



ASSESSING THE EVOLUTION AND OPPORTUNITIES OF PASTA AROUND THE WORLD

WORLD PASTA DAY AND CONGRESS 2016, MOSCOW

JACK SKELLY, FOOD ANALYST

INTRODUCTION

MARKET SUMMARY

OPPORTUNITIES IN PASTA

CONCLUSIONS



The World of Pasta: Qualified Optimism for the Future

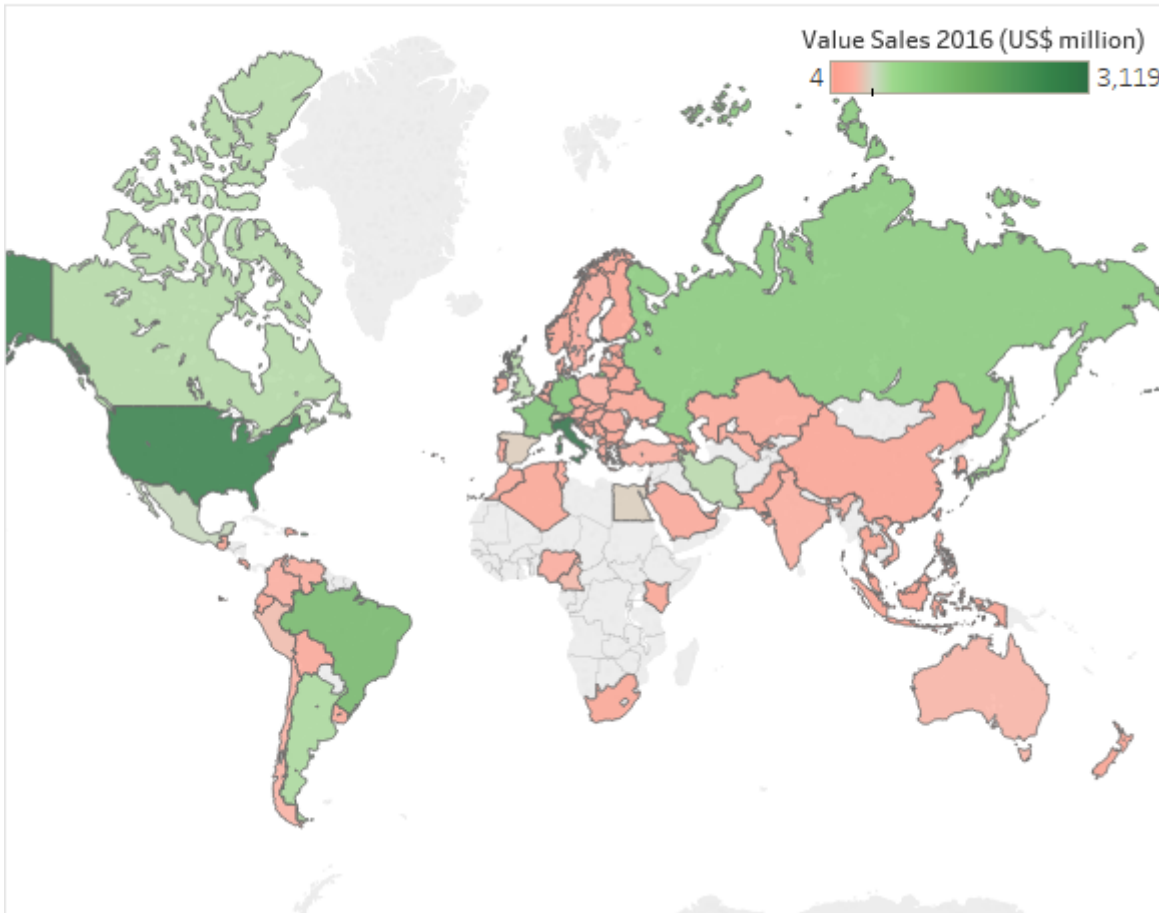
A Global Dish

Numerous growth opportunities worldwide

Room for innovation

Pasta: A Global Food

Global Sales of Pasta, 2016 (US\$ million)



