



# Shoppers fall back in love with tomatoes



**T**he ambient tomatoes category is worth £211m in sales and is growing in momentum, up 3.1% in 2021 vs 2019 (vol/kg)<sup>1</sup>.

Following years of commoditisation through everyday low pricing, a lack of game-changing innovation and investment, and no real shopper excitement or engagement to speak of, consumers developed a mainly functional connection to the category, so it was in desperate need of reinvigoration to re-engage consumers and bring it back to life and growth.

Fortunately, since 2021 the category has experienced a huge resurgence, brought about by a shift in consumer behaviours amid the pandemic and coinciding with Mutti's launch into the UK. The tomato specialise and No.1 brand across multiple markets in Europe<sup>2</sup>, is spearheading an exciting reinvigoration of the category, helping consumers to fall back in love with tomatoes again.

By studying UK consumer habits, Mutti has turned key insights into meaningful action, using its 120 years of expertise and its values of quality, sustainability and respect.

## A category growing in momentum

With volume sales continuing to stay ahead of pre-pandemic levels (+3.1%), Mutti is building even more momentum, adding £4.5m to the category and gaining +5% value share in the latest 12 weeks<sup>3</sup>. 46% of Mutti's gains were incremental to the category<sup>4</sup>, and it is committed to investing to ensure the recent consumer reconnection is a springboard for long-term value growth and premiumisation.

## Restaurant experience at home

Pre-pandemic, tomatoes saw relatively flat sales. But during lockdown, with less eating out, Brits rekindled their love of cooking. Inspired by social media and on-trend chefs, they sought out premium ingredients, such as Mutti's, to replicate restaurant quality at home, thus becoming more engaged with tomatoes and carefully choosing the right ones for their dishes.

## Mutti was the only brand to achieve value growth in each segment of tomatoes<sup>5</sup>

<sup>1</sup> Nielsen, Total Coverage, MAT 52 weeks to 31.12.21; <sup>2</sup> Nielsen, MAT, end Dec 21 vs end Dec 20; <sup>3</sup> Nielsen, Grocery Multis, 12 w/e 18.12.21; <sup>4</sup> Kantar, source of change and switching spend (E000), Total Tomatoes, 52 w/e 26.12.21 vs LY; <sup>5</sup> Total market, 52 weeks

## Bringing the restaurant experience home

**+20%**

of Brits are now cooking all three meals at home vs 12.5% before lockdown\*

**+50%**

have been experimenting and using extra ingredients in their cooking\*

**60%**

will rely less on eating out due to the risk of Covid exposure and lower spending power\*

\*Research commissioned by Tesco during lockdown; \*Bain & Company 2020

## More than 4/5ths of the UK population buy canned tomatoes on average once per month

### TOTAL AMBIENT TOMATOES CONSUMER KPIS/52 WEEKS



**83%**

PENETRATION  
(-3% PTS)



**12 times**

FREQUENCY OF  
PURCHASE P.A.



**0.9**

UNITS PER TRIP  
(-2.8%)



**£1.08**

AVERAGE  
UNIT PRICE

Source: Kantar Worldpanel, 52 w/e 31.10.21

## Size and growth of ambient tomatoes in 2021

	VALUE (SALES)	YOY GROWTH 31.12.21	MUTTI GROWTH 31.12.21
<b>Total category</b>	<b>211,883,593</b>	-13.0	122.2
<b>Chopped</b>	<b>118,023,904</b>	-11.2	87.2
<b>Purée/Paste</b>	<b>63,966,320</b>	-14.3	176.0
<b>Whole</b>	<b>28,270,353</b>	-17.8	195.1
<b>Speciality</b>	<b>860,313</b>	39.7	249.4
<b>Other</b>	<b>762,702</b>	-20.4	N/A

Nielsen MAT 2021 Total Coverage

# MASTERCLASS

## AMBIENT TOMATOES CATEGORY



Mutti Polpa's unique, rich texture

### Mutti Polpa – a unique offer

Mutti's commitment to processing its 100% Italian tomatoes within 24 hours of harvesting, gives Mutti Polpa an incomparably fresh taste. It also has a unique consistency, as Mutti chops its tomatoes especially fine creating a perfect balance between the tomato juice and fine pieces of pulp, ensuring a rich and consistent texture with an abundance of tomato pieces in every bite. This allows the Polpa to maintain the freshness of freshly picked tomatoes over long cooking times, even at high temperatures.



