

# SS PASTA & PIZZA SAUCE

CATEGORY & SUB-CATEGORY REVIEW

July 2025

**PIZZA - PASTA SAUCE**



**MAINE CENTER  
FOR ENTREPRENEURS**

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# Project Overview

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## Report Purpose

This report was created to assist businesses selling in the Pasta & Pizza Sauce category to better understand the markets for their products and target new markets in the United States. Data presented in this report is intended to provide greater detail on consumer purchasing trends for products in this category.

## Included in this report:

This report provides market dynamics for each product subcategory within the shelf-stable(SS) Pasta & Pizza Sauce category, delivering detailed insights into sales performance across diverse channels and US Census territories. Within this expanding category, the report covers two primary subcategories: SS Pasta Sauce and SS Pizza Sauce.

Despite most sales being attributed to the Multi-Outlet (MULO) channel, this report also includes a breakdown of sales in the Natural Channel to address the prominence of emerging Maine Food & Beverage producers active in Natural and Specialty markets. Additionally, the report highlights the performance of leading brands within the Northeast Census region, a typical entry point for Maine producers.

## Data

All data in this report is derived from the **SPINS Satori Database** and refers to the latest 52 weeks, ending June 15, 2025, unless otherwise noted.

## Project Team and Project Funding

This report was completed by the Maine Center for Entrepreneurs, in partnership with Camoin Associates. Work was completed as a part of the larger body of work under the Domestic Trade Pilot Program, commissioned by the Maine Office of Business Development and funded in part by the Maine Jobs & Recovery Plan.



# How to Use This Report

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## Size of Market

These details and subcategory performance information are valuable for a sales or pitch deck. Generally, businesses and investors find it helpful to understand the overall size of the category and subcategories to **measure the health of a particular category and the scope of opportunities within it.**

Details about market sizing can be found in Section III.

## Growth of Market

Each section of this report shows how the category or subcategory is growing in the Multi-Outlet Channel and Natural Channel, and which geographic areas are growing faster than others. This information helps companies think strategically about **which retail channels offer the best opportunities** for growth in the category and subcategories and **which regions represent the best prospects.**

## Top 10 Brands in the Northeast Region

Most Maine companies start their retail development locally and then build out regionally and nationally. Companies can leverage this information to **identify the top-performing brands, how they are performing in sales dollars and units sold, and how your brand is performing against them.**

## Average All Commodity Volume (ACV)

This represents a weighted measure of product availability or distribution based on total store sales. High values indicate the brand is performing well, while low values indicate an opportunity for brand distribution growth or a more optimized market share. **This can help a company understand which brands are performing well or lack distribution.**

## Average Retail Price in the Top 10 Brands

helps companies understand retail pricing trends. Note that most retail brands showed pricing growth due to inflation. This information **can be used in sales reports as a comparative analysis against performance in the subcategory.** This data reflects the point of sale and scanned price for the brand's products, including discounts at the register. It does not provide pricing for individual SKUs, which should be reviewed when making pricing and pack size decisions.

## Other Uses

This data can direct a company's business development efforts. Suppose a certain channel and location have experienced strong growth. In that case, identifying best-fit retailers in those locations and connecting with relevant distributors and brokers can be worthwhile. **Again, indicating the growth of a channel or geography can be a useful reference point to include in a sales or pitch deck.**

# Executive Summary

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## **SS Pasta & Pizza Sauce category is valued at \$4.36B in retail sales in the United States**

The overall product category grew 3.6%, annually in 2025, and grew in all US Census regions. The South led in sales volume, at \$1.70 billion, and demonstrated a solid growth rate at +4.9%.

**The review guideline for this project is to provide focus on the category and the two subcategories that comprise total category sales. i.e., SS Pasta Sauce and SS Pizza Sauce.**

Of the 2 subcategories reviewed, the Pasta Sauce subcategory, registering 95% of total subcategory \$ volume, at \$4.14B, is experiencing solid growth to the previous reporting period with \$ growth of +3.5%. Pizza Sauce, the 2<sup>nd</sup> largest of the subcategories, experienced a larger sales increase, accounting for \$223.3M in \$ volume, and \$ growth of +5.8% over prior year.

It is important to consider that the food inflationary trends of 2025 continue to be a contributing factor to the reported sales growth, potentially affecting the true scale of market expansion.



## SPINS Satori Data

52 Weeks Ending June 15, 2025

### Category: SS Pasta Sauce & Pizza Sauce

- Sub-Categories:
- Pasta Sauce
- Pizza Sauce

### Channels:

**MULO** “Multi Unit Location Outlet” - includes Food/Grocery, Drug, Mass Merchandisers, Walmart, Club Stores (BJs and Sam’s), Dollar Stores (Dollar General, Family Dollar, Fred’s Dollar), Military DECA (commissaries).

**Natural** - includes full-format stores with \$2 million+ in annual sales and 40% or more of UPC-coded sales from natural/organic/specialty products. Includes co-ops, associations, independents and large regional chains (excludes Whole Foods & Trader Joes).



### SPINS Syndicated Retail Data

The data included in this report is from **SPINS Satori Database** and includes Retail Scan Data for the Natural sales channel and Multi Unit Location Outlets (MULO). SPINS is focused mainly on the health and wellness ecosystem and addresses the growing niche landscapes of natural, specialty, alternative, and gourmet product retailers. SPINS partners with IRI to provide MULO data.

### US Census Regions





# SPINS<sup>®</sup>

## Additional Terms & Definitions

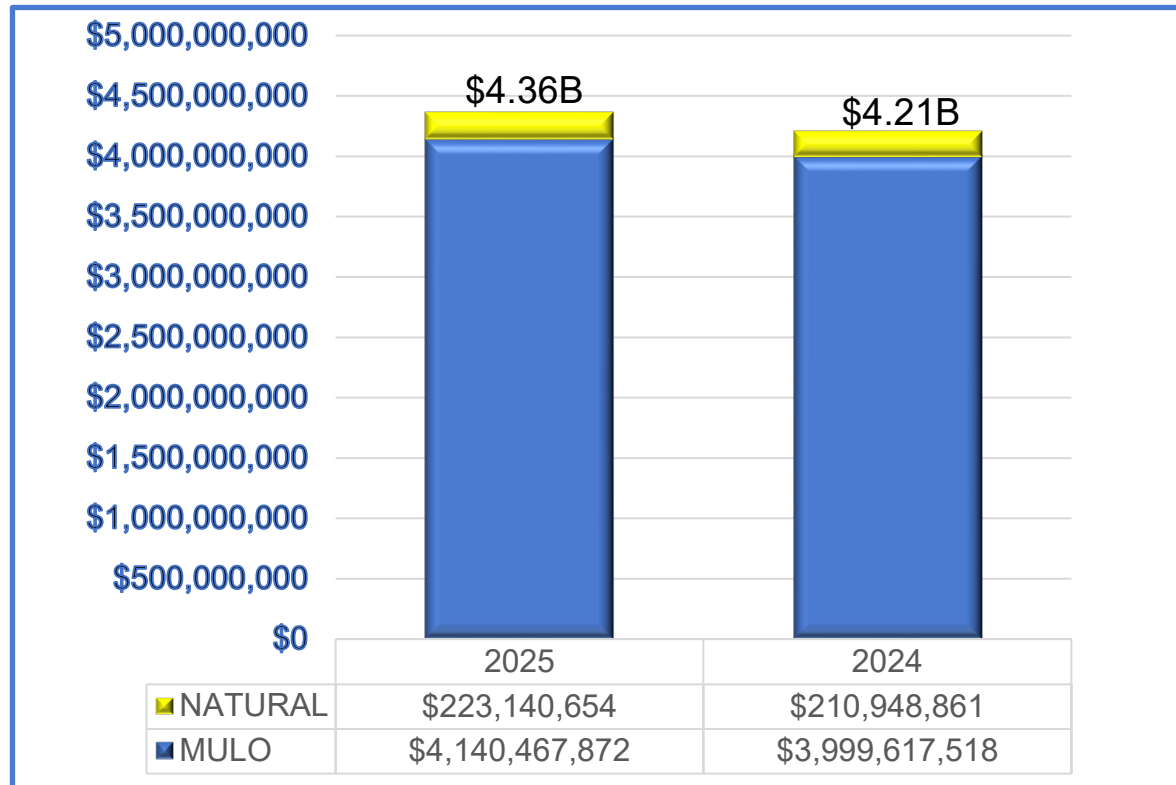
Term	Definition
Dollars	Total dollar sales of a product or group of products in the time frame indicated.
Dollars, Yago	Dollars sold over the same time period a year ago.
Dollars +/- Chg, Yago	The positive or negative dollar change for products sold in year reported, versus previous year.
Dollars % Chg, Yago	The positive or negative percent change of dollars sold in year reported, versus the previous year.
Units	Total unit sales of a product or group of products.
Units, Yago	Units sold over the same time period a year ago.
Units +/- Chg, Yago	The positive or negative units change for units sold in year reported, versus previous year.
Units % Chg, Yago	The positive or negative percent change of units sold in year reported, versus previous year.
AVG ACV	This Average All Commodity Volume measure is an average of a product's distribution weighted by the store size (ACV) across all weeks in a time period in which the product was distributed.
Average Items Selling	This is the number of items, on average, that a retailer carries of a category, segment or brand. e.g. if a brand is made of 7 different items (skus), the average store that carries the brand at all may have 4.
ARP	The Average Retail Price reports the average product unit price.
ARP, Yago	Average Retail Price over the same time period a year ago.
ARP +/- Chg, Yago	The positive or negative dollar change for average retail pricing in year reported, versus previous year.

# SS Pasta Sauce & Pizza Sauce Category Performance

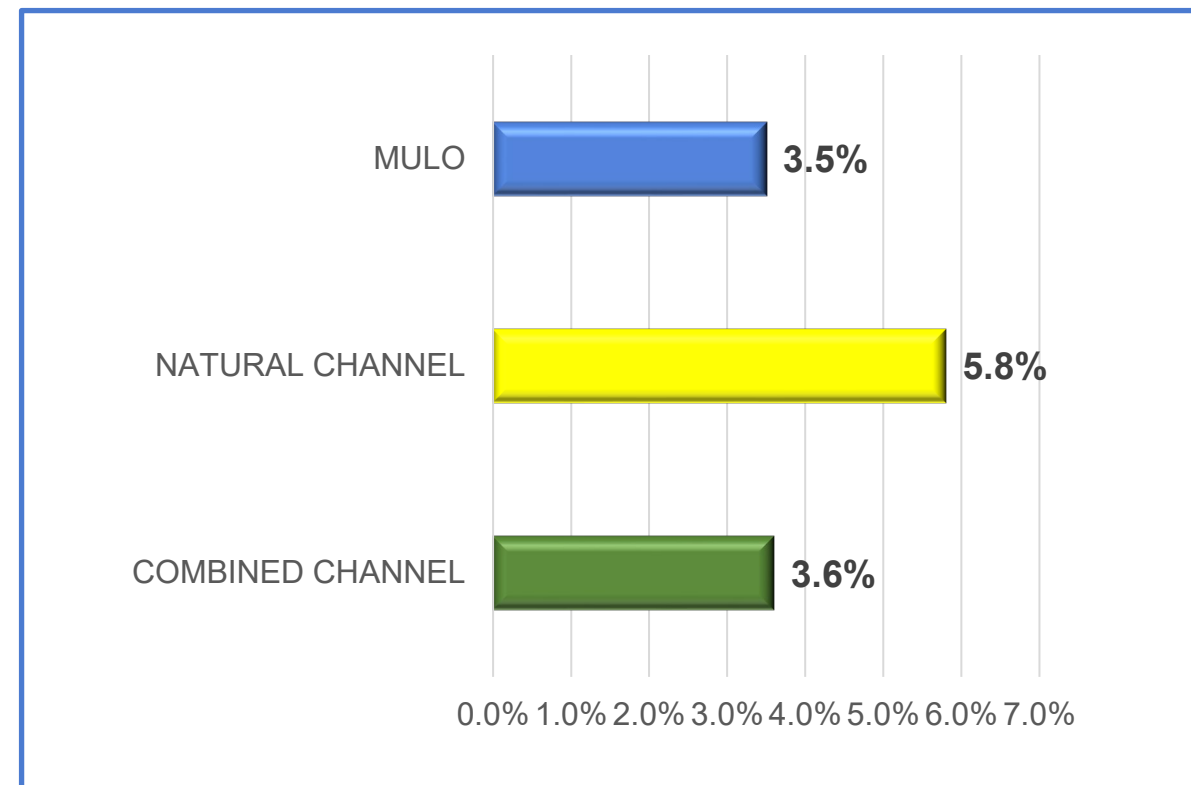
*SPINS Satori - 52 Weeks Ending June 15, 2025*

# Total Category – Pasta & Pizza Sauce

Total US Dollars



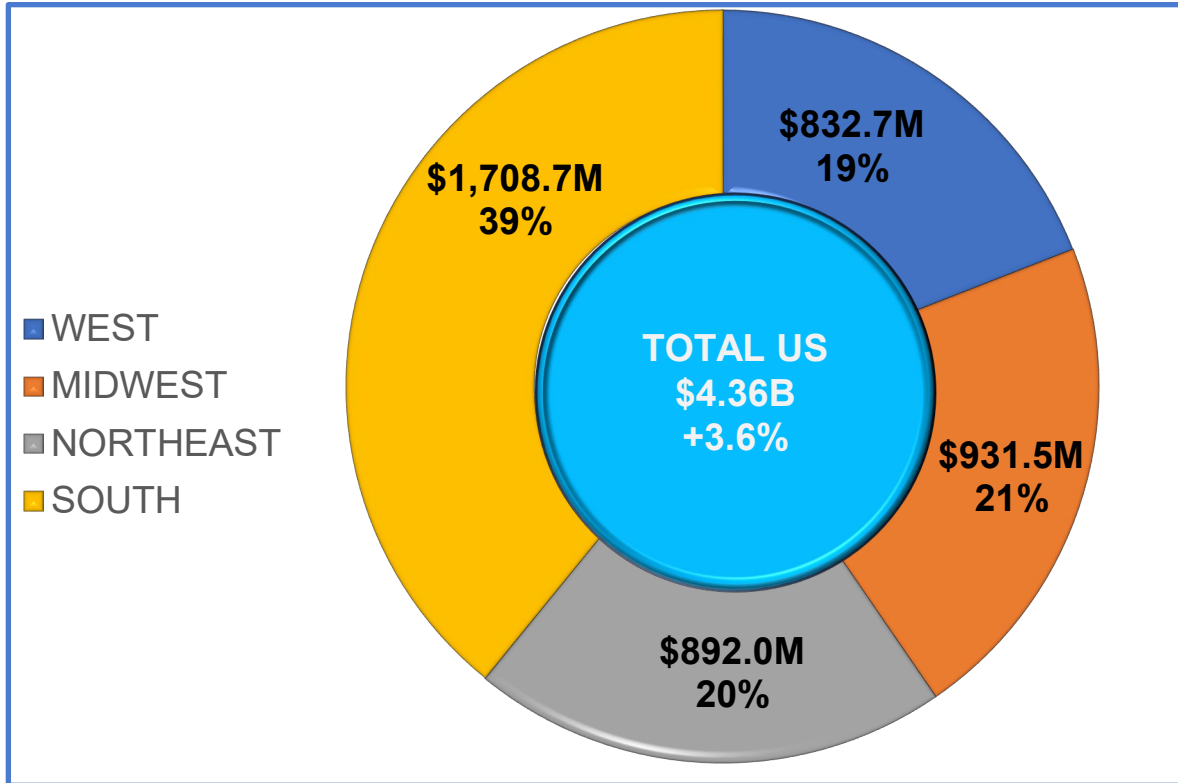
% Dollar Change vs Year Ago



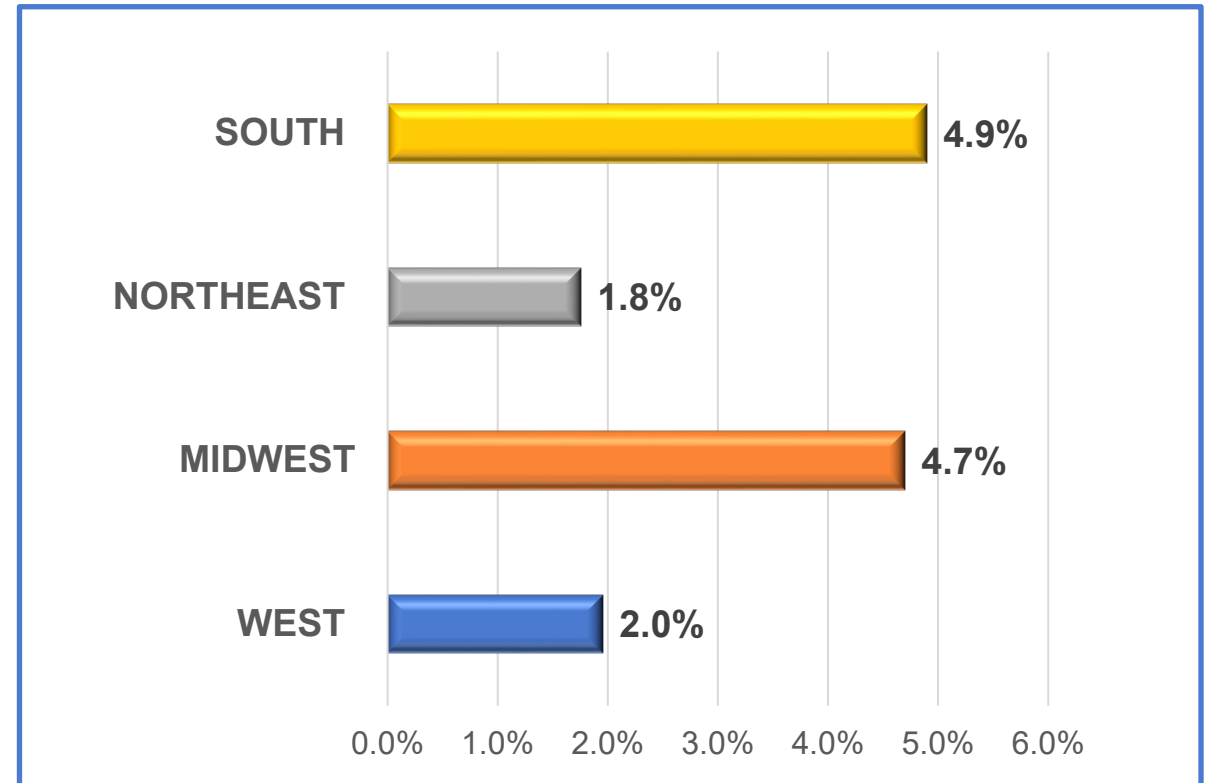
- The Total Pasta & Pizza Sauce combined channel is a \$4.36B category and is performing better than prior year by 3.6%.
- Sales dollars were up in both the Natural Channel +5.8% and MULO +3.5%.
- As in most categories, MULO represents most category sales.