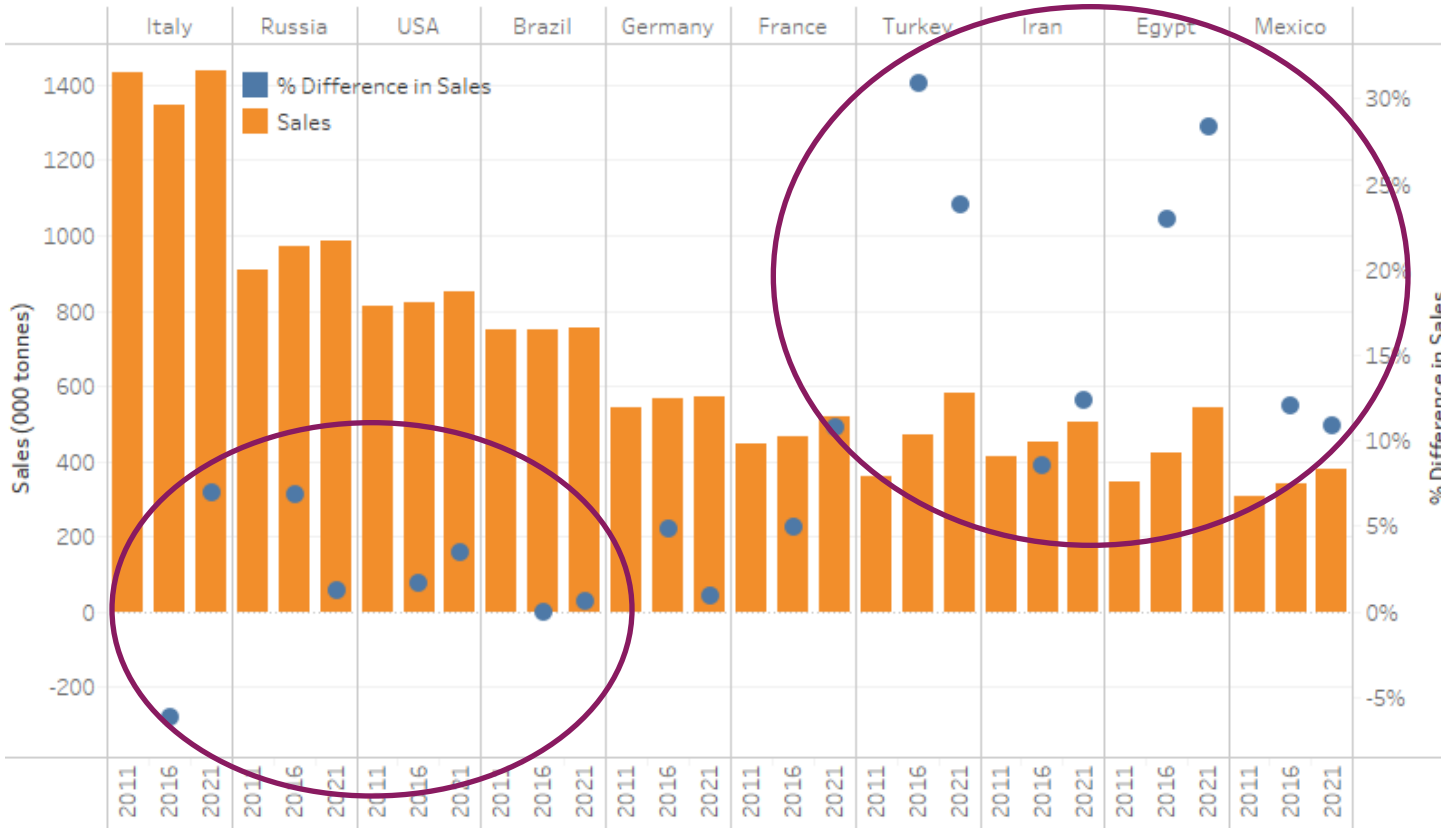
US\$23 billion
SPENT ON PASTA IN 2016

13 million
tonnes
OF PASTA CONSUMED IN
2016

1%
ANNUAL GROWTH, 2011-
2016

Volume sales have performed steadily

Pasta Volume Sales and % Growth, 2011-2021

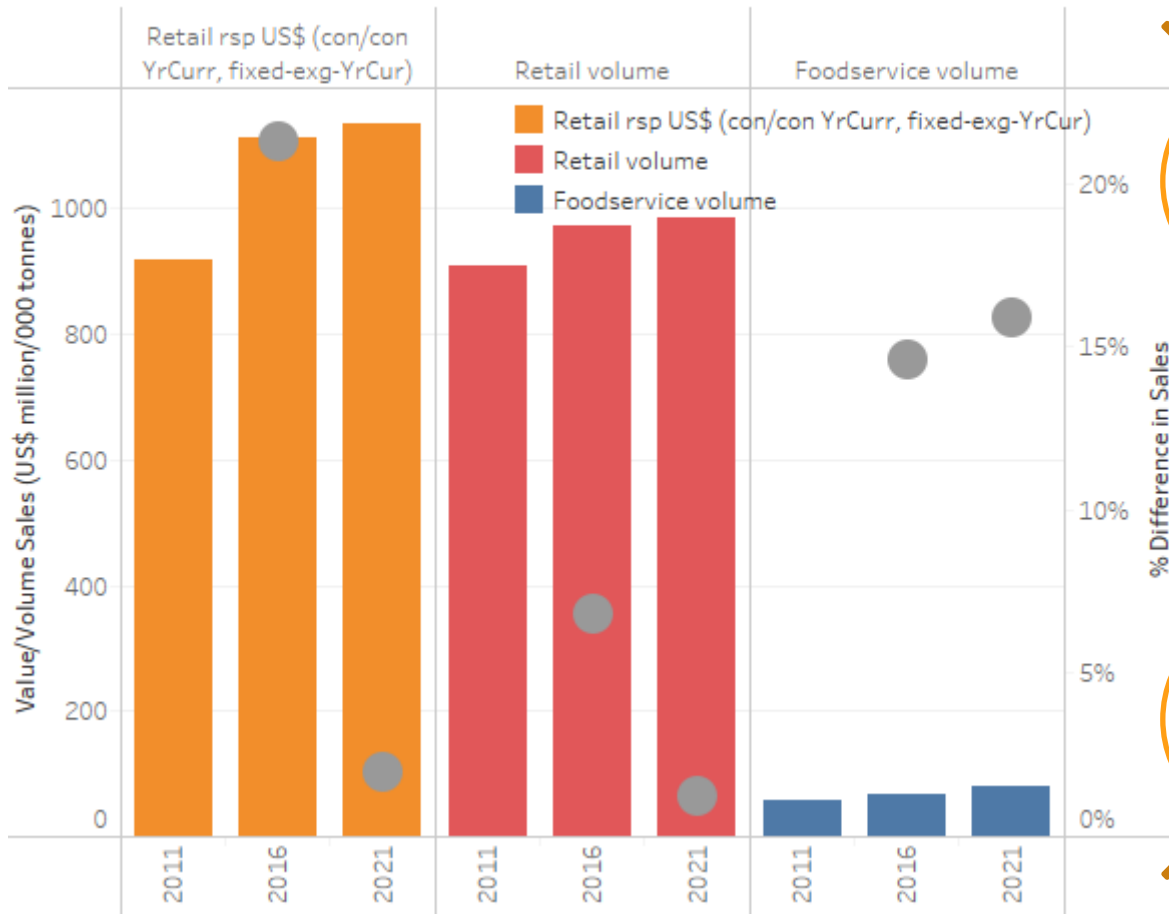


2%

VOLUME AND VALUE ANNUAL GROWTH, 2016-2021

Russia: The Second Largest Pasta Market in the World

Russian Pasta Volume Sales and % Growth, 2011-2021



- Increased consumption of pasta
- Domestic production
- 73% of all staple sales spent on pasta

