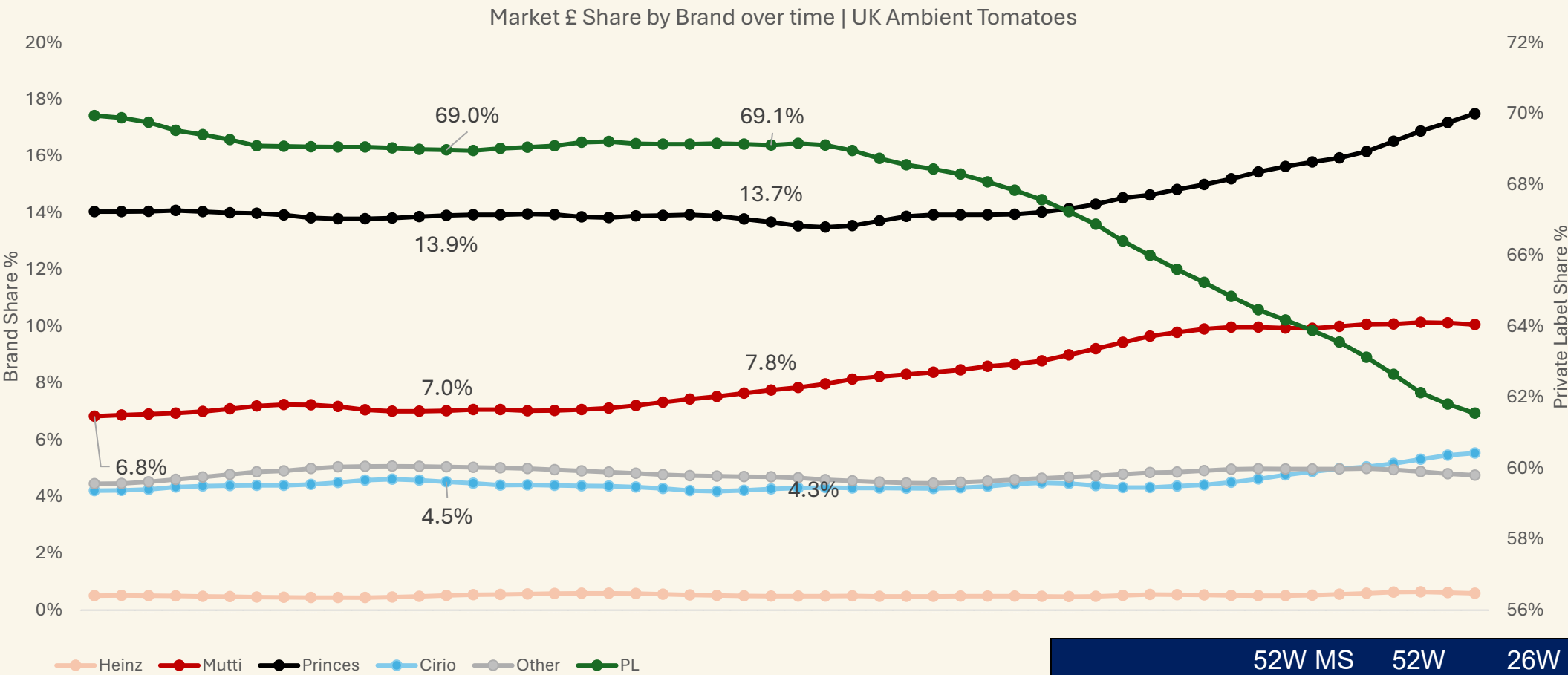
All main sectors outperforming & leading market growth



Continued share gains



Mutti #2 brand | Contributing >£11M yoy category sales uplift as well as leading value creation



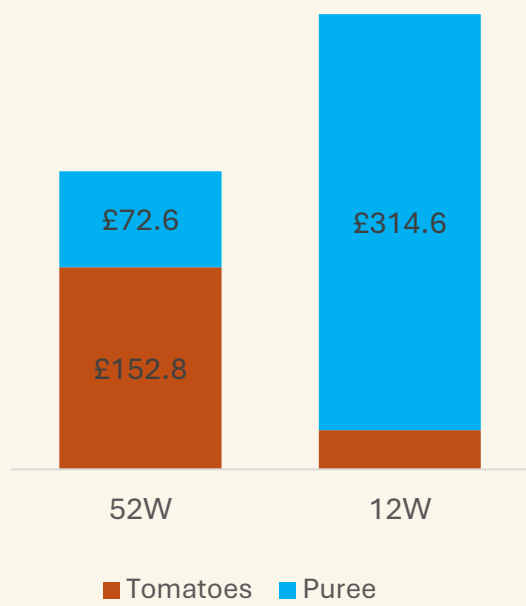
With a 52W share base of 8.6%, Mutti contributes >£11M yoy growth – almost equal to Private Label (8x scale)
 Mutti consolidates position as UK #2 brand with continued value growth momentum over time

	52W MS	52W	26W	12W
Private Label	66.5%	£5.3	£6.4	£4.8
Napolina	14.9%	£6.8	£5.2	£3.8
Mutti	8.6%	£11.0	£7.1	£3.3
Cirio	4.7%	£0.1	£0.9	£1.4
Heinz	0.5%	£1.3	£0.5	£0.1
Other	4.7%	£0.7	£0.5	£0.4



Puree drives >90% 12W growth

Weekly Market Growth £000 by Sector over time

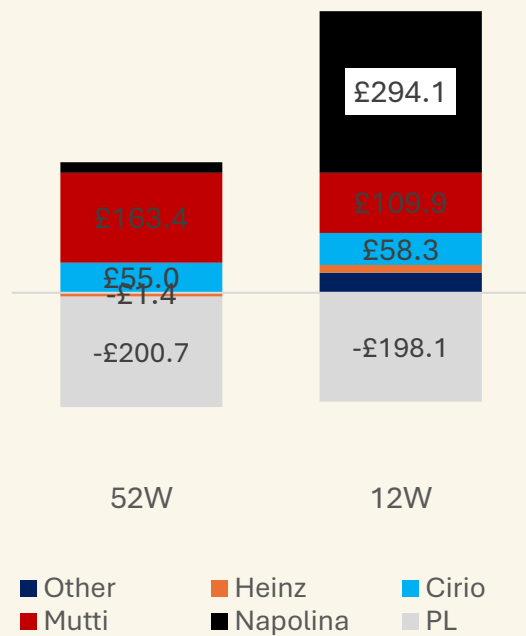


Core Tomatoes and Puree drive MAT growth on a 60/40 basis

In L12W core tomato growth has stagnated offset by Puree growth

Brands have offset PL

Weekly Market Growth £000 by Brand over time



Mutti and Napolina have overtaken PL as the main engine of in-year category growth

Brands are offsetting PL decline

Puree is masking a soft tomatoes performance for all bar Mutti

Weekly Market Growth £000 by Brand over time



- 1. L12W PL downturn is driven by both core Tomatoes & puree
- 2. Puree accounts for the bulk of 12W Napolina, Heinz & Other growth
- 3. Cirio growth is being driver 5050
- 4. Mutti continues to enjoy balanced portfolio growth