# Total SS Pasta & Pizza Sauce - By Region

Total Dollars and % Category Share by Region



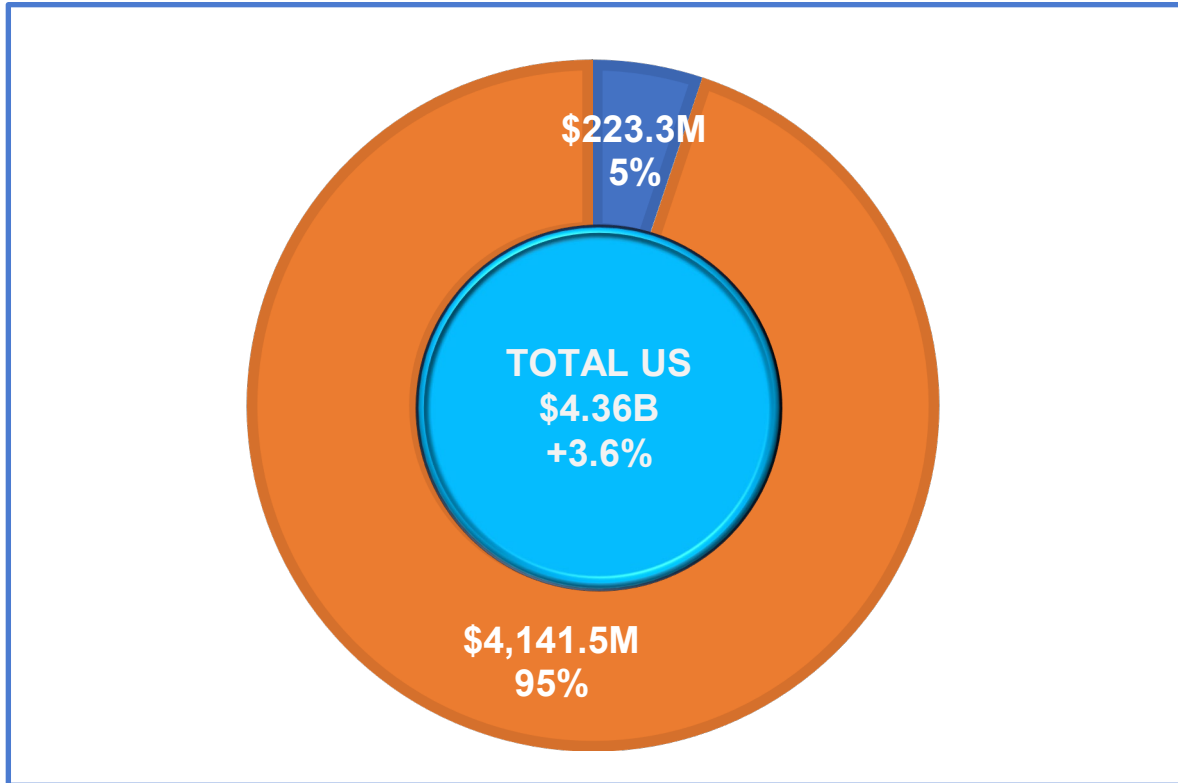
% Dollars Change vs Year Ago



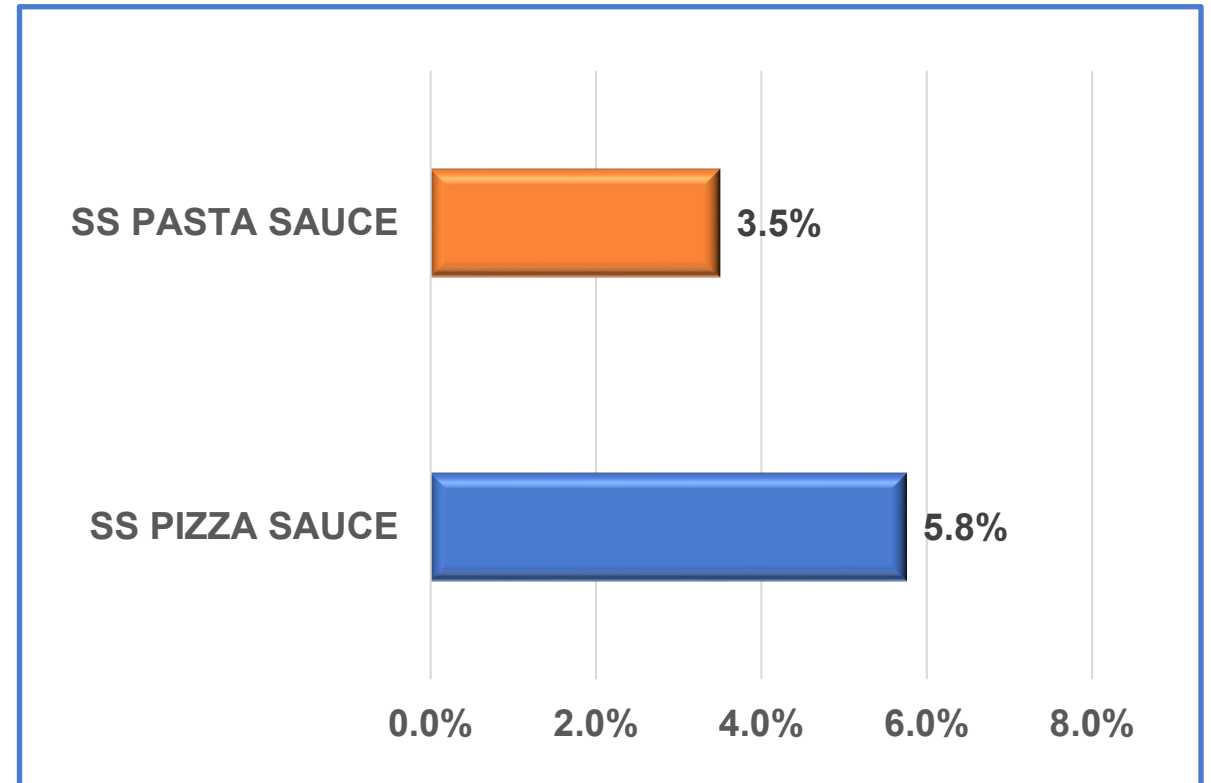
- The South represents 39% of total category sales dollars, followed by the Midwest (21%), the Northeast (20%) and the West (19%).
- All 4 regions experienced dollar growth over the prior year.

# Total SS Pasta & Pizza Sauce - By Segment

Total Dollars and % Category Share by Region



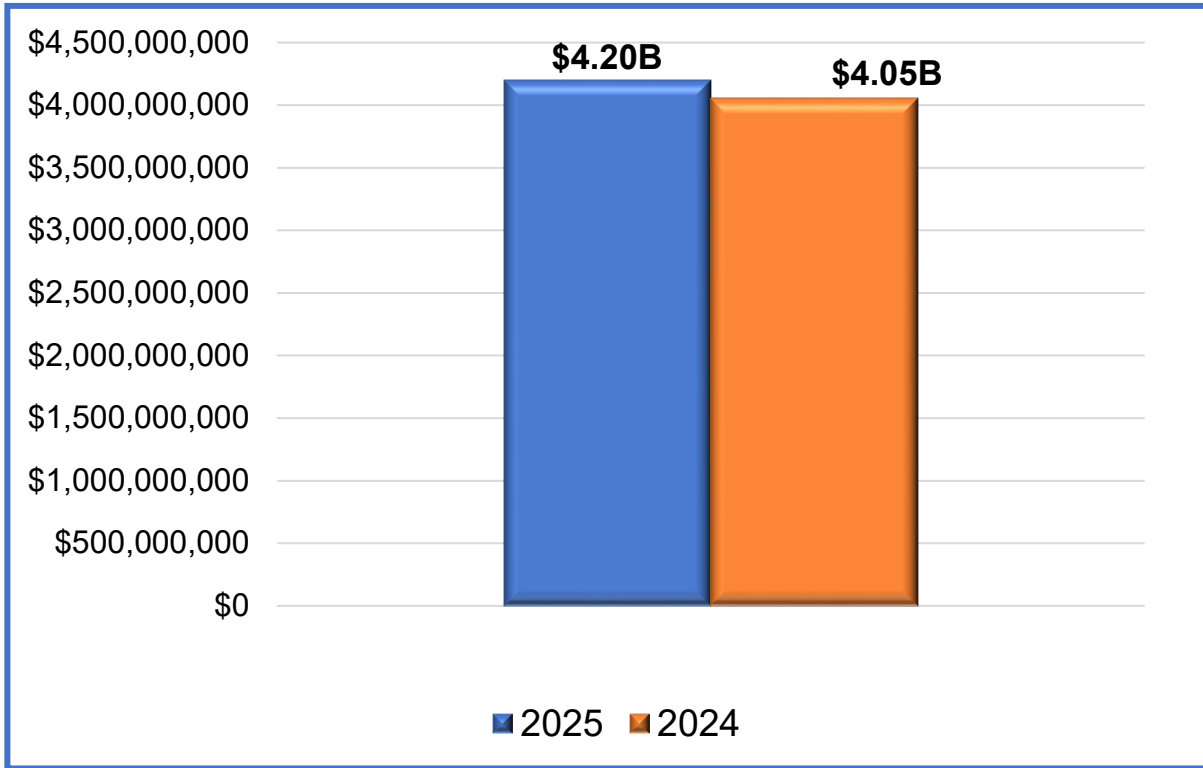
% Dollars Change vs Year Ago



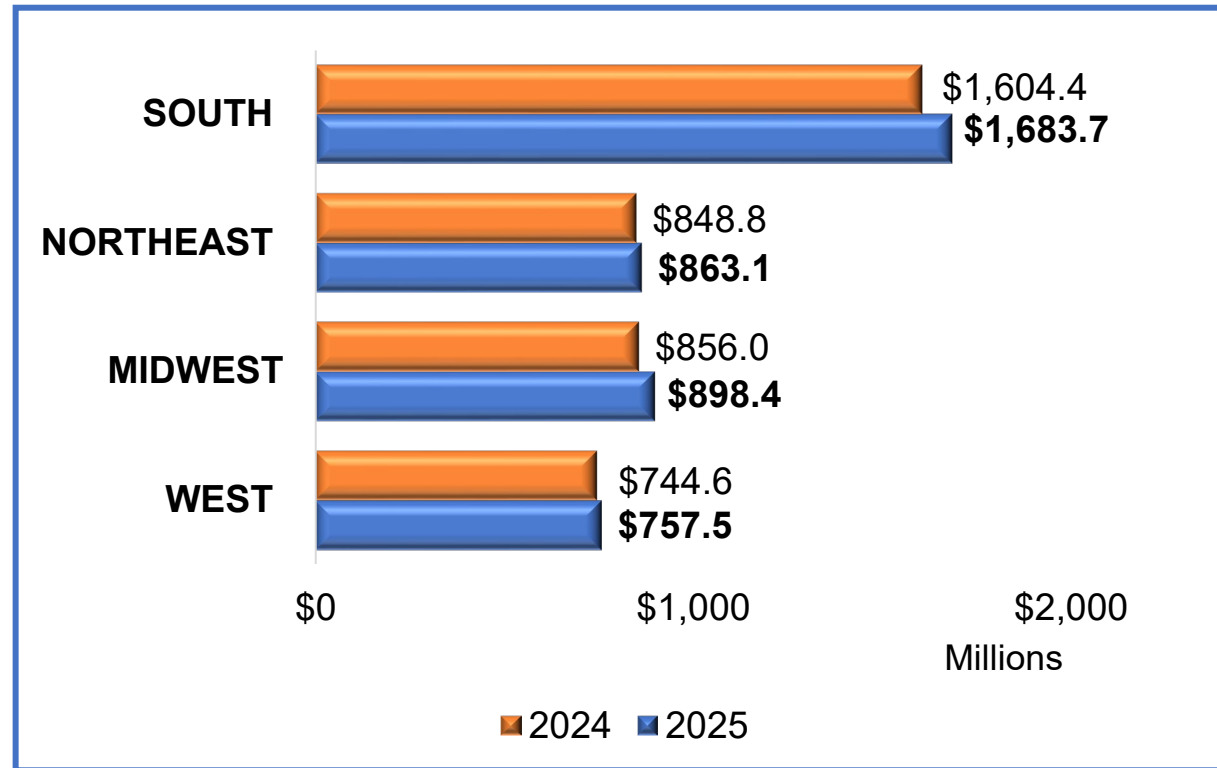
- The combined SS Pasta Sauce subcategory represents 95% of total category sales, while SS Pizza Sauce is responsible for the remaining 5% of category dollar volume.
- Both subcategories are experiencing percent dollar growth over prior year.

# MULO: SS Pasta & Pizza Sauce – Dollar Volume

MULO Dollars



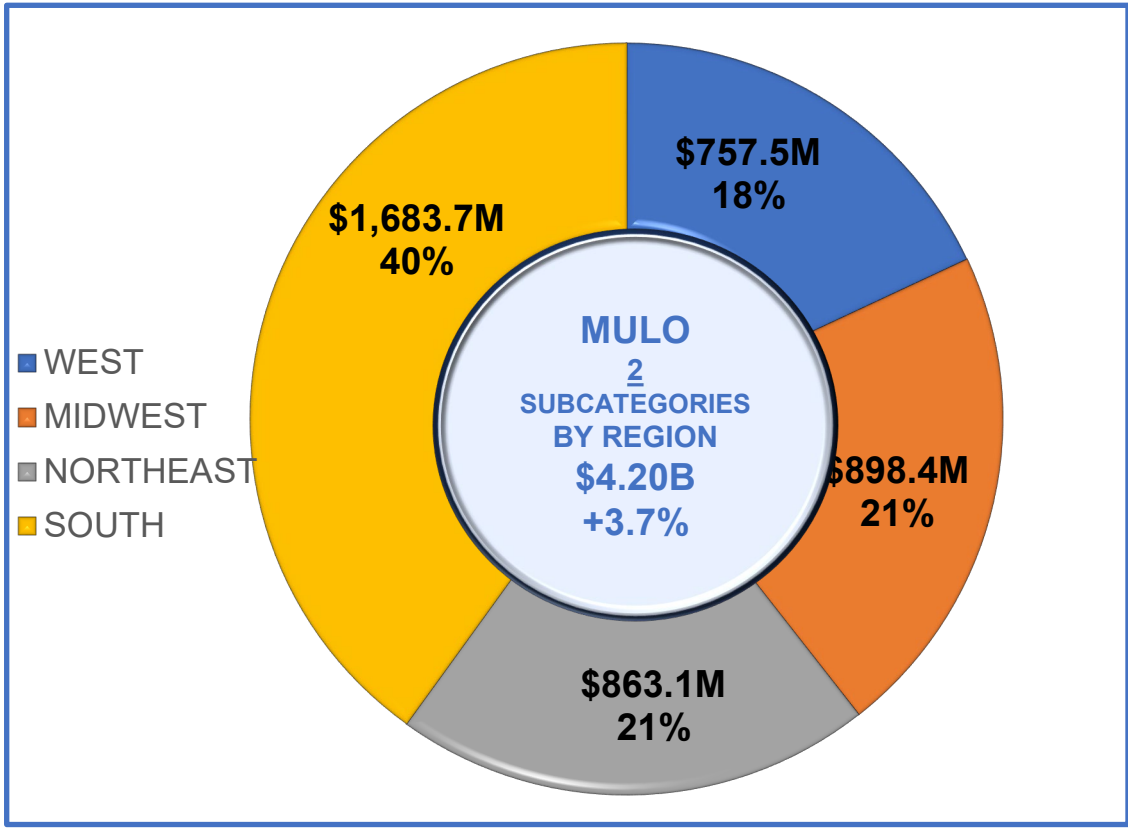
Dollar Change vs Year Ago by Region



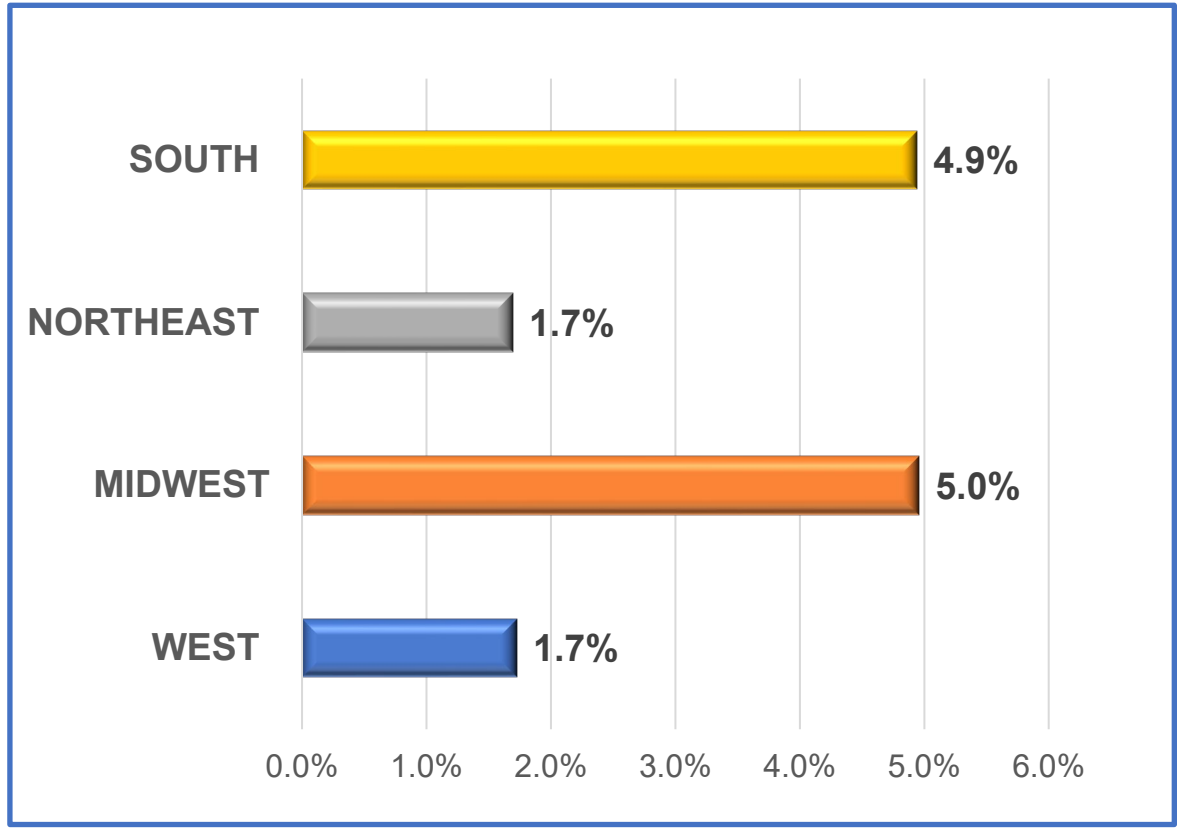
- Total US MULO dollar volume for the category is \$4.20B and is performing better than prior year by 3.7%.
- The South region is the largest \$ volume region, representing 40% of total MULO sales, followed by Midwest, Northeast and West, respectively.
- All 4 regions and Total US are posting sales that are greater than prior year.