### Attracting young consumers

Mutti attracts a distinctive consumer profile compared to other brands. Its users have a high annual income and are typically younger – Mutti has the strongest appeal and indexes a 128 average on 25- to 44-year-olds in one of the UK's top three supermarkets vs other brands in the category at 94-102<sup>6</sup>.

This is a great opportunity for retailers, as by attracting more of these shoppers into stores and into the category, they can encourage trade-up and incremental market sales growth.

<sup>6</sup> Retailer loyalty card data 52 w/e Jan 2022

### Getting to know your tomatoes

## A category-leading approach

**W**ith 120 years spent specialising in tomato products, Mutti takes a category-leading approach to help drive long-term market growth in partnership with key customers. Its research has enabled it to learn who UK tomato consumers are, their drivers and motivations, and why they are willing to pay more for better products, both from a quality and operational perspective. These insights and Mutti's efforts and investment help retailers and consumers to better understand and choose the best-tasting tomato product.

#### Chopped tomatoes

- The biggest tomato sector
- Needs: healthy, good quality and fresh tasting
- Usages: everyday meals such as pasta, chilli con carne and curry



#### Taste boosters

- Includes concentrated tomato purée and paste
- Needs: adding taste and

colour to dishes

- Usages: pizza, meat stews, cottage pie and 'regular' dinners

#### Classic whole tomatoes

- The closest products to fresh tomatoes in terms of appearance and texture
- Needs: healthy products for everyday consumption and make users feel content with their preparation
- Usages: everyday meals and special occasions for dinner, but also breakfast and lunch.



#### Passata

**Consumers naturally split passata into two sub categories:**

##### 1. Mainstream Passata

- One of the most versatile tomato products loved by families and foodies
- Needs: genuine healthy and natural products fresh in taste and smell
- Usages: everyday meals and special occasions including pasta, pizza, lasagne, meatballs, meat stews and homemade soups

##### 2. Special Passata

- Includes premium-quality passata products – i.e. Mutti – which particularly appeal to young people living in families and with young children
- Needs: delivers a more intense and balanced flavour for a great end-result and allows for experimentation and making dishes more premium
- Usages: a wide variety of dishes and occasions – not only dinner but brunch on normal or special occasions



#### Whole specialties

- Includes specialties like cherry tomatoes for people who love cooking and always search for the best ingredients
- Needs: adding naturalness and a personal touch to dishes to give the cook real satisfaction with the results of their dishes
- Usages: breakfast, brunch, lunch and dinner





**Understanding emotional and functional benefits**

# Creating shopper emotions for tomatoes

**A**mbient tomatoes, a high-frequency category, is typically consumed in classic dishes that Brits love to cook. While dominated by functional needs – products that are quick and easy to prepare, add taste to dishes and are low-cost – Mutti’s research shows consumers are also seeking quality: ingredients treated with care, different from others, natural and produced by a socially responsible company. Mutti’s ambition for continuous improvement, means consumers don’t need to compromise between great taste and a sustainable, respectful and quality choice.

**Education and inspiration**  
Mutti’s enthusiasm for learning what UK consumers need and sharing its expertise and values means they are bringing the tomato as close as possible to them. They do this by explaining what makes the best-quality tomato – how to use it, the processes that go into farming it and its natural lifecycle.

Examples include Mutti’s investment in key consumer activations such as TV advertising. Mutti filmed a campaign in Parma, Italy during the harvest, with farmer and presenter Jimmy Doherty taking viewers on a journey of discovery, to learn about Mutti’s uncompromising quality, the harvest and production, and Mutti’s respectful and sustainable practices. Plus,



**CEO Francesco Mutti with the Pomodorino d’Oro award**

inspired by Mutti’s annual Pomodorino d’Oro award, presented to the farmer who supplies the best-quality produce, Mutti launched a new culinary competition, Golden Tomato Cook, recognising and rewarding the UK’s best tomato cook. Such activities help consumers recognise there is a different tomato standard, and select the healthiest, most tasty version available.