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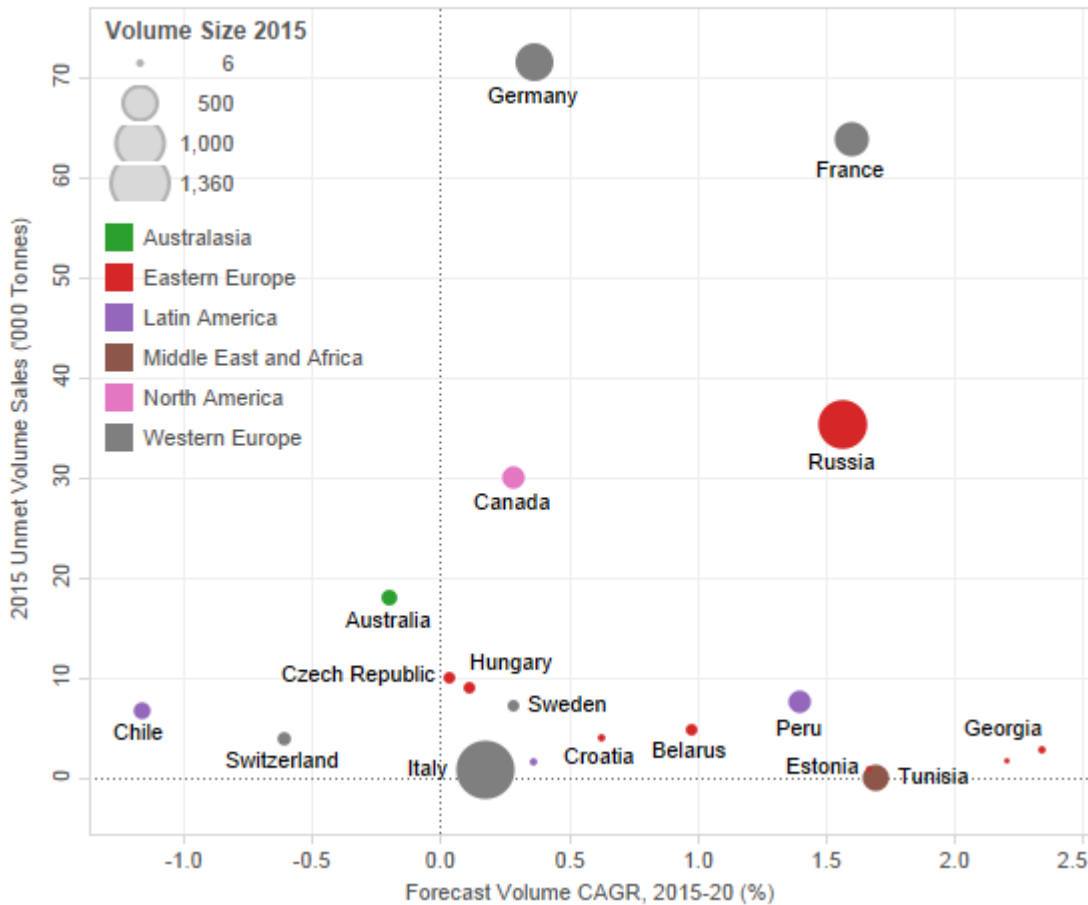
OPPORTUNITIES IN PASTA

CONCLUSIONS



Value growth will be the aim of the game in saturated markets

Saturated Markets - Forecast Performance and Unmet Potential (Volume Sales 2015, '000 Tonnes)