# MULO: SS Pasta & Pizza Sauce – Dollar Volume by Region

Combined – 2 Sub-Category \$ Share by Region



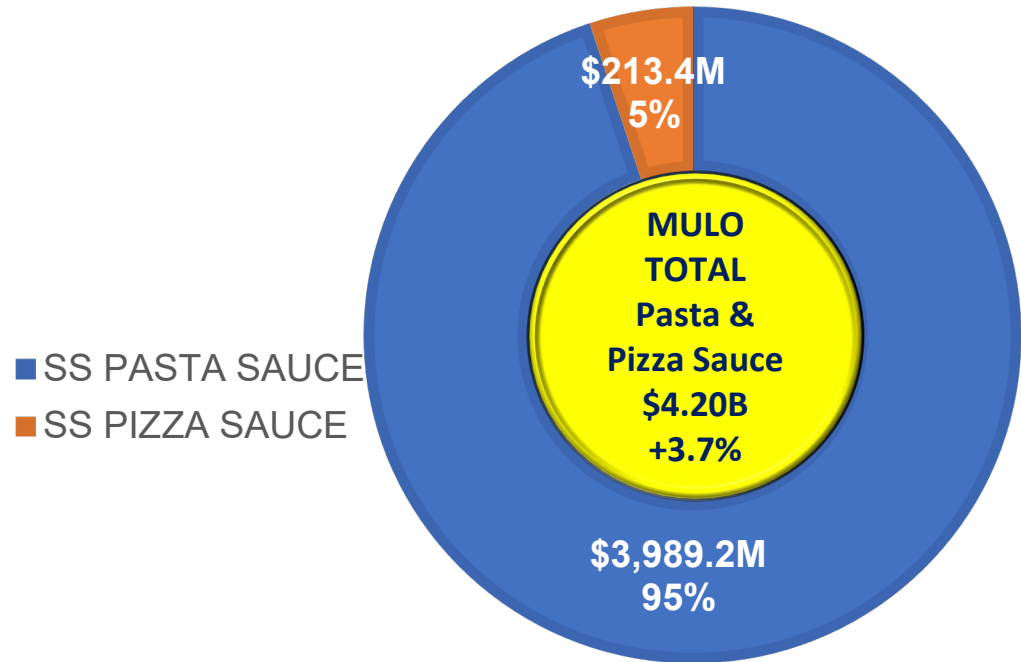
Combined - 2 Sub-Category \$ Share % CHG by Region



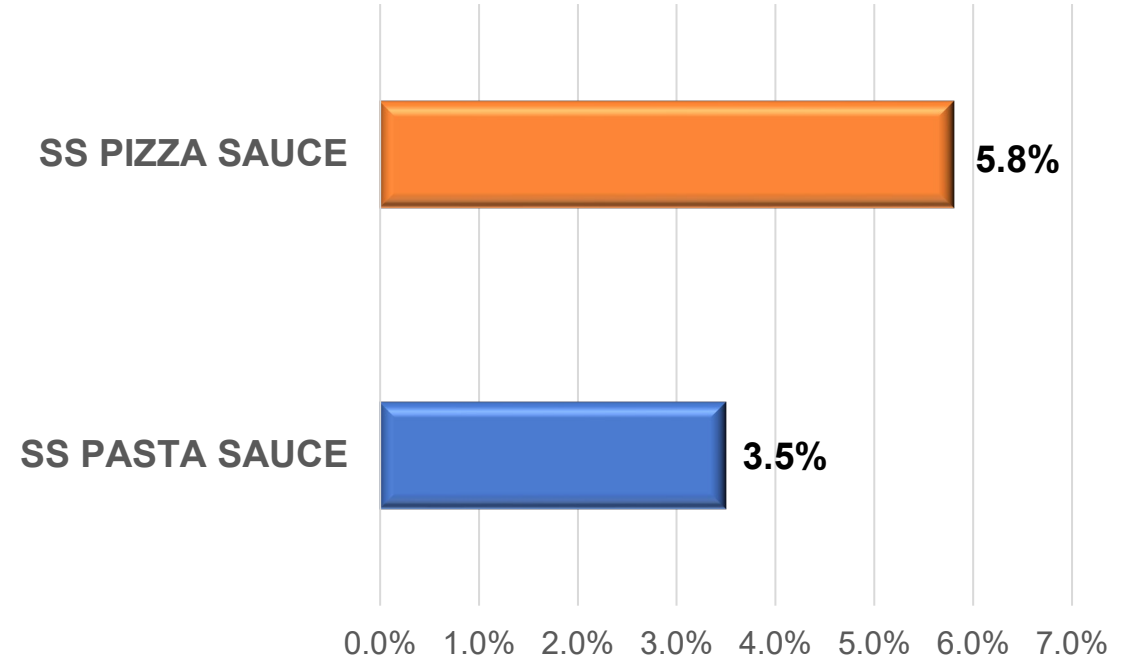
- SS Pasta & Pizza Sauce, represent \$4.20B in annual dollar volume and is growing 3.7%.
- The South Region, the largest dollar share region, is responsible for 40% of overall combined sub-category share, followed by the Midwest, 21%, Northeast, 21% and West, 18%.
- The South and Midwest are experiencing the greatest overall combined sub-category % dollar increase, at or near +5%, followed by the West and Northeast, at 1.7%.

# MULO: SS Pasta & Pizza Sauce - By Subcategory

MULO Subcategory \$ and % Category Share



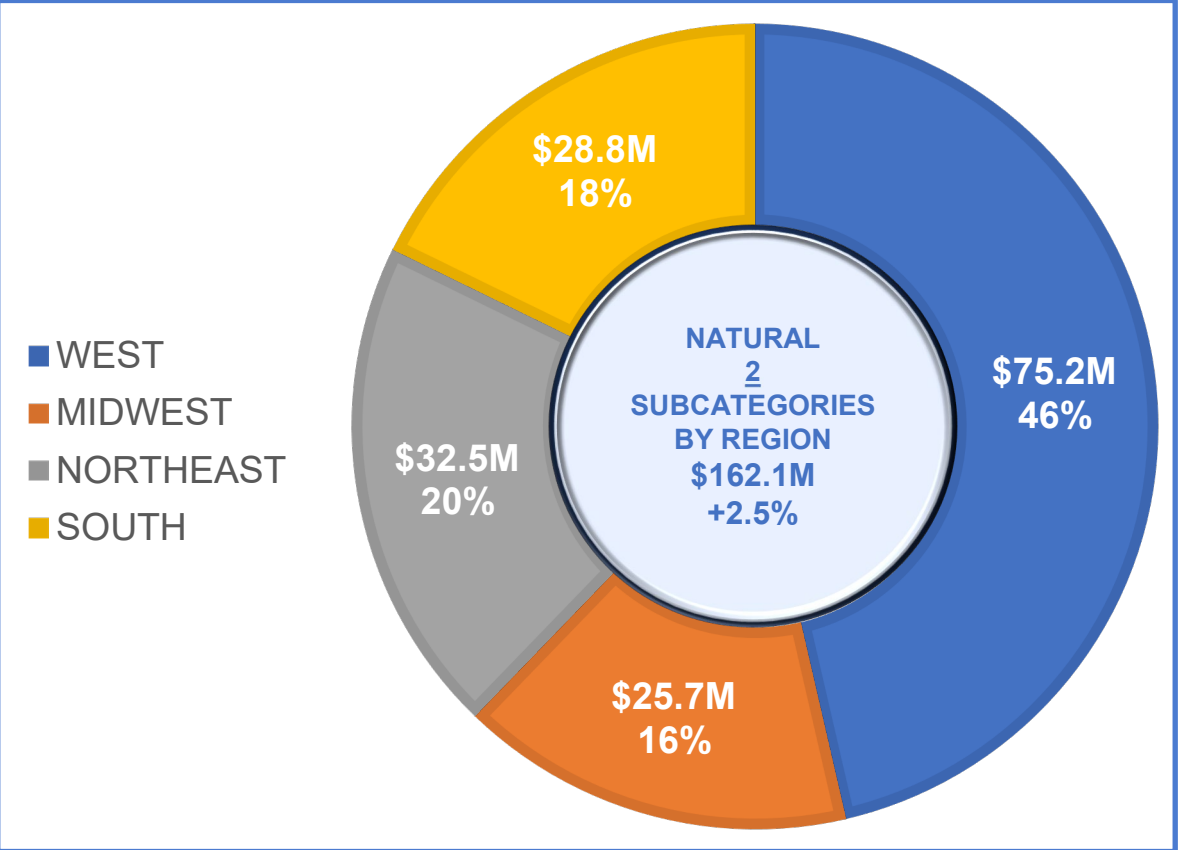
% Dollar Change vs Year Ago



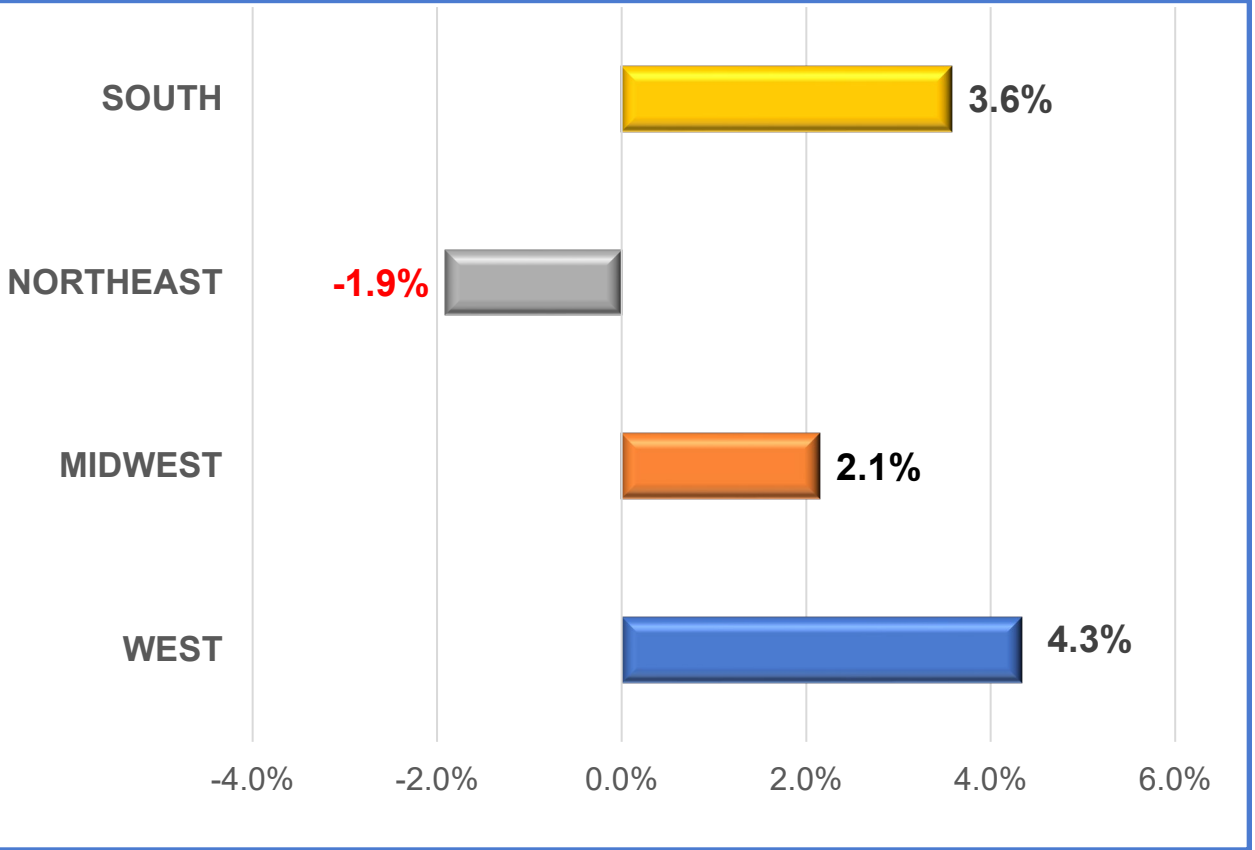
- Pasta Sauce is the largest subcategory, representing \$3.98M, or 95% of total MULO \$ volume, with dollar growth of 3.5%, year over year.
- Pizza Sauce represents the remaining 5% of category volume and is performing positive to prior year, +5.8%.

# NATURAL: SS Pasta Sauce & Pizza Sauce – Dollar Volume by Region

Combined – 2 Sub-Category \$ Share by Region



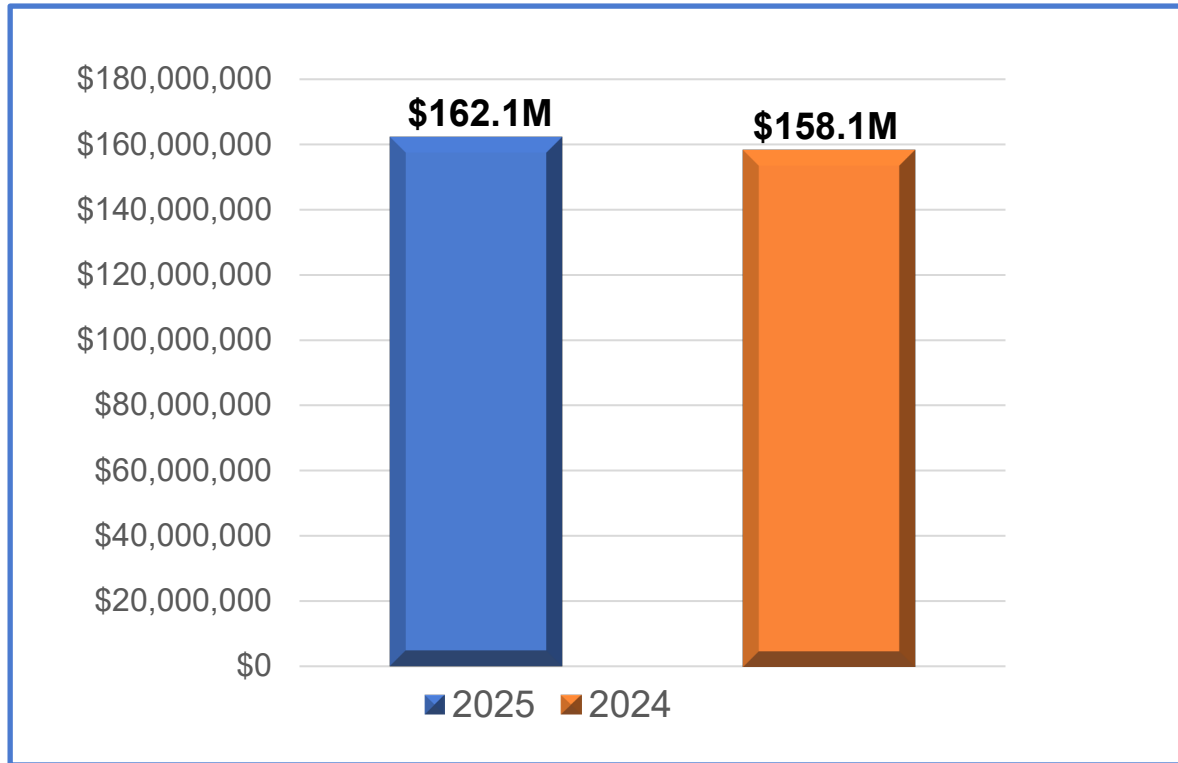
Combined 2 Sub-Category \$ Share % CHG by Region



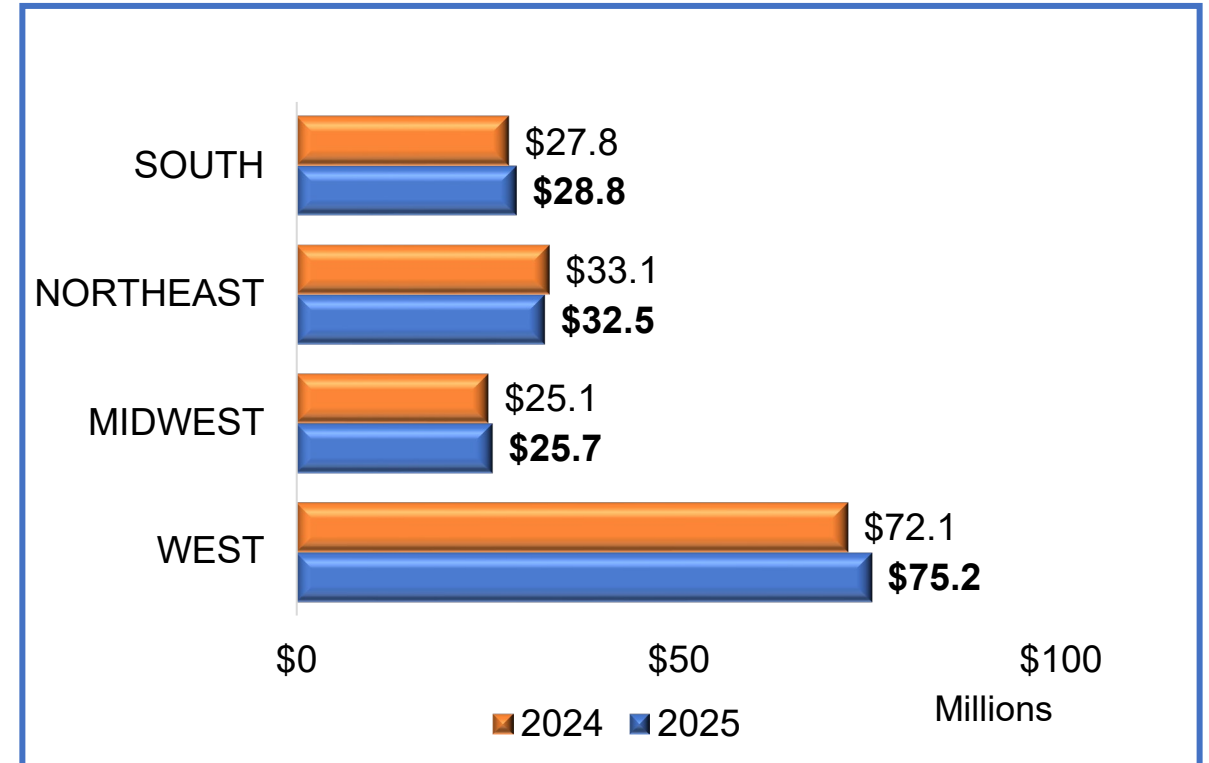
- SS Pasta & Pizza Sauce, represents \$162.1M in annual dollar volume, and is growing +2.5% year over year.
- The West Region, responsible for the largest \$ share, has 46% of overall combined sub-category share, followed by the Northeast, 20%, South, 18% and Midwest, 16%.
- The West on the largest base and share of dollar volume is experiencing the greatest overall combined sub-category % dollar increase at +4.3%, followed by the South at +3.6%, Midwest, +2.1%, and Northeast, which is experiencing decline of -1.9% to prior year.