**Positive environmental impact**

Sustainability has always been part of Mutti’s values, underpinned by its respect for people and nature. This remains fundamental, with UK consumers increasingly concerned about sustainability and a recent report revealing that 81% believe it’s important the brands they buy have a positive environmental impact<sup>7</sup>.

By bringing its proposition to UK consumers, Mutti is helping them to better understand and choose the best-tasting tomato product, without compromising their values.

**What do consumers look for?**

<b>It is good value for money</b>	<b>48</b>
<b>It has the right consistency</b>	<b>36</b>
<b>It is a straightforward product</b>	<b>33</b>
<b>It blends well with the other ingredients</b>	<b>33</b>
<b>It is a product that I trust</b>	<b>32</b>
<b>It is a healthy product</b>	<b>27</b>
<b>It is high quality</b>	<b>26</b>
<b>It has a fresh taste</b>	<b>25</b>
<b>It isn’t watery</b>	<b>25</b>
<b>It is suitable for daily consumption</b>	<b>25</b>
<b>It is from a well-known brand</b>	<b>20</b>
<b>It has a sweet tomato flavour</b>	<b>19</b>
<b>It is from a quality brand</b>	<b>19</b>

Base: SKUs consumed by total respondents (n.1611)

Q: Think again about when you last used tomato-based products... which of the following statements best describes the ideal experience you were looking for on that occasion? Source: IPSOS, Mutti quantitative research, UK 2021

7 Sustainability trends report 2022 | Attest (askattest.com)



### The opportunity

## Growing tomatoes together

**T**o keep the ambient tomatoes category growing, it must continue to evolve. Mutti is adding value and driving growth through:

#### Quality products

Consumers are prepared to pay a higher price for Mutti because of its high quality, which offers retailers the opportunity to trade consumers up and generate higher margins.

#### Values consumers expect

Mutti's commitment to making a positive environmental and social impact align with the values consumers seek. This includes Mutti paying a higher price to its farmers – on average 10% higher than the market over the past 10 years – and awarding the Pomodorino d'Oro (Golden Tomato Award) to farmers who produce the best-quality tomatoes.

#### Driving purchase frequency

Mutti encourages consumers to better understand different tomatoes and different tomato products, broaden their repertoire and choices, which in turn increases their average weight of purchase and purchase frequency.

### Maximising sales



**Ensure shoppers can trade up** to premium-quality tomatoes such as Mutti. This could increase AWP by 50% (£1.20/£0.80). Mutti 'must-stock' core SKUs include:

- Mutti Polpa Finely Chopped Tomatoes 400g
- Mutti Peeled Tomatoes 400g
- Mutti Passata 400g
- Mutti Double Concentrate Puree 130g
- Mutti Pizza Sauce Aromatica 400g



#### Make tomatoes a destination

- Use POS to signpost the category to create inspiration and authenticity.



#### Enhance visibility

- Ensure premium brands such as Mutti tomatoes are positioned at eye level to encourage shoppers to trade up, are well-stocked on shelf and priced correctly.
- With new HFSS regulations effective from October 2022, consider using premium tomato brands like Mutti for a secondary feature to drive category growth.

#### EVERY GREAT RECIPE DESERVES A GREAT TOMATO

We offer the best fitting tomato product for any recipe. All made of 100% Italian perfectly ripe tomatoes.



#### Create excitement

- Shift the dial from tomatoes being a functional product to building an emotional connection with the category.
- Make tomatoes the hero of the dish by educating shoppers on the different tomato varieties, cooking times, textures, flavours and product selection.



#### Capitalise on seasonal events and focus periods

- Maximise the opportunity to align POS, promotions and feature in-store with Mutti's key investment and communications periods throughout the year.
- Bring excitement to the category with Italian-themed events such as National Pizza Day.

**For further information please visit [mutti.co.uk](http://mutti.co.uk) or email [mutti@rhamar.com](mailto:mutti@rhamar.com)**