4.7 million
Tonnes

OF PASTA VOLUME SALES

40%

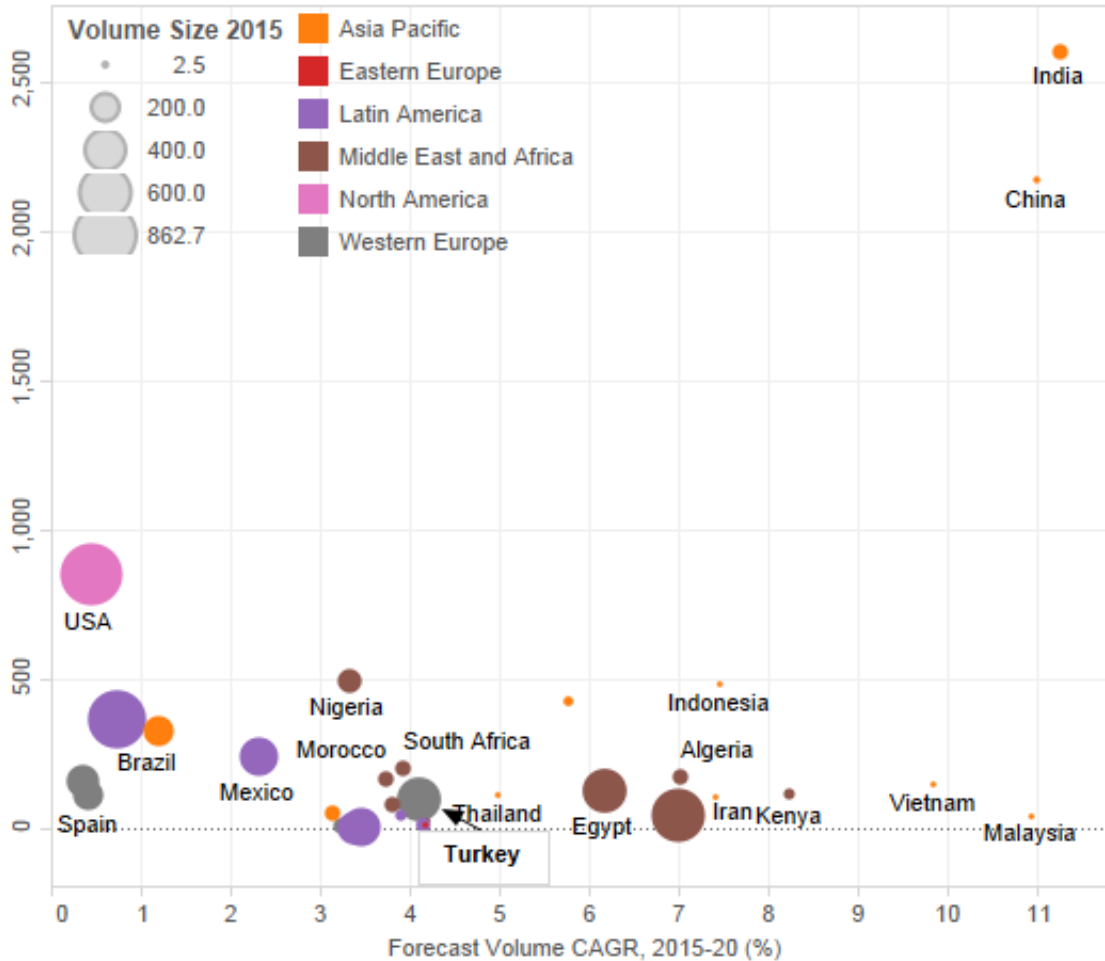
OF GLOBAL PASTA VOLUME SALES

<1%

ANNUAL GROWTH, 2011-2016

But many possibilities exist for pasta worldwide

Unsaturated Markets - Forecast Performance and Unmet Potential
(Volume Sales 2015, '000 Tonnes)



6.9 million
Tonnes
OF PASTA VOLUME SALES

6 million
Tonnes
UNMET MARKET POTENTIAL
(EXCL. CHINA + INDIA)