# Natural Channel: SS Pasta & Pizza Sauce – Comparative Performance

Natural Channel Dollars



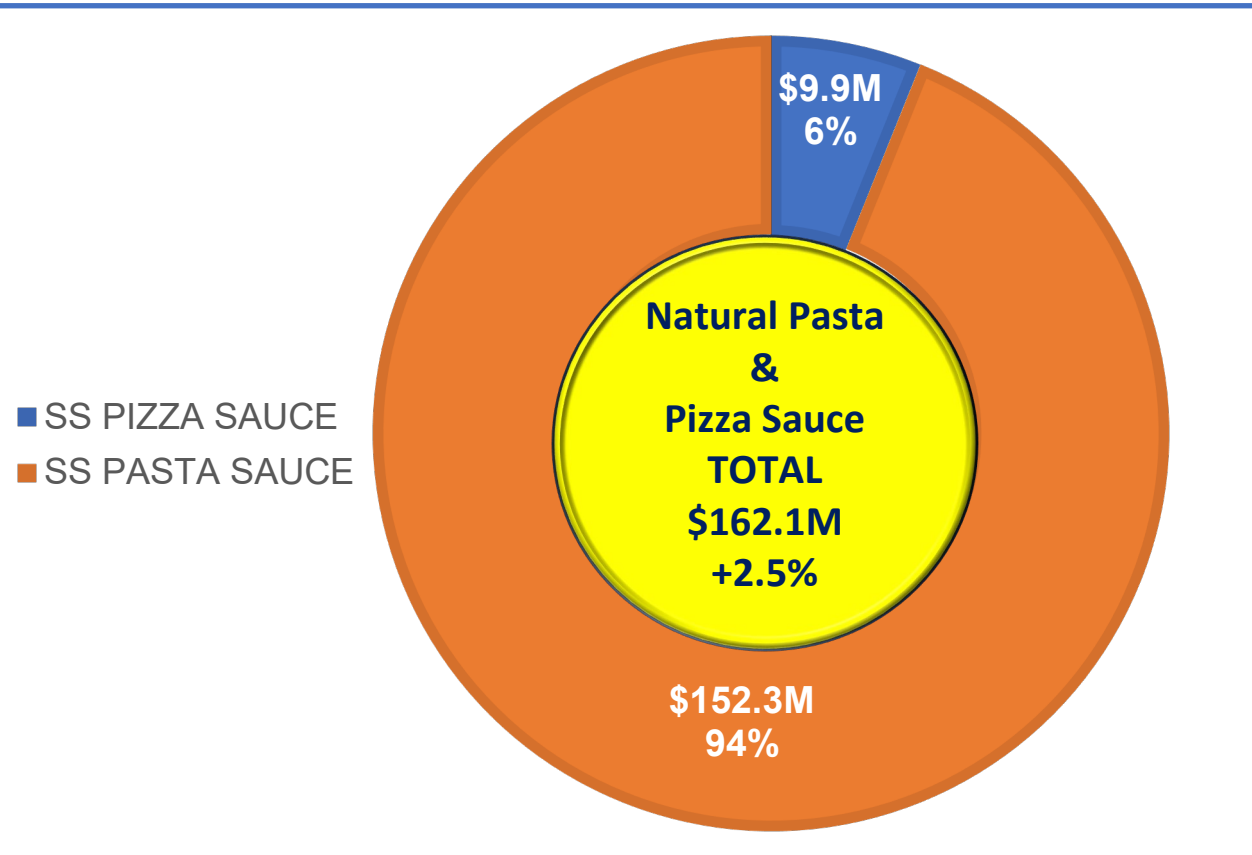
Dollar Change vs Year Ago by Region



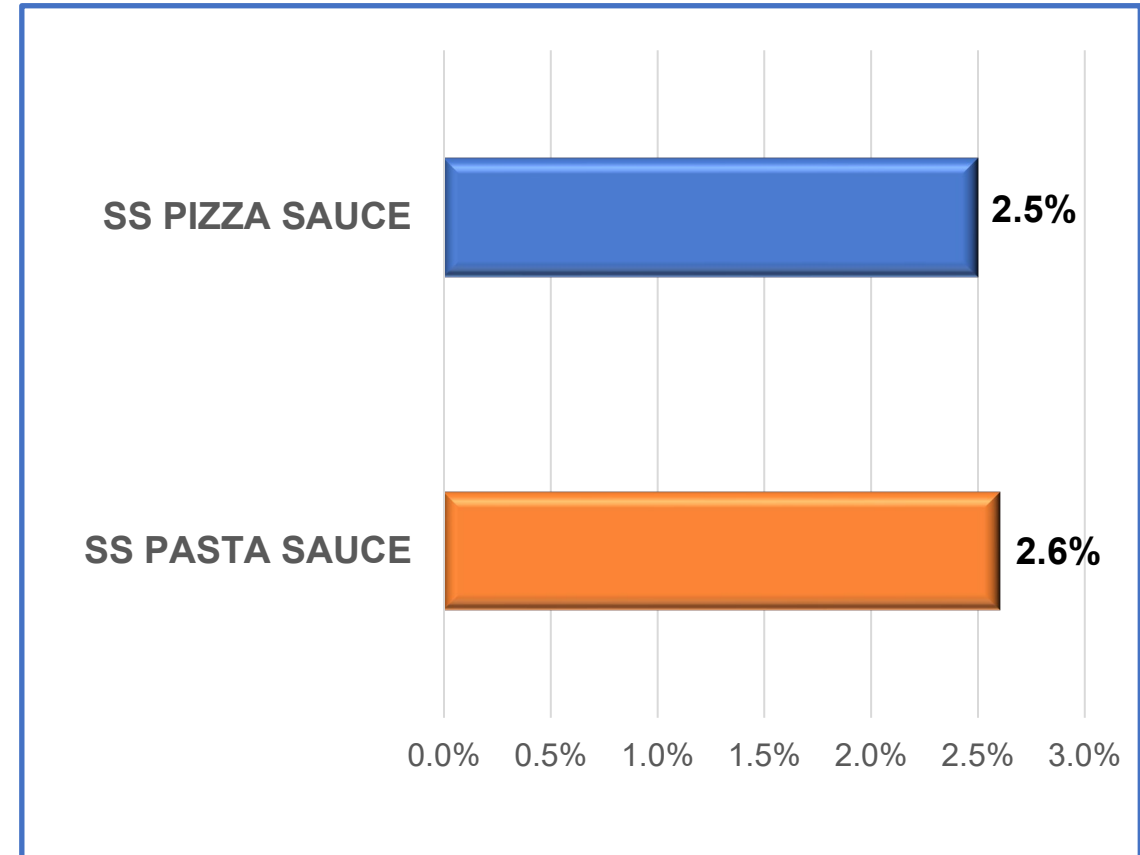
- Natural Channel \$ volume for the category is \$162.1M and has grown 2.5% over prior year.
- The West region is the largest \$ volume region, representing 46% of total Natural Channel category sales, followed by Northeast, South and Midwest regions, respectively.
- The West is experiencing the greatest overall combined sub-category % dollar increase, followed by the South, and Midwest; Northeast is the only region in dollar decline to prior year.

# Natural: SS Pasta & Pizza Sauce - By Subcategory

Natural Subcategory \$ and % Category Share



% Dollar Change vs Year Ago



- Pasta Sauce is the largest subcategory, representing \$152.5M, or 94% of total Natural dollar volume, with growth of +2.6% to prior year.
- Pizza Sauce represents the remaining 6% of category volume and is performing positive to prior year, +2.5%.

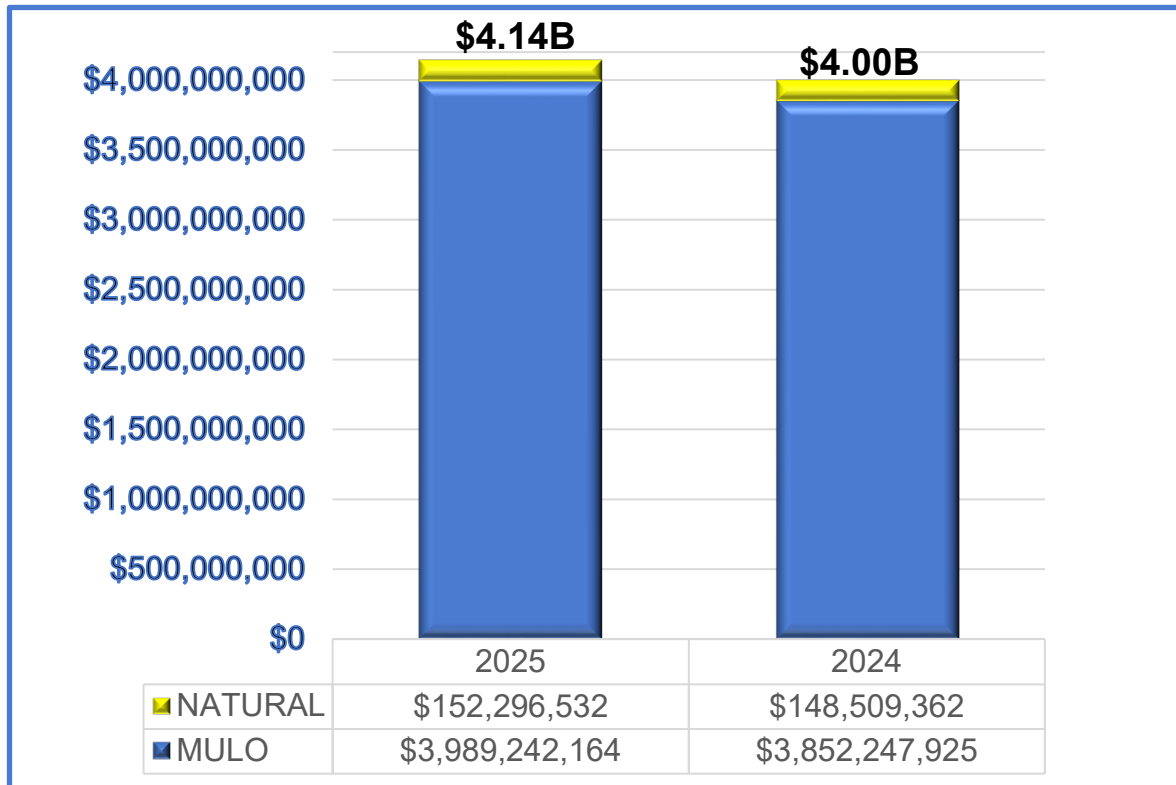
# SS PASTA SAUCE

## Sub-category Performance

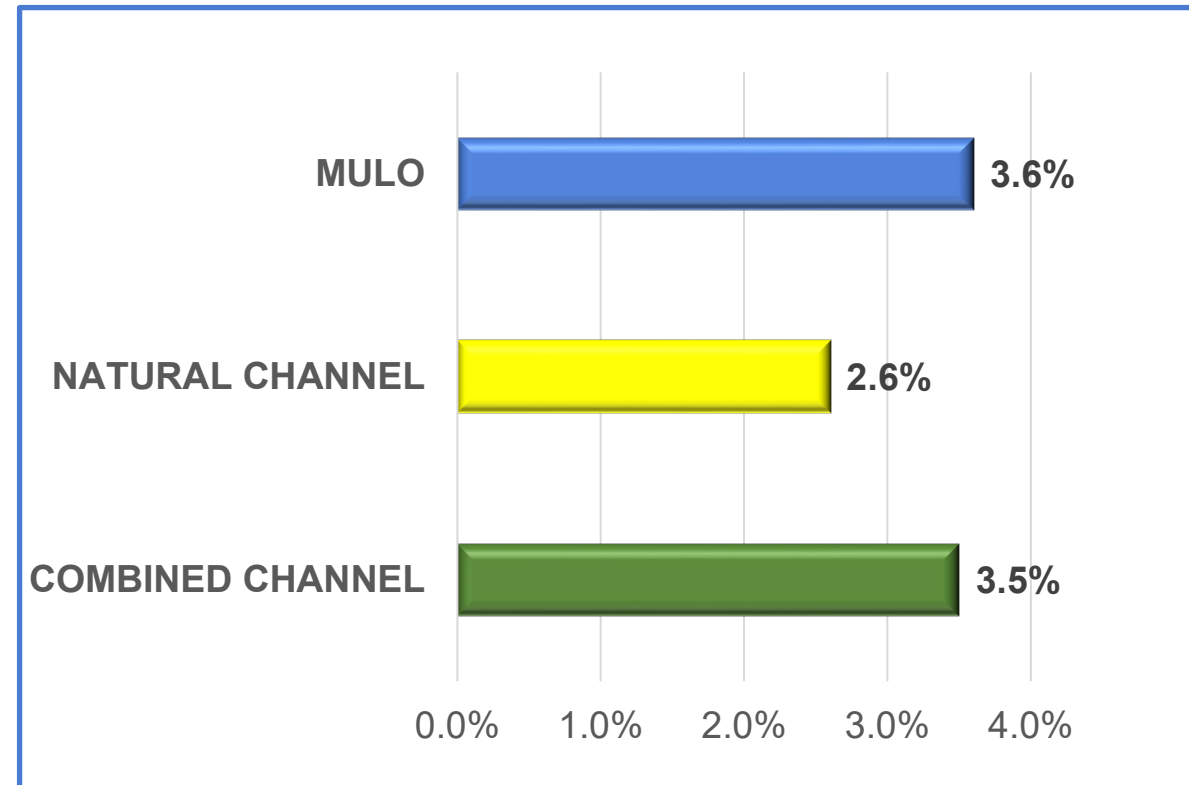
*SPINS Satori - 52 Weeks Ending June 15, 2025*

# Total US SS Pasta Sauce

Total US Dollars



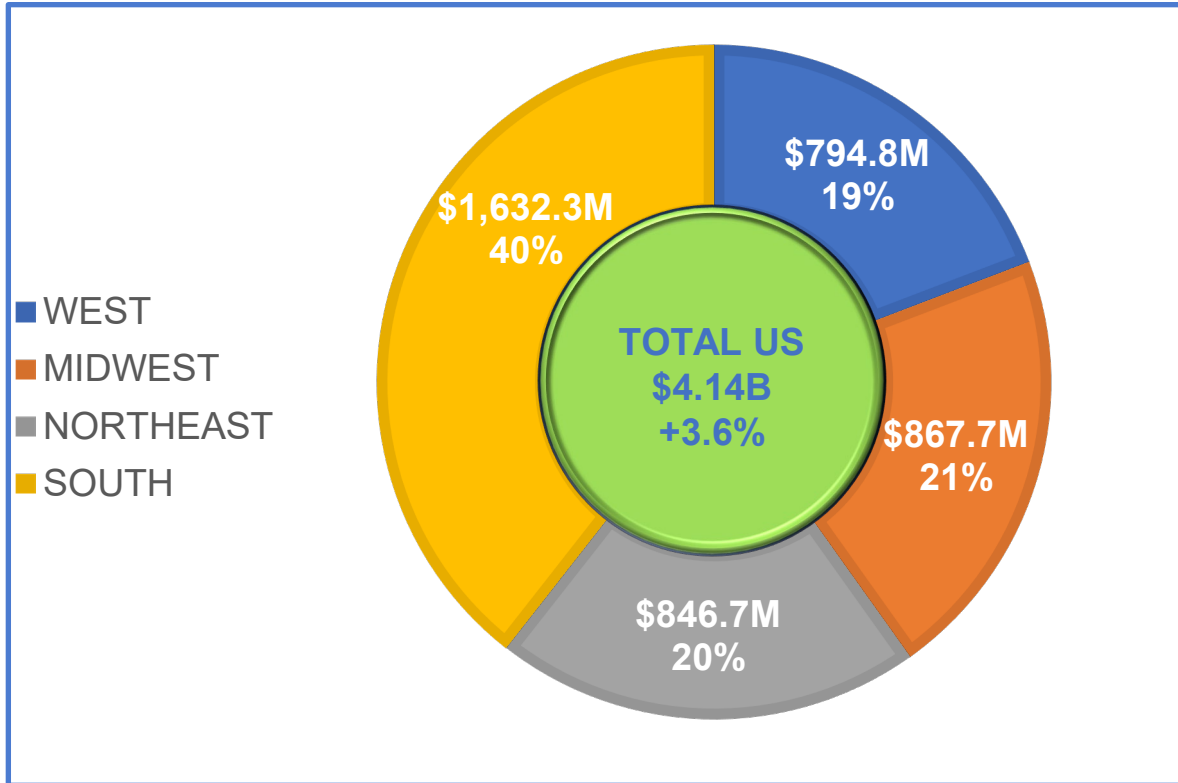
% Dollar Change vs Year Ago



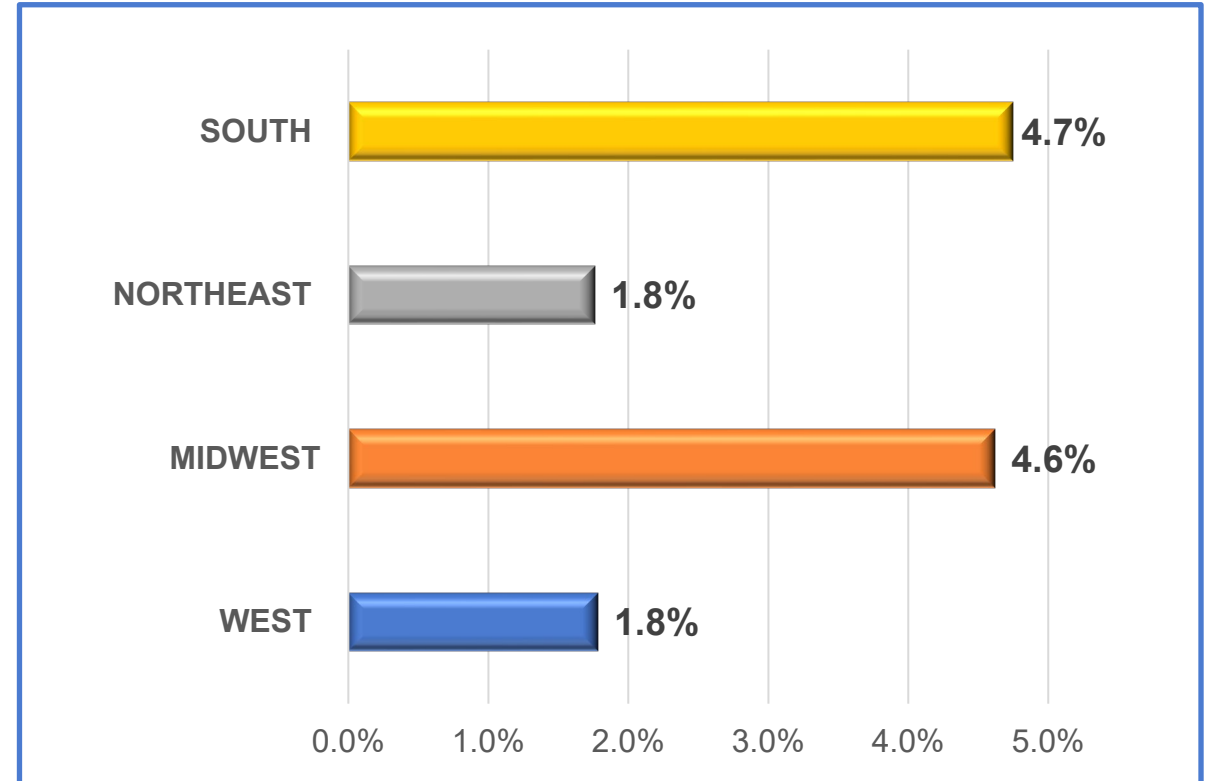
- The Total US SS Pasta Sauce combined channel is a \$4.14B category and is performing better than prior year by 3.5%.
- Sales dollars were up in both the Natural Channel at +2.6% and MULO at +3.6%.
- As in all categories, MULO represents most category sales.

# Total SS Pasta Sauce- By Region

Total Dollars and % Category Share by Region



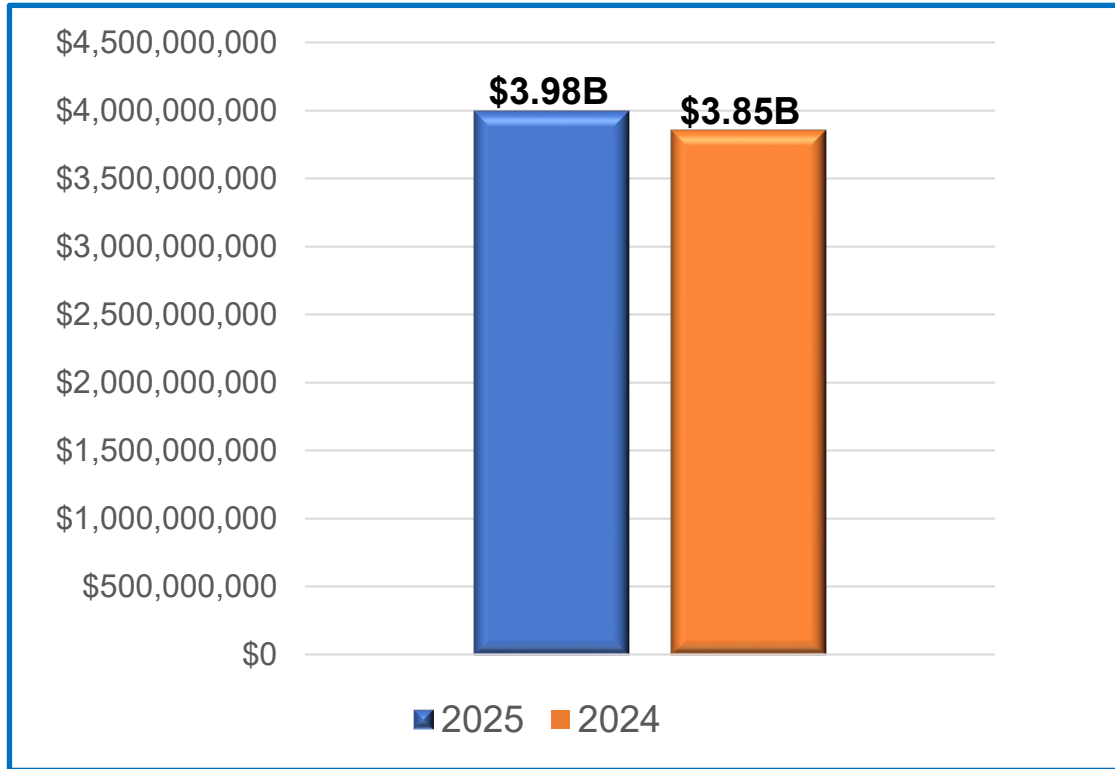
% Dollars Change vs Year Ago



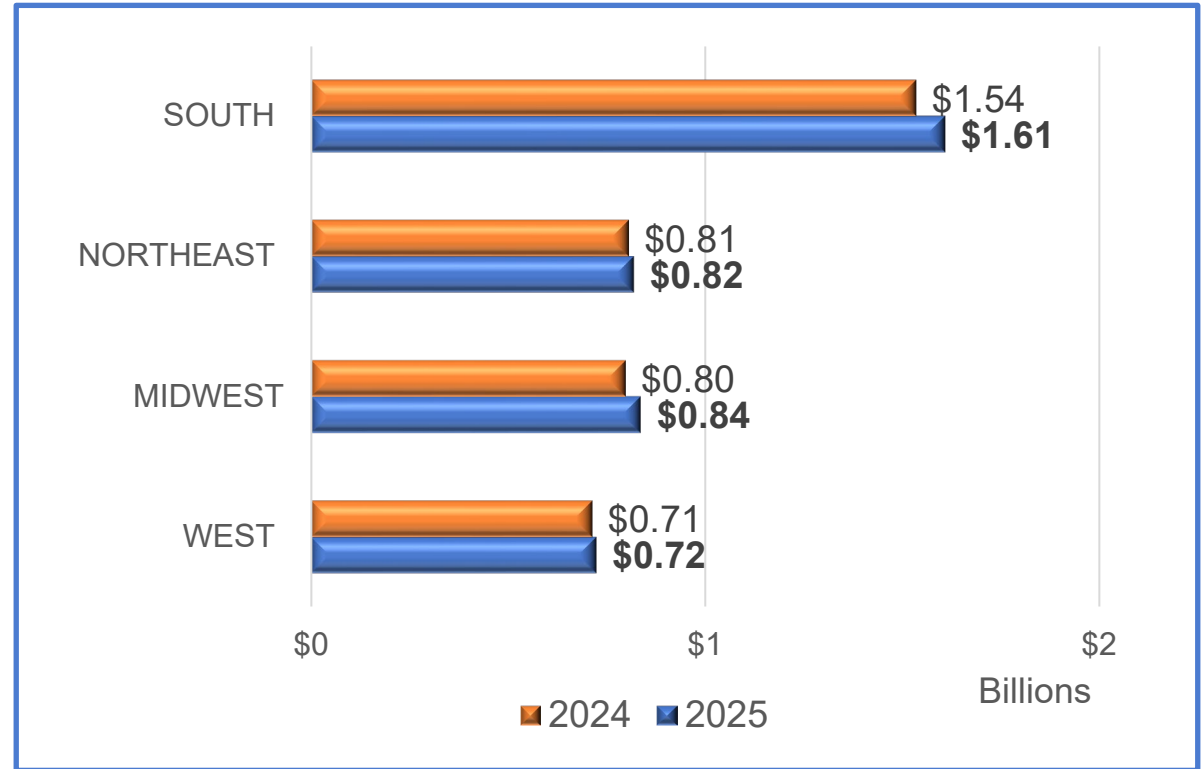
- The South represents 40% (\$1.6B) of total category sales dollars, followed by the Midwest 21%, the Northeast 20%, and the West 19%.
- All 4 regions experienced growth over the prior year.

# Total US MULO: SS Pasta Sauce - Subcategory

MULO Total US Dollars



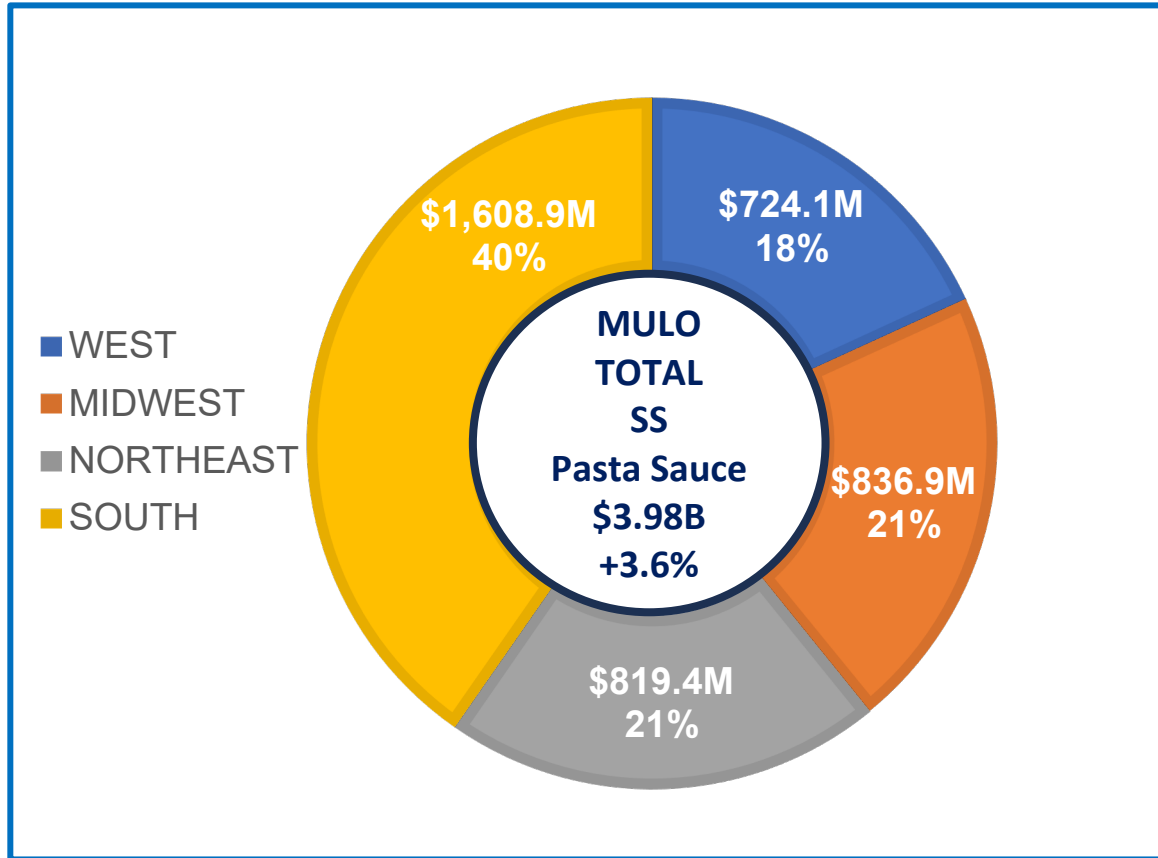
Dollar Change vs Year Ago



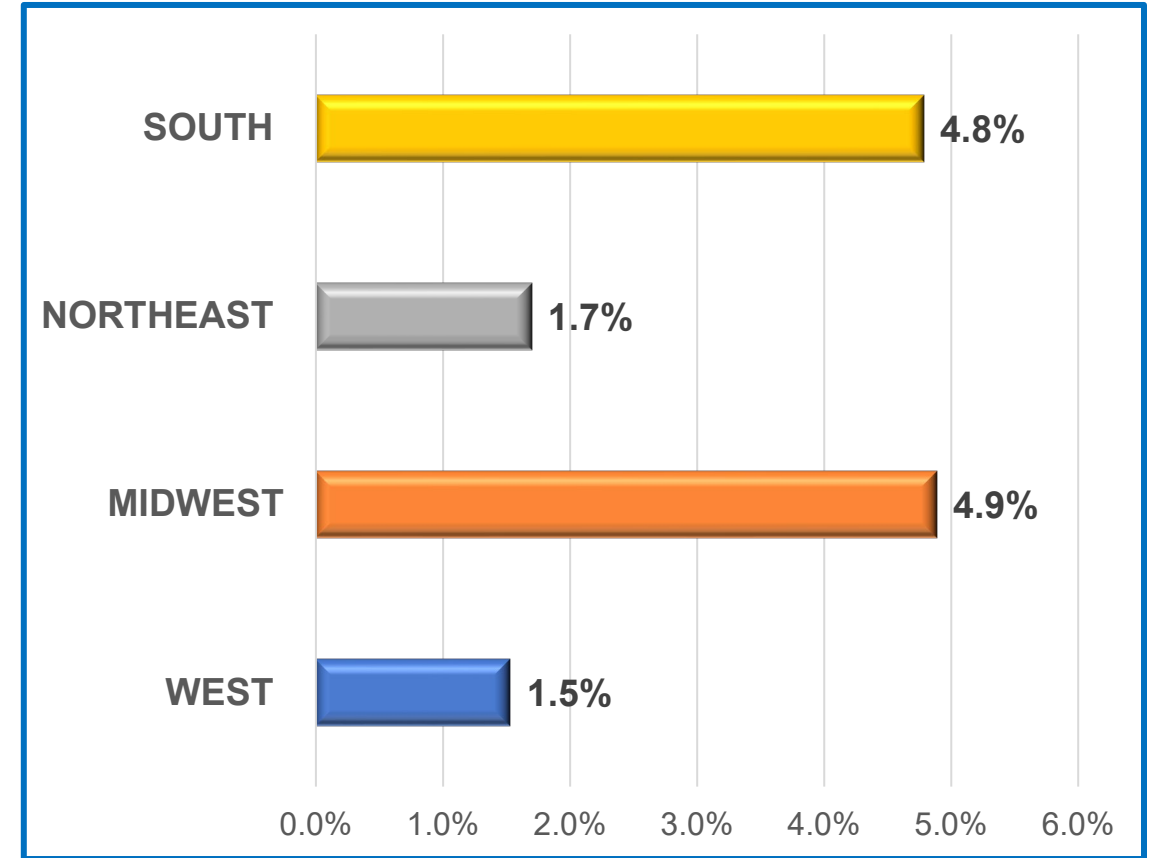
- Total US MULO \$ volume for SS Pasta Sauce is \$3.98B and grew +3.6% over prior year.
- The South region is the largest \$ volume region, followed by Midwest, Northeast, West, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year, but the South region has experienced the largest dollar increase on the largest base of dollar volume for the subcategory.

# Total US MULO: Pasta Sauce - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South is the most highly developed region for this subcategory, responsible for 40% of \$ volume, with \$ growth of 4.8%.
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining 60% of \$ volume with respective growth of 1.7%, 1.5%, and 4.9%.

# MULO: SS Pasta Sauce

## Top Markets Northeast Census Region

Geography	Dollars	Dollars, Yago	Dollars %		Units %		TDP	TDP, Yago	ARP	ARP, Yago
			Chg, Yago	Units	Units, Yago	Chg, Yago				
NEW YORK, NY - MULO	\$215,887,871	\$214,786,149	0.5	54,090,079	54,343,536	-0.5	\$12,365.50	\$12,562.60	\$3.99	\$3.95
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$105,546,477	\$103,568,362	1.9	29,236,620	29,218,131	0.1	\$12,513.60	\$13,388.50	\$3.61	\$3.54
PHILADELPHIA, PA - MULO	\$101,817,701	\$100,273,207	1.5	29,490,129	29,413,555	0.3	\$14,720.50	\$14,875.30	\$3.45	\$3.41
BOSTON, MA - MULO	\$92,830,526	\$92,822,623	0.0	23,276,555	23,320,019	-0.2	\$14,203.70	\$14,554.00	\$3.99	\$3.98
HARRISBURG/SCRANTON, PA - MULO	\$69,219,868	\$67,095,605	3.2	22,385,657	21,941,426	2.0	\$14,626.00	\$14,646.30	\$3.09	\$3.06
NEW ENGLAND - MULO	\$68,204,713	\$66,371,704	2.8	18,720,085	18,698,216	0.1	\$15,516.80	\$15,437.00	\$3.64	\$3.55
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$53,468,815	\$52,637,886	1.6	14,814,050	14,709,156	0.7	\$13,516.60	\$13,921.20	\$3.61	\$3.58
BUFFALO/ROCHESTER, NY - MULO	\$40,306,877	\$38,790,183	3.9	13,408,983	13,234,041	1.3	\$11,661.60	\$11,635.50	\$3.01	\$2.93
PITTSBURGH, PA - MULO	\$39,591,765	\$38,610,232	2.5	12,081,571	12,106,291	-0.2	\$12,936.60	\$12,960.70	\$3.28	\$3.19
ALBANY, NY - MULO	\$21,929,157	\$21,085,722	4.0	6,114,397	6,105,864	0.1	\$16,152.30	\$15,643.60	\$3.59	\$3.45
SYRACUSE, NY - MULO	\$20,886,453	\$20,011,600	4.4	6,561,019	6,499,783	0.9	\$13,066.40	\$12,824.30	\$3.18	\$3.08
PROVIDENCE, RI - MULO	\$15,778,014	\$15,835,456	-0.4	4,269,273	4,225,282	1.0	\$13,194.20	\$13,944.90	\$3.70	\$3.75

- New York is the largest market for SS Pasta Sauce, posting positive dollar sales growth of 0.5%, but a decline in unit growth, -0.5%.
- New England, the 6<sup>th</sup> largest market, responsible for \$68M in sales, is showing dollar growth of +2.8% and unit growth of +0.1%.
- Syracuse, the 11<sup>th</sup> ranked market in \$ sales, is showing the highest dollar growth, +4.4% and unit growth of +0.9%.

# MULO: SS Pasta Sauce

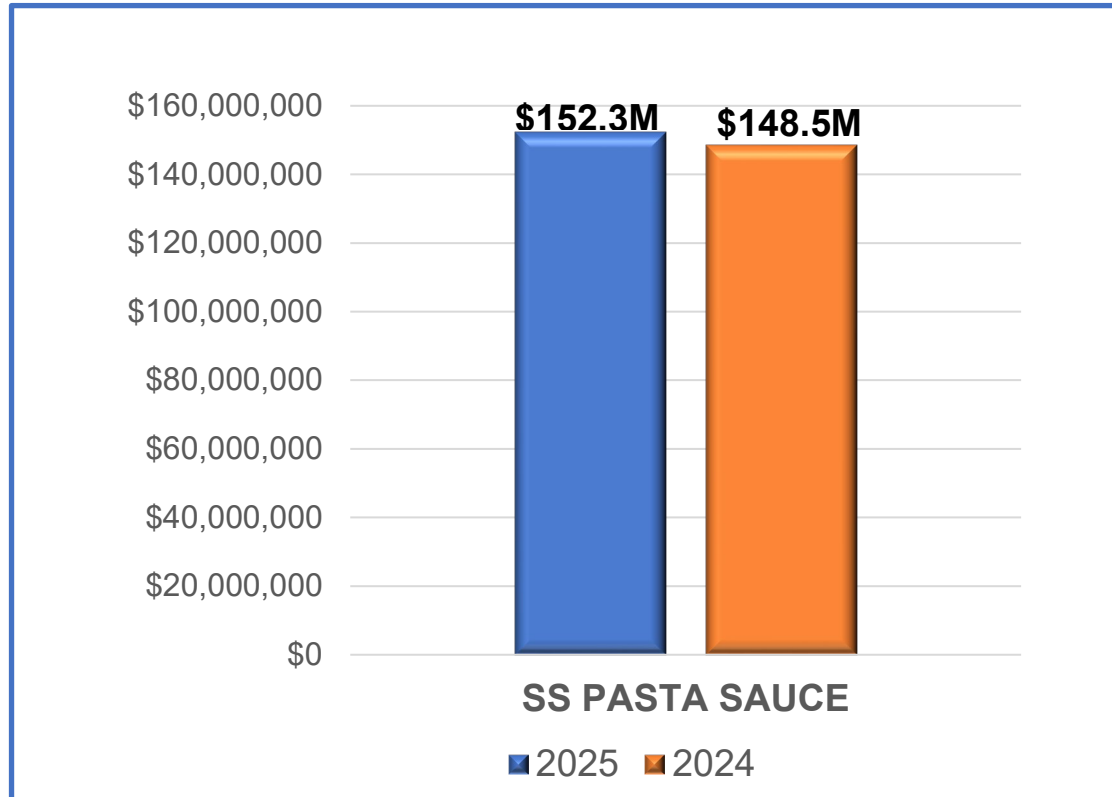
## Top 10 Brands Northeast Census Region

Description	Dollars		Dollars %	Units		Units %	Average		ARP	
	Dollars	Dollars, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Avg % ACV	Items Selling	ARP	Yago
<b>SS PASTA SAUCE</b>	<b>\$819,445,179</b>	<b>\$805,783,596</b>	<b>1.7</b>	<b>229,974,115</b>	<b>229,295,404</b>	<b>0.3</b>			<b>\$3.56</b>	<b>\$3.51</b>
RAOS HOMEMADE	\$192,848,651	\$182,649,320	5.6	25,565,405	23,805,083	7.4	89	16.5	\$7.54	\$7.67
PREGO	\$124,884,779	\$124,264,130	0.5	40,220,710	39,278,113	2.4	92.6	22.5	\$3.10	\$3.16
PRIVATE LABEL	\$102,164,657	\$95,722,351	6.7	49,276,587	46,812,797	5.3	85.2	15	\$2.07	\$2.04
RAGU	\$99,416,889	\$100,228,156	-0.8	32,172,486	32,558,162	-1.2	90.4	17.4	\$3.09	\$3.08
BERTOLLI	\$51,625,054	\$53,000,824	-2.6	14,810,547	16,409,851	-9.7	86.1	9.9	\$3.49	\$3.23
CLASSICO	\$46,822,335	\$48,364,445	-3.2	12,806,297	13,299,803	-3.7	78	9.5	\$3.66	\$3.64
FRANCESCO RINALDI	\$21,508,787	\$22,949,774	-6.3	10,807,758	11,378,669	-5	54.5	7.4	\$1.99	\$2.02
CARBONE	\$20,530,176	\$11,765,300	74.5	2,815,809	1,450,963	94.1	63.8	6.6	\$7.29	\$8.11
VICTORIA	\$18,881,421	\$20,069,077	-5.9	3,037,537	3,257,103	-6.7	44.8	6.3	\$6.22	\$6.16
HUNTS	\$10,519,860	\$12,047,071	-12.7	7,003,282	8,154,903	-14.1	63	4	\$1.50	\$1.48