>2%
ANNUAL GROWTH, 2011-
2016

The polarisation of consumption habits allows growth for pasta

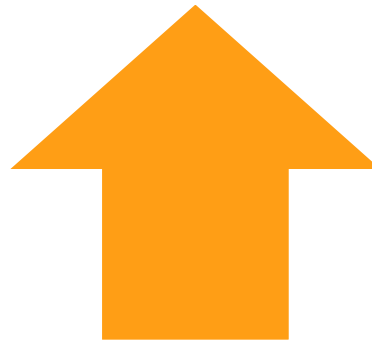
Difficulties

- Decline of set meal times
- Increase in “snacking”
- More adventurous palates



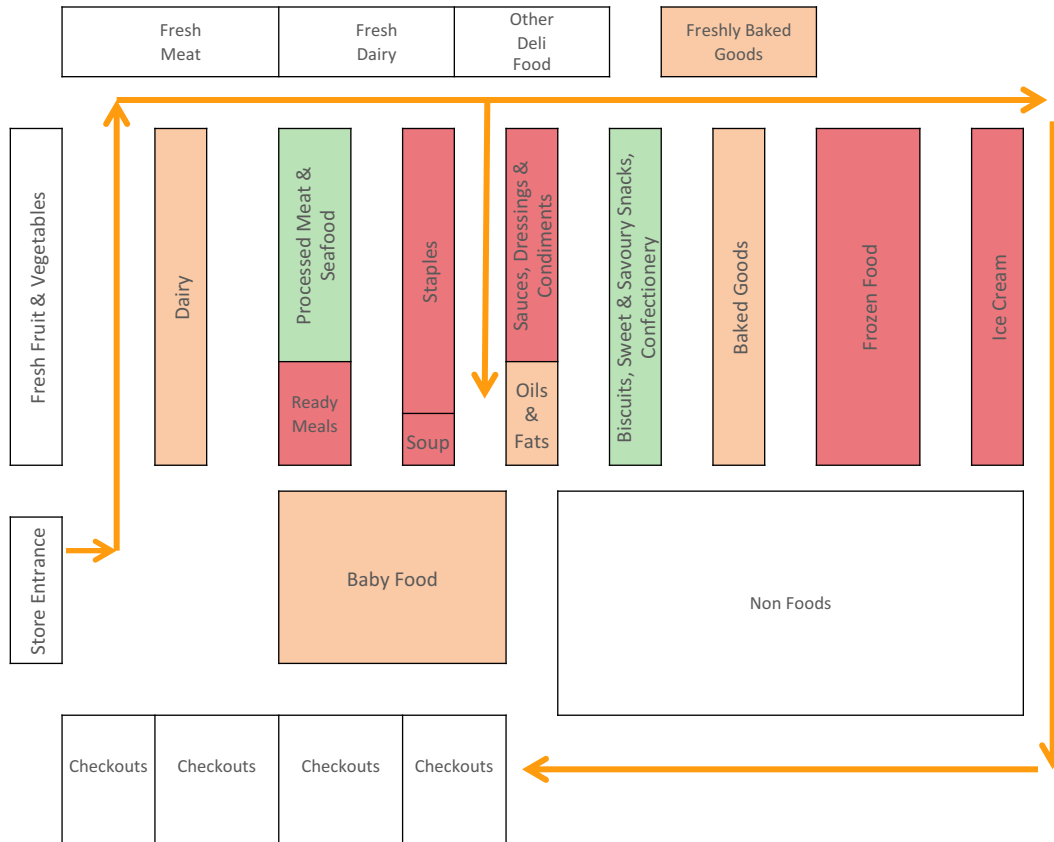
Opportunities

- Popularity of scratch cooking
- Desire for transparency in food purchases
- Perimeter shopping

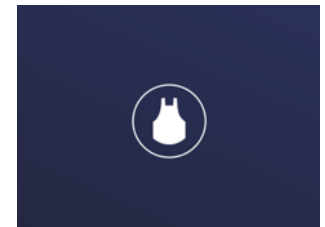


How can Pasta appeal to consumers on health grounds?