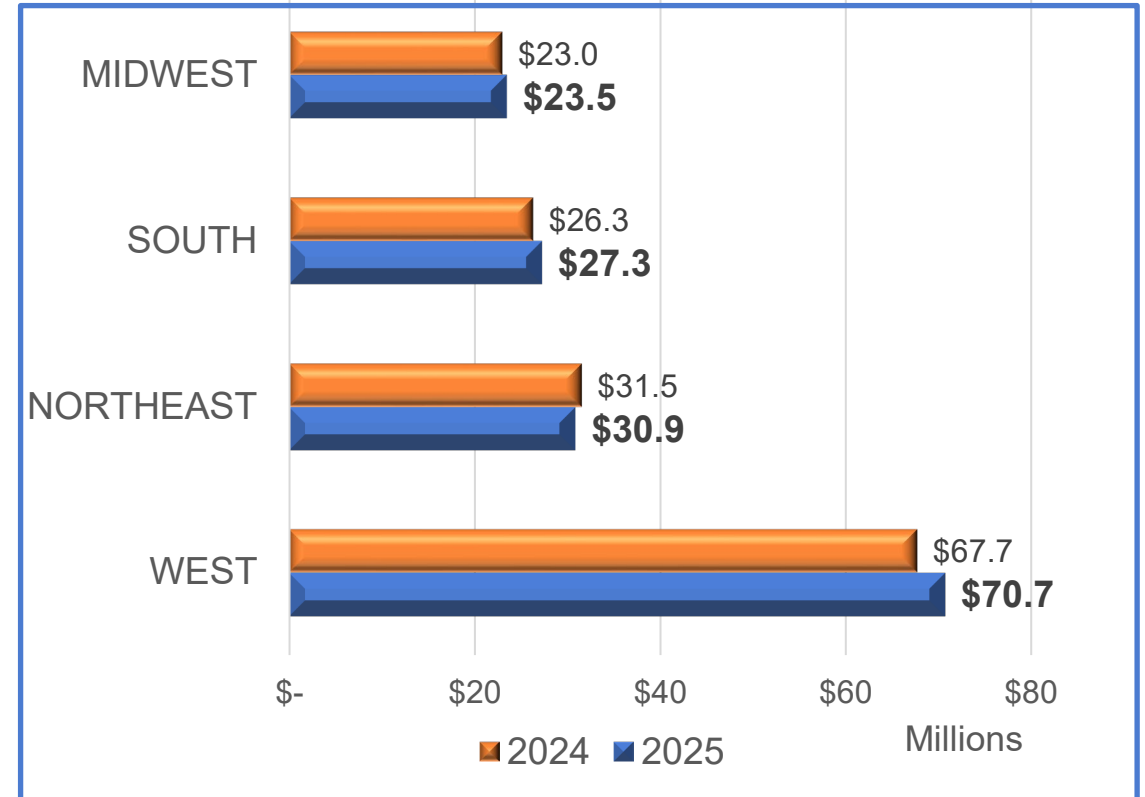
- MULO Northeast SS Pasta Sauce is showing +1.7% growth over prior year in dollar volume with unit sales at +0.3%.
- Private Label brands (retailer brands produced by others) are highly developed in \$ sales and growing at 6.7% in dollar sales and 5.3% in unit sales.
- Raos Homemade, the lead brand, growing in both dollar and unit sales, commands 24% share of total segment dollar sales in the Northeast.
- Carbone, the 8<sup>th</sup> ranked brand in dollar volume, is experiencing explosive growth in both dollar & unit Volume, at +74.5% and +94.1%, respectively.

# Natural Channel: Pasta Sauce - Subcategory

Natural Channel Total US Dollars



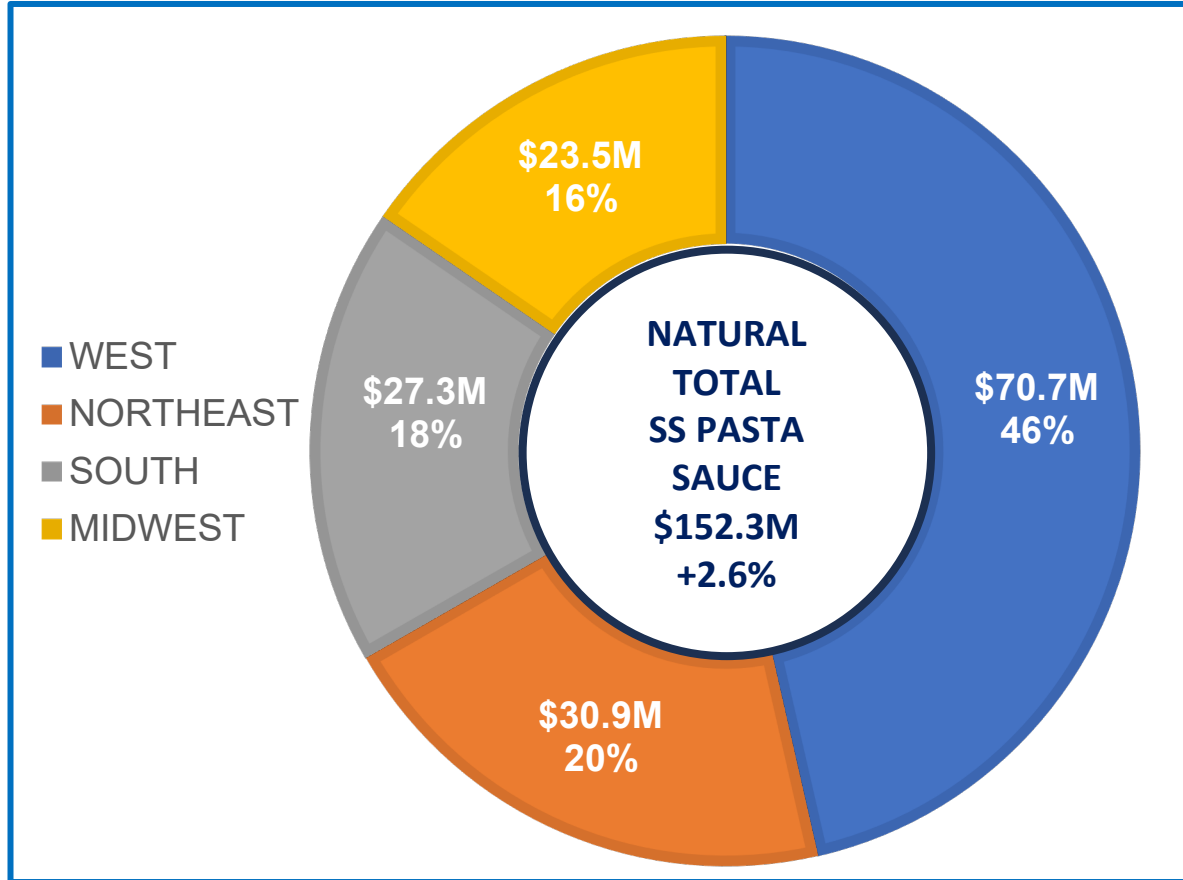
Dollar Change vs Year Ago



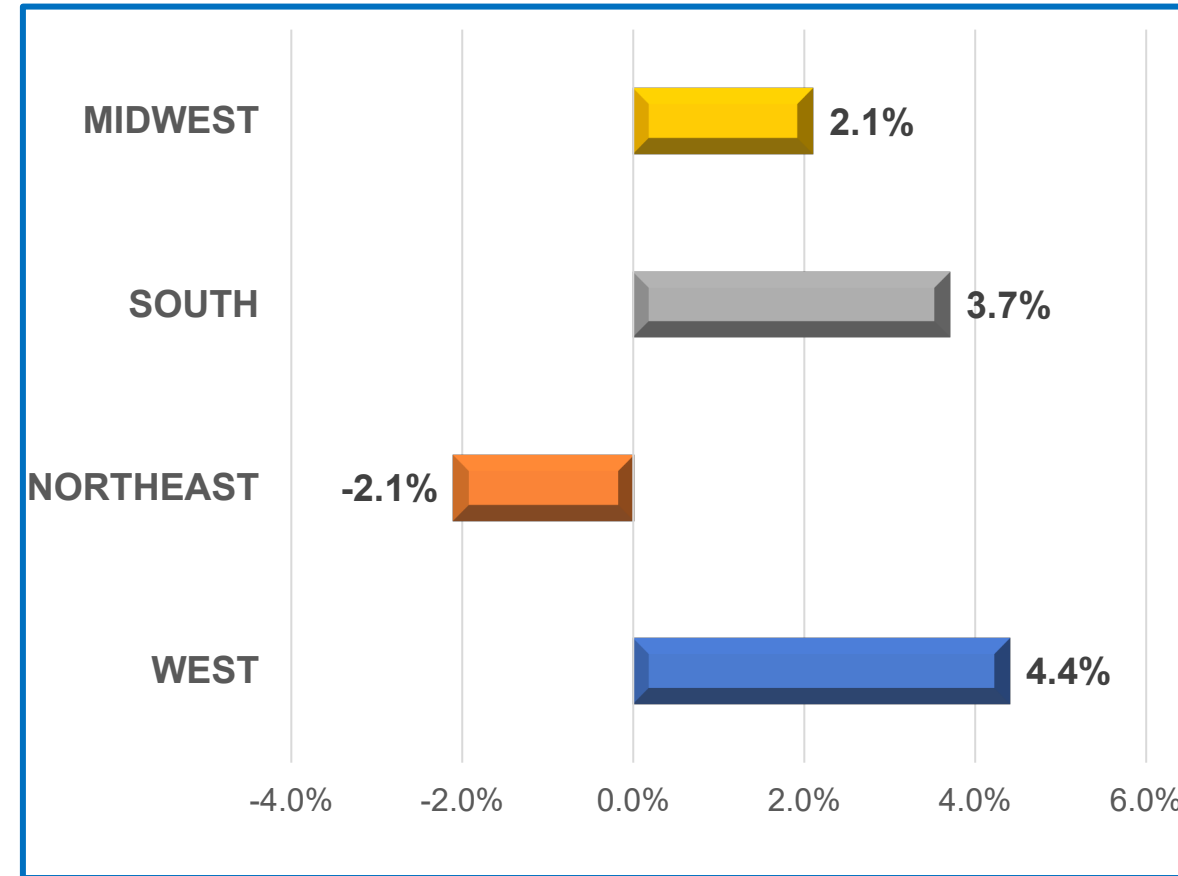
- Total Natural Channel \$ volume for the SS Pasta Sauce subcategory is \$152.3M and is up 2.6% over prior year.
- The West region is the largest \$ volume region, followed by the Northeast, South, and Midwest, respectively.
- The West, South and Midwest regions are posting positive dollar sales increases to prior year; however, the Northeast region is showing dollar sales declines to prior year, -2.1%.

# Natural Channel: SS Pasta Sauce - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region, the most highly developed region for this subcategory, is responsible for 46% of \$ volume and is up +4.4% to prior year.
- The 3 remaining regions, Northeast, South and Midwest, are responsible for the remaining 54% of \$ volume, with respective growth and declines of -2.1%, +3.7%, and +2.1%.

## Natural Channel: SS Pasta Sauce Top 10 Brands Northeast Census Region

Description	Dollars %				Units %			Average		
	Dollars	Dollars, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Avg % ACV	Items Selling	ARP	ARP, Yago
<b>SS PASTA SAUCE</b>	<b>\$30,865,294</b>	<b>\$31,536,254</b>	<b>-2.1</b>	<b>4,665,223</b>	<b>4,790,016</b>	<b>-2.6</b>			<b>\$6.62</b>	<b>\$6.58</b>
RAOS HOMEMADE	\$11,501,094	\$12,149,343	-5.3	1,352,278	1,432,212	-5.6	95.7	15.5	\$8.50	\$8.48
MICHAELS OF BROOKLYN	\$2,400,357	\$2,159,680	11.1	296,477	274,725	7.9	76.3	7	\$8.10	\$7.86
CARBONE	\$2,360,306	\$2,142,738	10.2	262,172	241,549	8.5	79.9	7.2	\$9.00	\$8.87
MUIR GLEN	\$1,051,429	\$976,141	7.7	256,919	256,503	0.2	43.8	4.5	\$4.09	\$3.81
CLASSICO	\$973,863	\$1,044,958	-6.8	203,846	224,678	-9.3	59.3	8.2	\$4.78	\$4.65
PREGO	\$813,860	\$836,309	-2.7	207,192	206,292	0.4	54.2	8.8	\$3.93	\$4.05
FIELD DAY	\$747,843	\$647,091	15.6	204,465	176,701	15.7	26.6	5	\$3.66	\$3.66
RAGU	\$702,048	\$729,611	-3.8	187,410	193,782	-3.3	53.4	7.6	\$3.75	\$3.77
RAOS HOMEMADE	\$637,017	\$614,157	3.7	109,406	102,939	6.3	72.8	2.2	\$5.82	\$5.97
PRIVATE LABEL	\$635,536	\$675,729	-5.9	107,296	120,563	-11	42.9	4.3	\$5.92	\$5.60

- Northeast Natural Channels, is showing -2.1% decline in dollar growth over prior year and is also in decline in unit sales, -2.6%.
- Raos Homemade, the largest \$ volume brand, garners 37% of the subcategory \$ sales but is experiencing decline in both dollars and units, -5.3% and -5.6%, respectively.
- Michaels of Brooklyn, the 2nd largest brand in \$ volume, is experiencing solid dollar growth in the subcategory +11.1% in dollars and +7.9% in units.
- Field Day brand, the 7<sup>th</sup> ranked brand in dollar volume, is experiencing the highest growth in both dollar and unit volume, +15.6% and +26.6%, respectively.

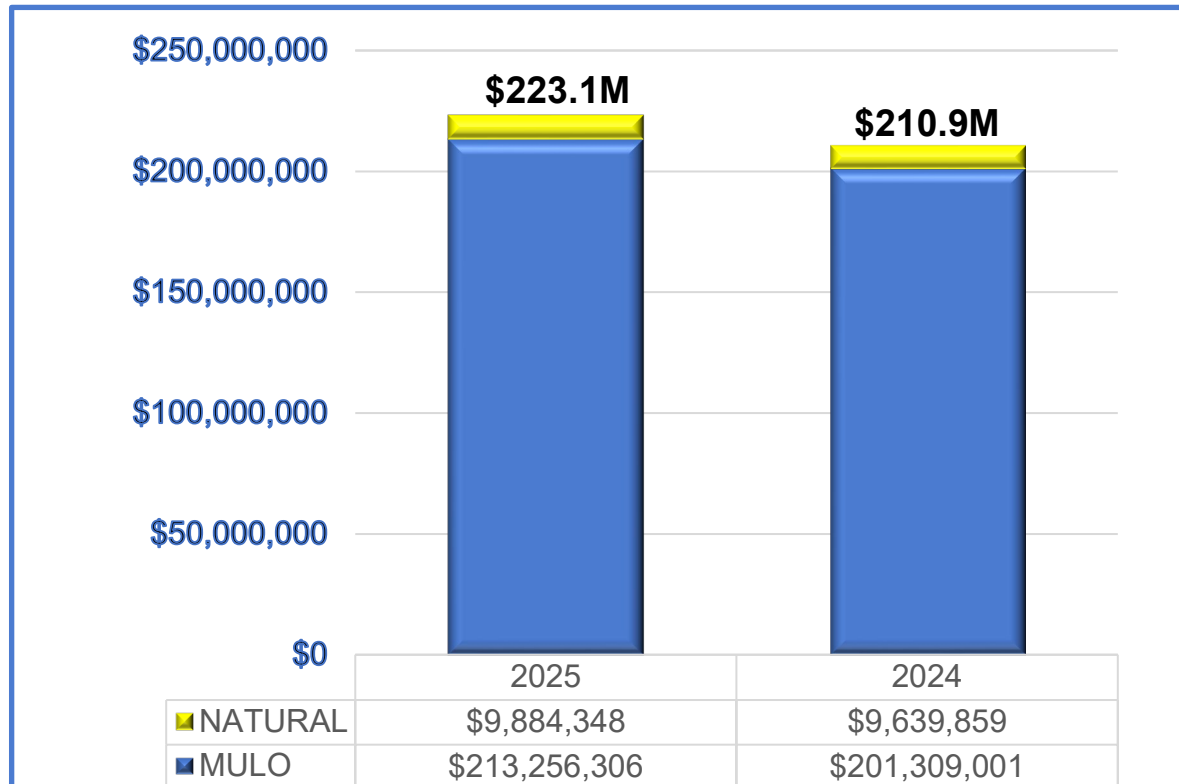
# SS Pizza Sauce

## Sub-category Performance

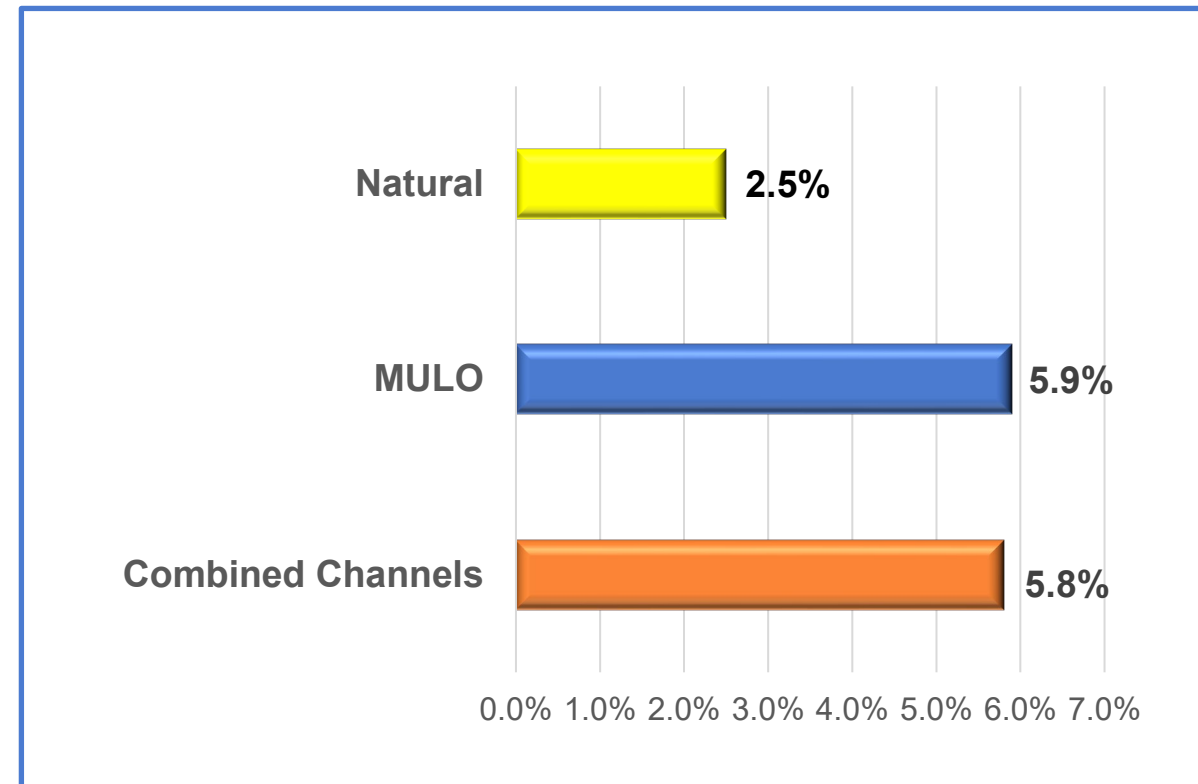
*SPINS Satori - 52 Weeks Ending June 15, 2025*

# Total US SS Pizza Sauce Subcategory

Total US Dollars



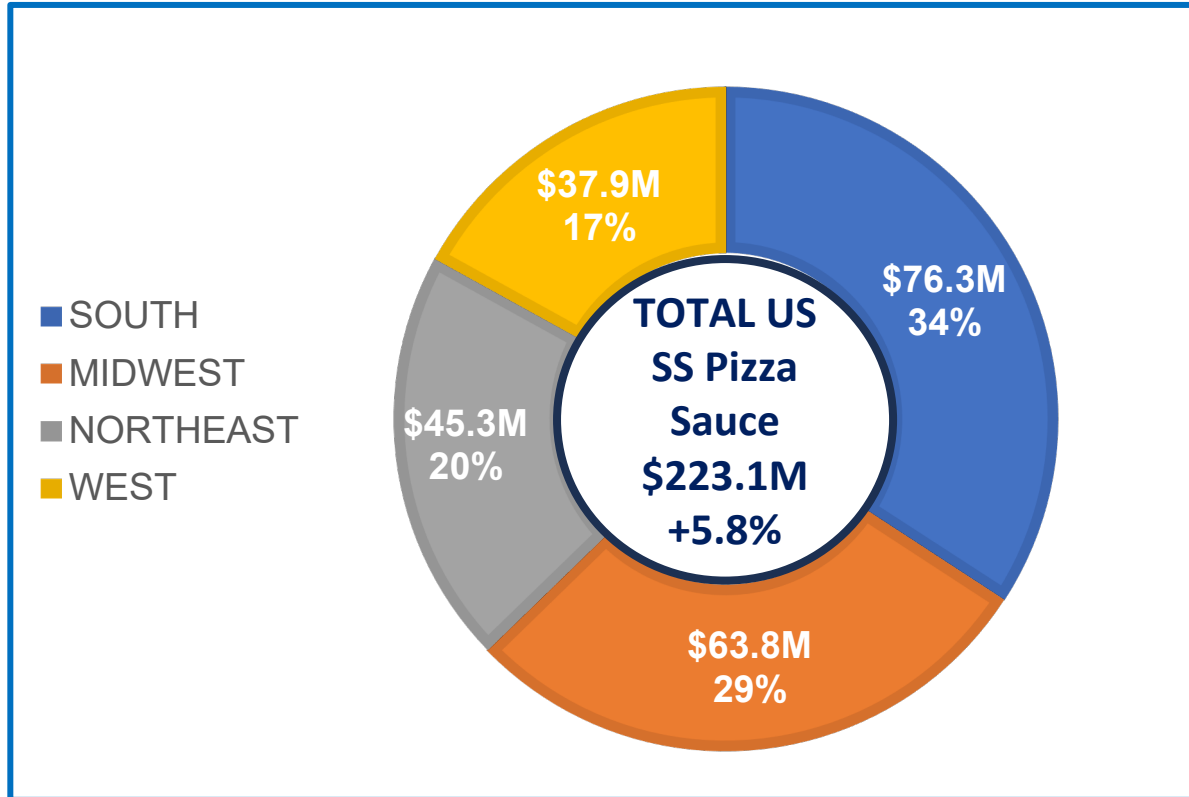
% Dollar Change vs Year Ago



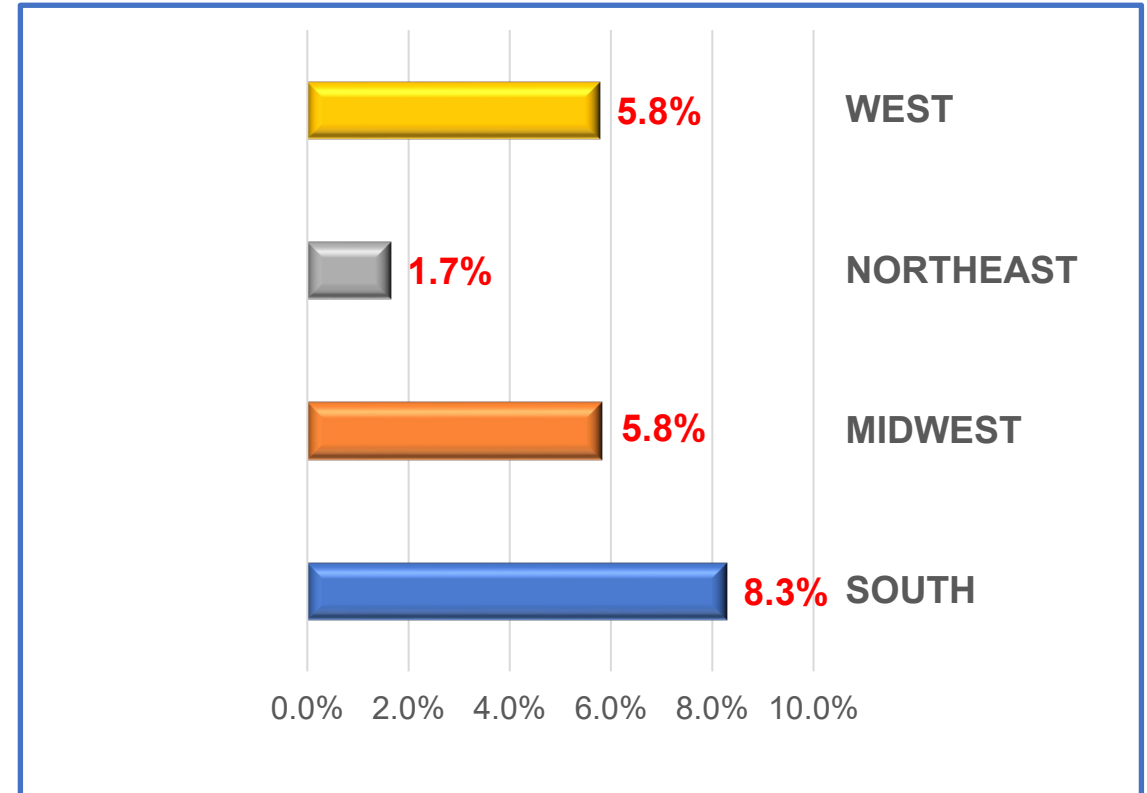
- Total US SS Pizza Sauce is a \$223.1M subcategory and is experiencing positive dollar growth to prior year on a standalone channel and combined basis.
- Sales dollars are showing growth in the Natural Channel, +2.5%, MULO, +5.9%, and combined channels, growing +5.8%.

# Total US - SS Pizza Sauce - By Region

Total Dollars and % Category Share by Region



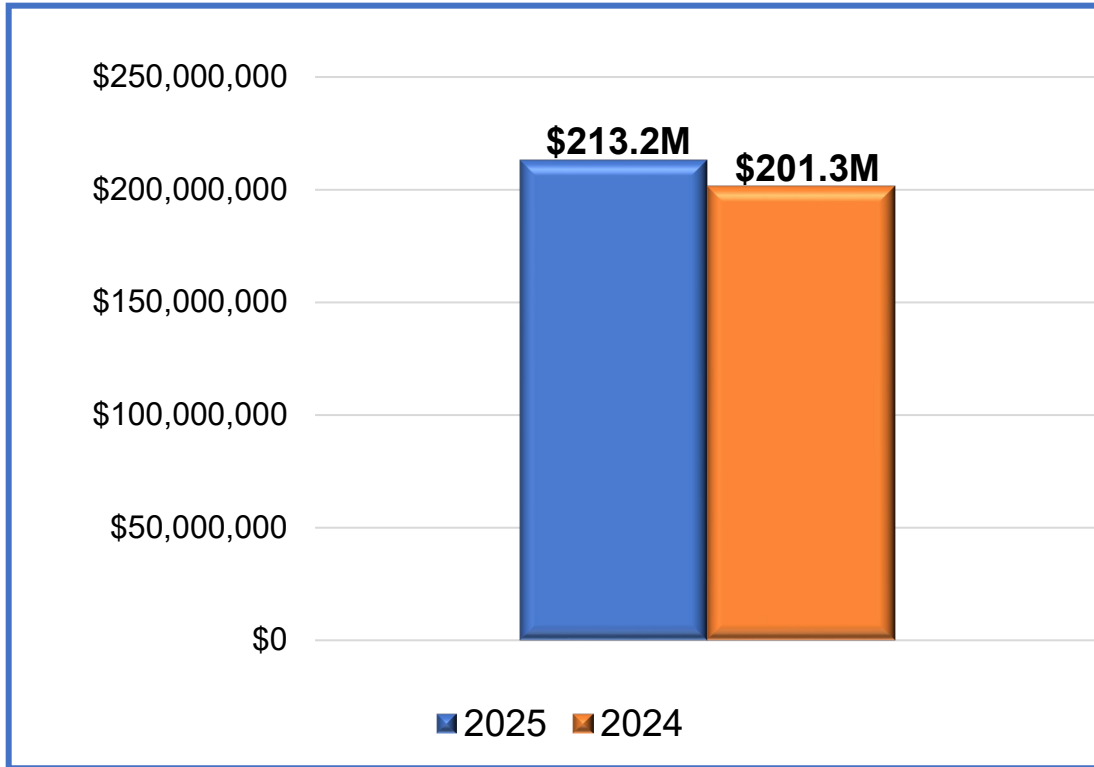
% Dollar Change vs Year Ago



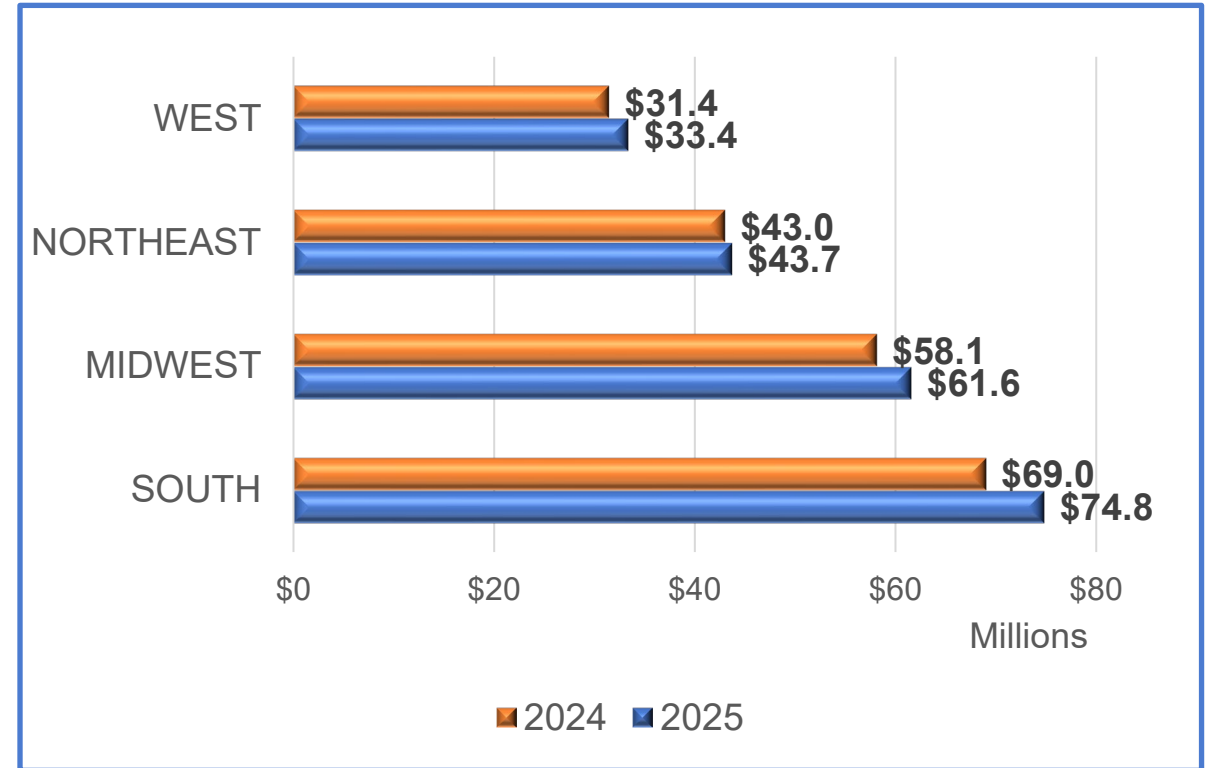
- The South is the most highly developed region for this sub-category, responsible for 34% of dollar volume with growth of +8.3%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining dollar volume with respective growth of +5.8%, +1.7% and +5.8%.

# Total US MULO: SS Pizza Sauce Subcategory

MULO Total US Dollars



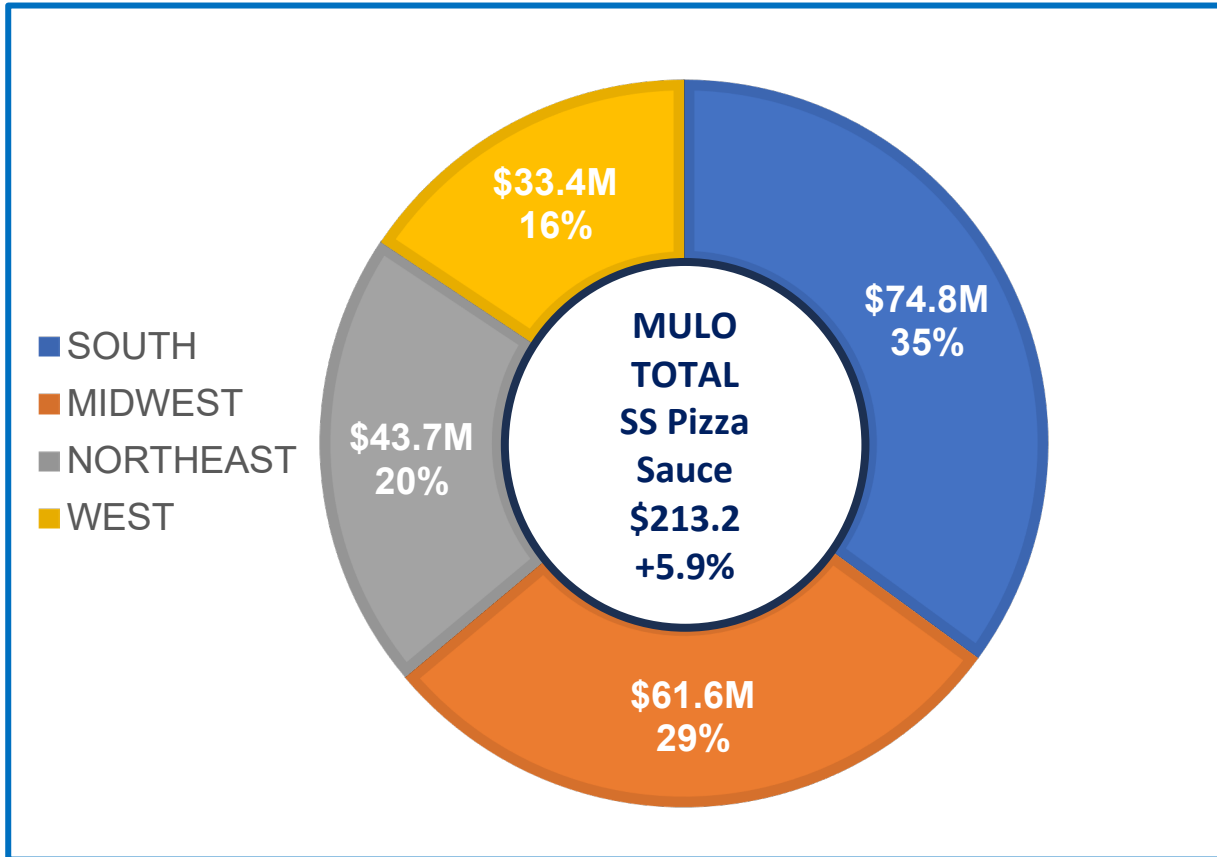
Dollar Change vs Year Ago



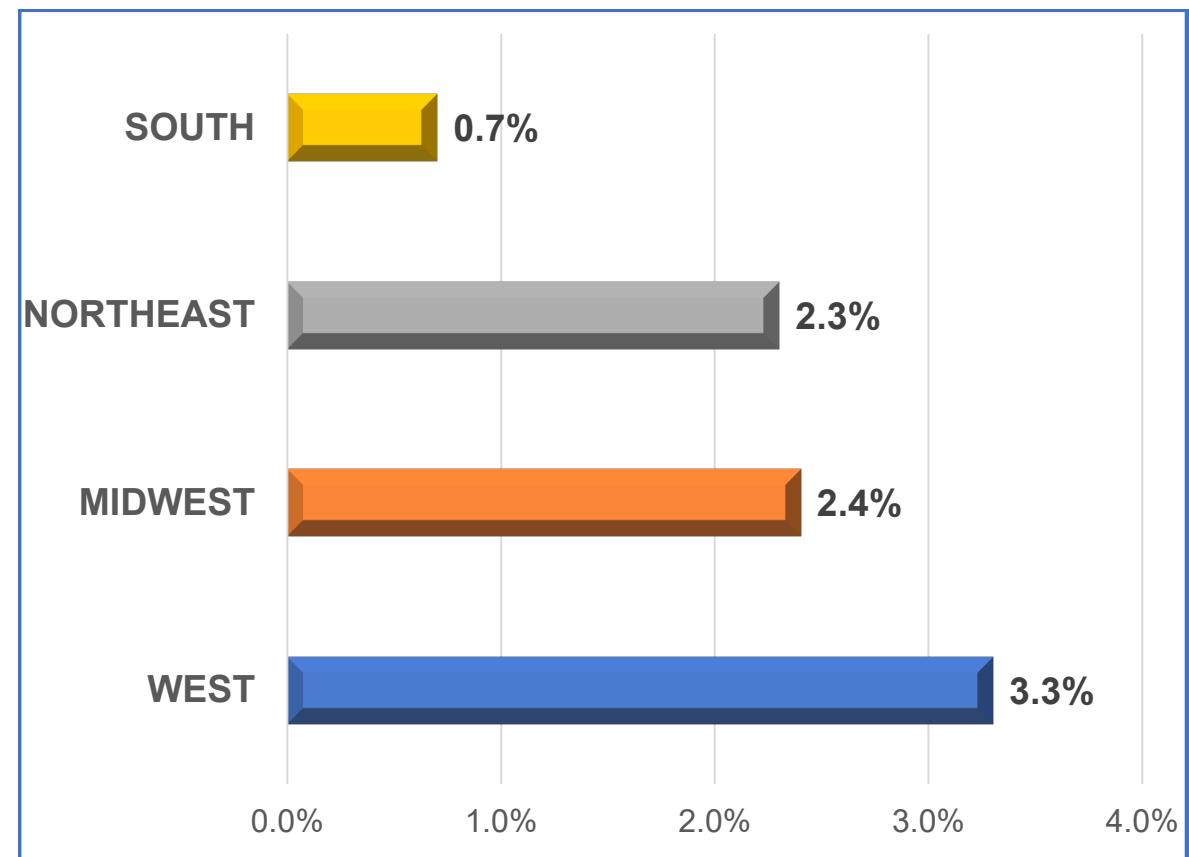
- Total US MULO dollar volume SS Pizza Sauce is \$213.2M and is growing in dollar volume to prior year by +5.9%.
- The South is the largest dollar volume region, followed by Midwest, Northeast, and West, respectively.
- All 4 census regions and Total US are posting greater dollar sales to prior year.