The Perimeter Shop

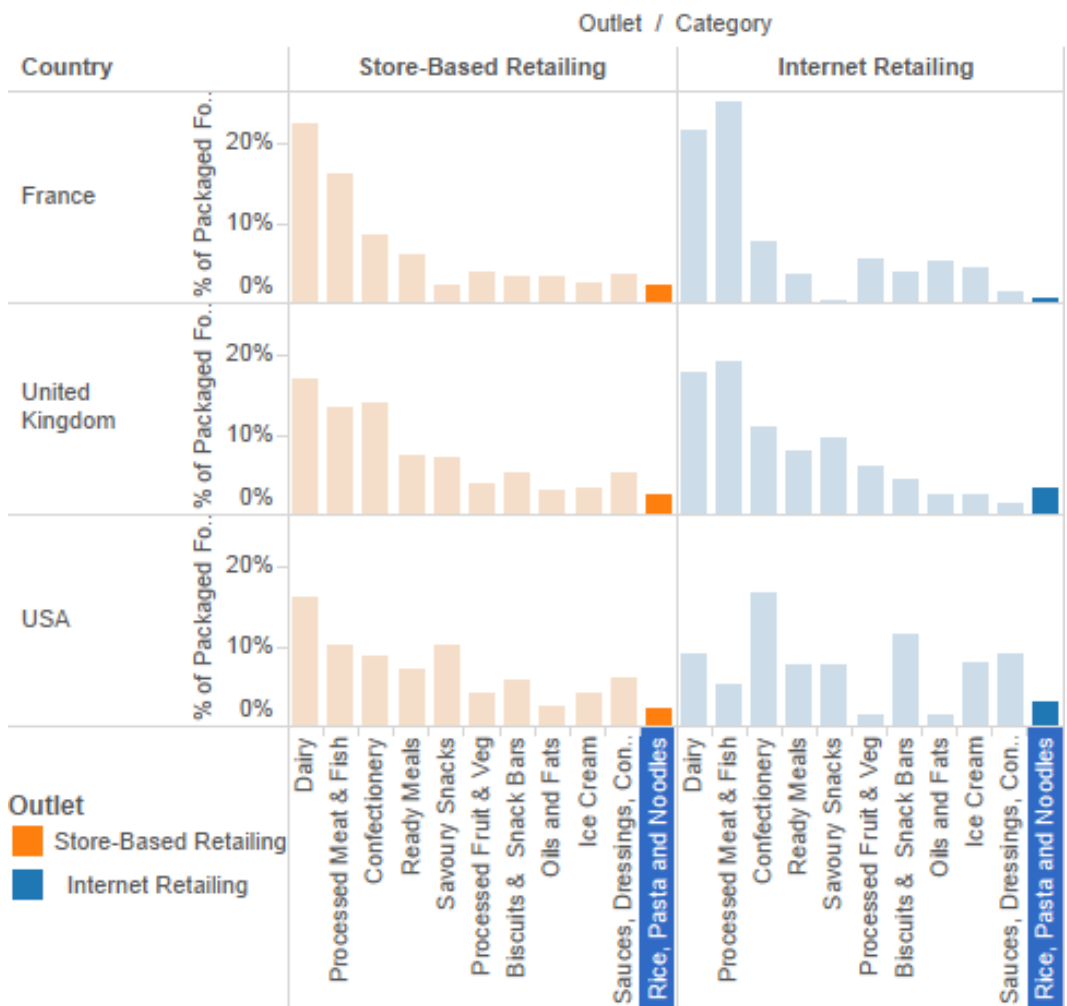


Scratch & Semi-Scratch Cooking



E-commerce: A potential new avenue for growth?