# MULO: SS Pizza Sauce Subcategory

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South is the most highly developed region for this subcategory, responsible for 35% of total dollar sales, with dollar volume growth of +0.7%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 65%; all are showing dollar growth to prior year.

# MULO: SS Pizza Sauce

## Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars %		Units %		Average		ARP, Yago	
			Chg, Yago	Units	Units, Yago	Chg, Yago	Avg % ACV	Items Selling		
<b>SS PIZZA SAUCE</b>	<b>\$43,695,596</b>	<b>\$42,995,739</b>	<b>1.6</b>	<b>16,623,915</b>	<b>16,566,395</b>	<b>0.3</b>			<b>\$2.63</b>	<b>\$2.60</b>
RAOS HOMEMADE	\$9,791,588	\$8,800,695	11.3	1,840,193	1,674,589	9.9	69.8	2.2	\$5.32	\$5.26
PRIVATE LABEL	\$9,318,809	\$8,144,012	14.4	5,260,783	4,475,752	17.5	80.8	1.9	\$1.77	\$1.82
DON PEPINO	\$3,799,098	\$4,001,430	-5.1	1,514,826	1,630,355	-7.1	55	1	\$2.51	\$2.45
PREGO	\$2,909,513	\$3,185,805	-8.7	1,081,043	1,214,512	-11.0	57.6	1.3	\$2.69	\$2.62
CLASSICO	\$2,756,471	\$2,941,145	-6.3	892,793	1,043,850	-14.5	42	1.1	\$3.09	\$2.82
DEL GROSSO	\$2,678,981	\$2,829,754	-5.3	1,496,747	1,662,144	-10.0	15.4	2.1	\$1.79	\$1.70
RAGU	\$2,145,126	\$2,216,842	-3.2	1,094,650	1,130,276	-3.2	41.3	1	\$1.96	\$1.96
CONTADINA	\$1,275,258	\$1,362,133	-6.4	608,742	692,667	-12.1	32.3	1.1	\$2.09	\$1.97
DELALLO	\$1,236,181	\$1,126,128	9.8	366,501	336,835	8.8	26.9	1.4	\$3.37	\$3.34
CASA VISCO	\$655,275	\$828,278	-20.9	147,294	191,647	-23.1	12.1	1.3	\$4.45	\$4.32

- SS Pizza Sauce in Northeast MULO is growing +1.6% in dollar volume over prior year and is also growing in unit volume, at +0.3%.
- Raos Homemade is the leading brand within this subcategory in the Northeast, with \$9.8M in dollar volume, growing 11.3%, and growing in unit volume at +9.9%.
- Private Label, ranking 2<sup>nd</sup> in this subcategory in overall dollar volume, is registering +14.4% growth, the highest in the subcategory and is showing a +17.5% increase in unit volume, year over year; is also the highest of all Top 10 brands.

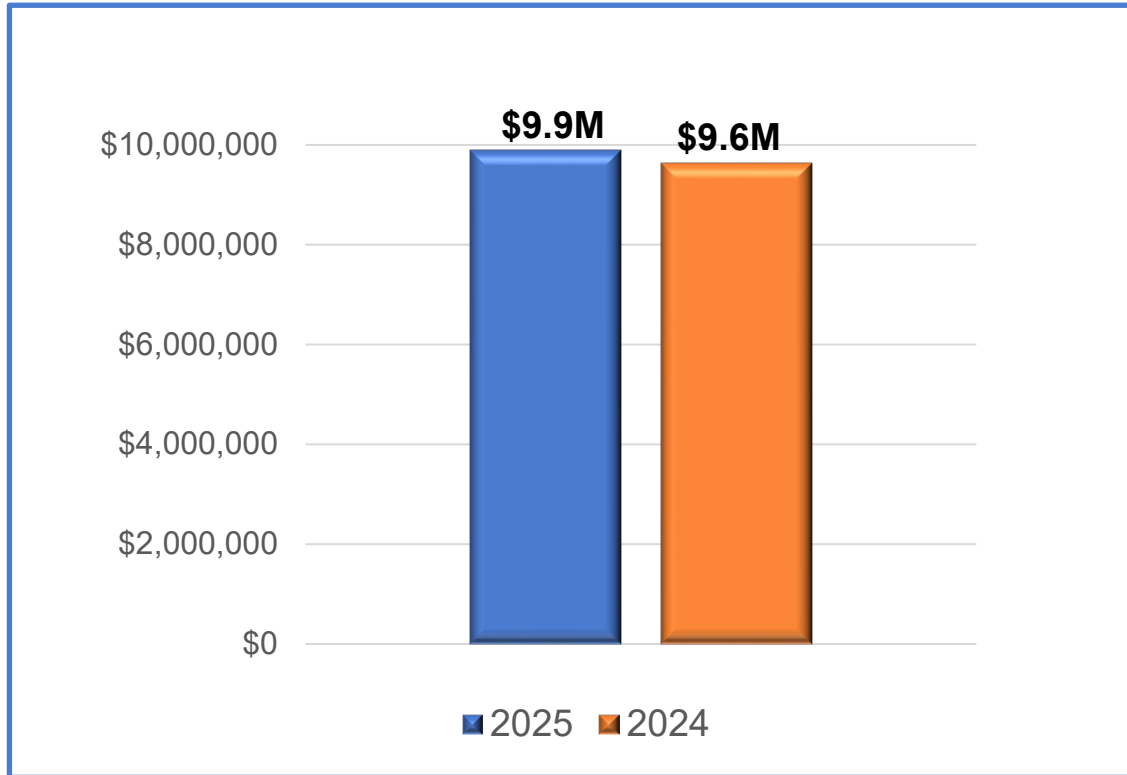
## MULO: SS Pizza Sauce Top Markets Northeast Census Region

Geography	Dollars	Dollars %		Units	Units %		TDP	TDP, Yago	ARP	ARP, Yago
		Dollars, Yago	Chg, Yago		Units, Yago	Chg, Yago				
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$6,759,307	\$6,599,719	2.4	2,220,403	2,213,592	0.3	\$1,037.60	\$1,047.60	\$3.04	\$2.98
NEW YORK, NY - MULO	\$6,182,299	\$6,154,320	0.5	1,920,060	1,874,958	2.4	\$737.80	\$727.70	\$3.22	\$3.28
NEW ENGLAND - MULO	\$6,134,748	\$5,893,425	4.1	2,200,023	2,207,264	-0.3	\$1,351.20	\$1,476.80	\$2.79	\$2.67
BOSTON, MA - MULO	\$4,907,806	\$4,873,444	0.7	1,651,551	1,686,216	-2.1	\$1,055.20	\$1,136.70	\$2.97	\$2.89
PHILADELPHIA, PA - MULO	\$4,535,175	\$4,522,053	0.3	1,629,369	1,598,226	1.9	\$1,021.70	\$1,024.50	\$2.78	\$2.83
HARRISBURG/SCRANTON, PA - MULO	\$4,133,304	\$4,048,384	2.1	1,858,547	1,818,429	2.2	\$1,167.70	\$1,249.90	\$2.22	\$2.23
BUFFALO/ROCHESTER, NY - MULO	\$3,281,210	\$3,337,823	-1.7	1,399,616	1,421,167	-1.5	\$1,041.90	\$1,092.20	\$2.34	\$2.35
PITTSBURGH, PA - MULO	\$2,949,447	\$2,891,497	2.0	1,332,642	1,349,803	-1.3	\$1,065.20	\$1,163.60	\$2.21	\$2.14
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$2,160,736	\$2,075,863	4.1	743,337	710,026	4.7	\$914.00	\$962.00	\$2.91	\$2.92
SYRACUSE, NY - MULO	\$1,533,674	\$1,550,790	-1.1	642,007	658,787	-2.5	\$1,028.30	\$1,127.40	\$2.39	\$2.35
ALBANY, NY - MULO	\$1,495,358	\$1,436,664	4.1	533,778	540,699	-1.3	\$1,388.20	\$1,423.30	\$2.80	\$2.66
PROVIDENCE, RI - MULO	\$753,813	\$711,901	5.9	257,079	238,327	7.9	\$912.40	\$1,035.30	\$2.93	\$2.99

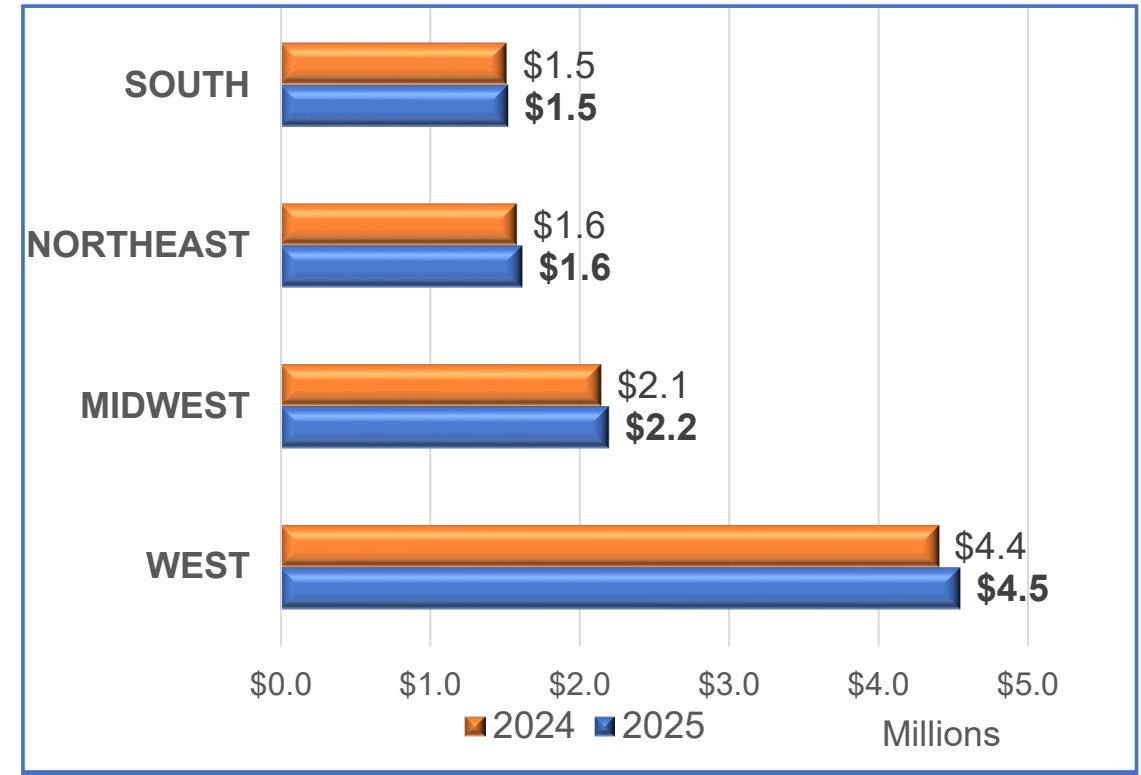
- Baltimore is the largest market for SS Pizza Sauce, posting positive dollar sales growth of +2.4% with an increase in unit growth of +0.3%.
- New England, the 3rd largest market, is responsible for \$6.1M in sales, and is showing dollar growth of +4.1% and a slight unit decline of -0.3%.
- Providence, the 10<sup>th</sup> largest market, is showing the greatest dollar and unit sales increase of all markets in the Northeast.

# Natural Channel: SS Pizza Sauce - Subcategory

Natural Channel Total US Dollars



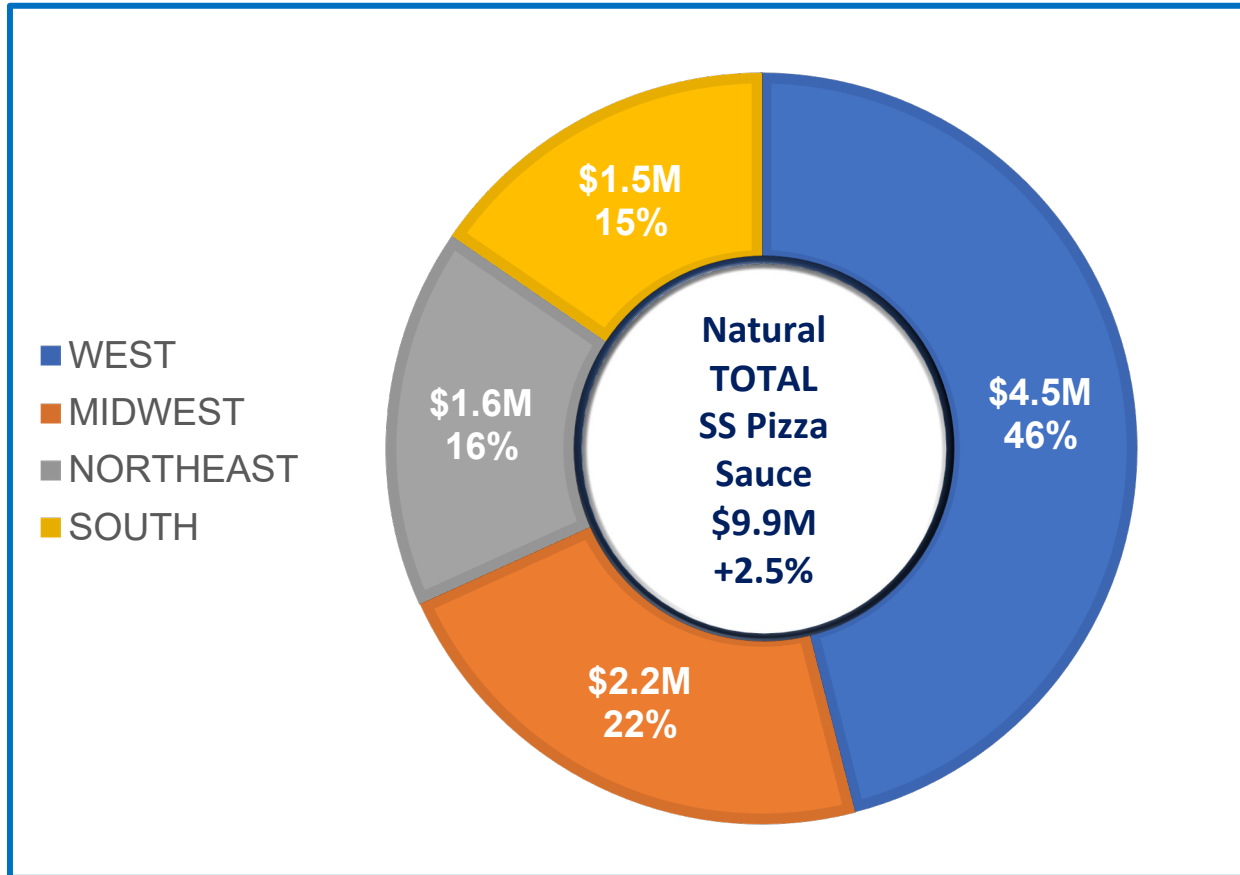
Dollar Change vs Year Ago



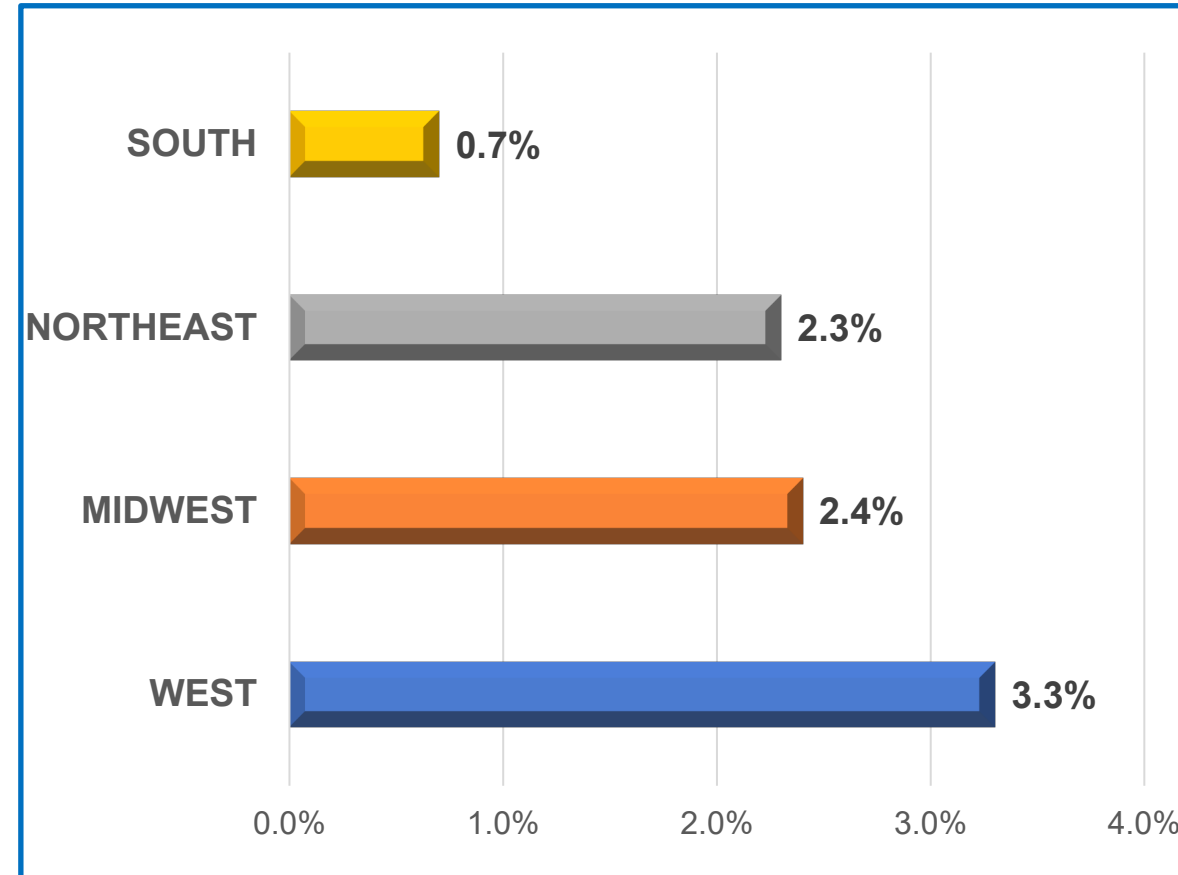
- Total Natural Channel \$ volume for the SS Pizza Sauce subcategory is \$9.9M and is growing +2.5% over prior year.
- The West is the largest \$ volume region, followed by the Midwest, Northeast, and South, respectively.
- All 4 census regions are posting dollar sales that are greater than prior year.

# Natural Channel: SS Pizza Sauce - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West, the most highly developed region for this subcategory, responsible for 46% of \$ volume, is experiencing the highest growth of the 4 census regions to prior year, +3.3%.
- The Midwest region, the 2<sup>nd</sup> largest market, is showing increase in dollars, +2.4%.
- The 2 remaining regions; Northeast is growing to prior year dollars, +2.3%, while the South is experiencing slight dollar growth, +0.7%.

# SS Pasta & Pizza Sauce

## Category & Subcategory Report

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