Food Sales by Product by Channel in France, United Kingdom, USA 2015



Google Express

US\$181 billion

Of e-commerce grocery sales by 2019

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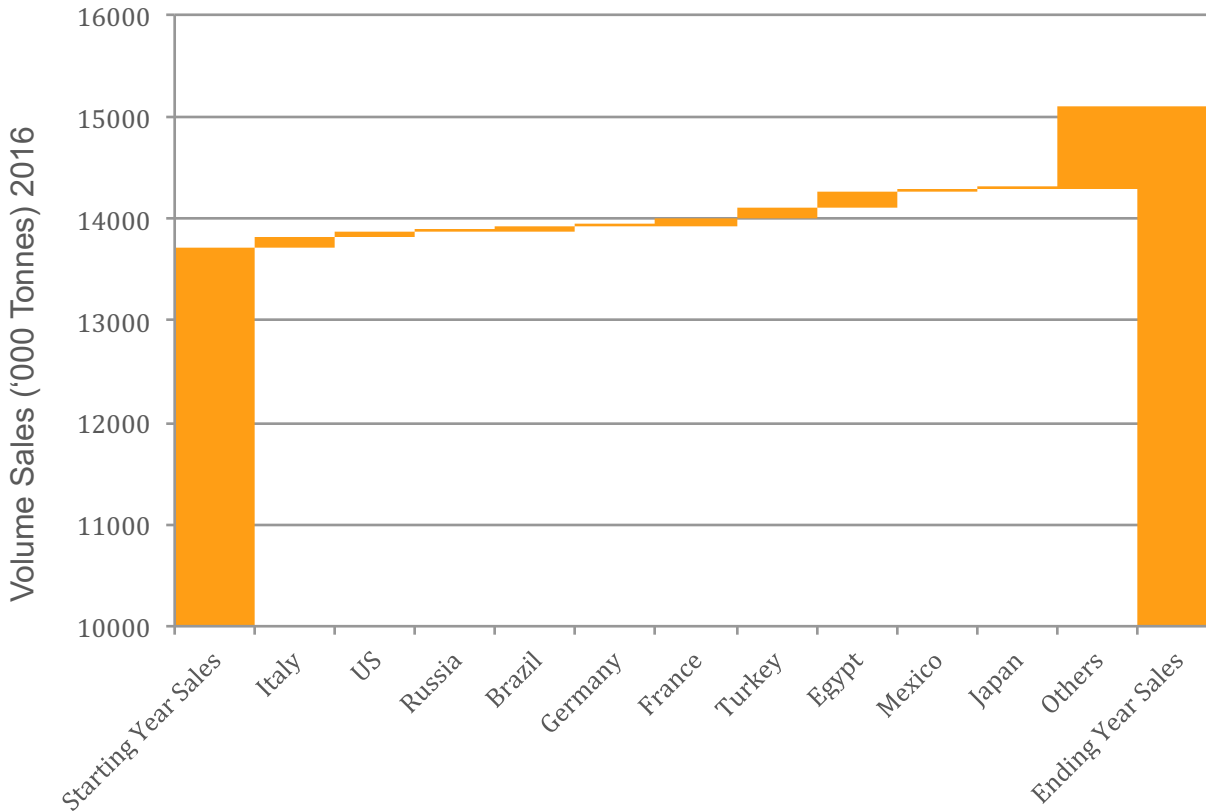
OPPORTUNITIES IN PASTA

OUTLOOK



Volume Forecast: Optimism around the world for Pasta's growth

Forecast Volume Growth: Contributions of Top 10 Pasta Consumers, 2016-2021 ('000 tonnes)



**1.4 million
Tonnes**

OF ADDITIONAL PASTA
VOLUME SALES BETWEEN
2016 AND 2021

52%

OF GLOBAL PASTA VOLUME
SALES WILL COME FROM
MARKETS OUTSIDE TOP 10

2%

ANNUAL GROWTH, 2016-
2021



THANK YOU FOR LISTENING

Jack Skelly

Food Analyst

Jack.skelly@euromonitor.com

Linkedin: [Jack Skelly](#)

View my profile on **LinkedIn**