

Pizza Perfection

Pizza Today- What's Trending?

CUSTOMIZED - Customers are getting more options by being able to build their own pizzas in some fast casual restaurants. Blaze Pizza®, for example, allows patrons to select from a variety of ingredients for a custom creation fitting their tastes and needs (www.blazepizza.com). Blaze Pizza applies “the Chipotle model” to its ordering process, letting customers choose from among seven meats, 15 vegetables, seven cheeses, and six sauces to build their own customized pies, which bake for about two minutes and sell at around \$7 for the total pizza. They aren't charged extra per topping, which is a very competitive concept.

PREMIUM INGREDIENTS- Consumers are seeking more complex flavor profiles including premium ingredients. This includes flatbread, multi-grain and gluten-free crusts; gourmet Italian cheeses; premium meats and lean proteins such as prosciutto ham, pancetta or barbecued chicken; and a greater variety of topping choices within olives, mushrooms, peppers and greens such as kalamata olives, portabello mushrooms, shishito peppers or spinach. Flavorings such as smoked and sweet are getting more play as are a variety of ethnic and cream-based sauces.

AUTHENTIC- Authenticity can be demonstrated through preparation methods and marketing claims like handmade and traditional. Operators can also showcase authenticity by communicating on their menus the way they source their ingredients through descriptions such as homemade sauces, grass fed meats or heirloom vegetables. Operators are looking to sub-regional flavor profiles as well as those outside Italian cuisine like American, Latin and Asian styles.

BETTER FOR YOU- Health-oriented claims, especially “free-from” labels like gluten-free are prominent when it comes to pizza. Better-for-you also extends to freshness, like locally grown, which shows both quality and sourcing. Alternative diets like Vegan are also rising.

Pizza On the Menu

Flatbread drove more than a third of the pizza category growth (35%) with an individual growth rate of 145%. Buffalo chicken comes in second to flatbread, growing 38% (Q3 2011-2014). With the invention of fast-fire infrared ovens, pizzas are now able to be cooked in a few minutes, opening the door to many types of operators including fast casual.

- **Uno Pizzeria and Grill®- Roasted Eggplant Spinach and Feta Flatbread:** Spinach, roasted eggplant, sun-dried and plum tomatoes, caramelized onions, pesto, feta and shredded mozzarella.

Pizza Ingredient Flavors

The prominent flavors to note are smoked (including applewood-smoked), sweet and BBQ. We are also starting to see the emergence of flavors along the lines of herbs and spices like Italian-herb, rosemary, chive, oven-roasted garlic, tarragon, oregano, fennel and jerk. Other growing flavors include peppers like pepperoncini, jalapeno, habanero and Thai chili.

- **Nick 'N Willy's Pizza®- Garlic Chicken Smoked Bacon Pizza:** olive oil glaze, mozzarella, fontina cheese, fresh chopped garlic, smoked chicken, smoked bacon, Roma tomatoes, red onions and oregano



Pizza Ingredient Trends-
Proteins, Sauces, Cheeses & Vegetables!
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PIZZA DISH MENU INCIDENCE % Change 2011-2014		
1	PIZZA- FLATBREAD	145%
2	PIZZA- BUFFALO CHICKEN	38%
3	PIZZA- MEAT	27%
4	PIZZA- SAUSAGE	17%
5	PIZZA- MARGHERITA	16%
6	PIZZA- SUPREME	11%
7	PIZZA- WHITE	10%
8	PIZZA- HAWAIIAN	9%
9	PIZZA- SPINACH	9%
10	PIZZA- BURGER	9%

PIZZA INCIDENCE BY INGREDIENT FLAVOR % Change 2011-2014		
1	APPLEWOOD-SMOKED	139%
2	EVERYTHING	86%
3	SAVORY	35%
4	SMOKED	29%
5	SWEET	29%
6	BBQ	25%
7	SEASONED	13%
8	BUTTER	9%
9	OLIVE OIL	3%
10	MILD	0%



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Pizza Menu Claims

The menu mentions of health claims associated with pizza have more than doubled between Q3 2011-2014. Posting the most growth are claims such as gluten-free and vegan (84% growth collectively). Pizza menu claims are moving more from dietary claims like non-fat toward claims such as light, gluten-free and vegan. Claims such as “free-from” are becoming more popular since safer foods are perceived to be more nutritious.

- **Ledo Pizza® & Pasta- Viva La Vegan Pizza:** flaky crust, LEDO sauce, fresh tomatoes, black olives, red onions, jalapenos, avocado and lemon-infused extra virgin olive oil.

Pizza by Segment and Menu Section

Pizza is on 35.3% of restaurant menus and is most commonly found within casual dining and QSRs. Pizzas are increasing in diversity and application, moving onto appetizer and breakfast menus as well as crossing regional borders and fusing with other types of dishes. It is an exciting time for experimentation, bringing differentiation to this time-tested item.

- **Fong's Pizza(SM)- Thai Chicken Pizza:** peanut sauce, chicken, mirepoix, asiago and mozzarella; garnished with cilantro.

OPERATOR INSIGHTS-KEY TAKEAWAYS

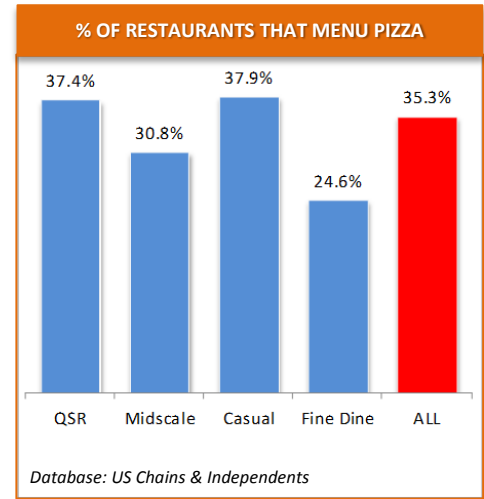
CUSTOMIZED – Consumers enjoy variety, so they are looking for restaurants that provide a good selection of pizza ingredients and the ability to customize. Adding a pizza or pizza-like item, such as flatbreads, calzones or deconstructed pizzas, to the appetizer or shareables menu can help attract consumers. Operators must ensure that there are options for consumers with alternative diets like gluten-free and Vegan.

PREMIUM INGREDIENTS – Consumers desire premium ingredients. Sometimes, a menu dish needs only one ingredient to boost it from typical to upscale. This can be done with crusts, sauces, proteins, cheeses or toppings.

AUTHENTIC – Authenticity is all about perception. Preparation, marketing (especially on the menu) and regional claims can help operators showcase authenticity of products. Sub-regional or niche ingredients are another way to show authenticity which grabs the consumer’s attention because they are often searching for the next big thing.

BETTER FOR YOU – With calorie counts on the menu, there is less room for other information. However, don’t skimp on the menu claims. Use them to indicate freshness, higher quality and health, which increases trust with consumers. Fresh ingredients differ from fresh processes. If a restaurant is unable to source fresh cheese, they can freshly grate it, still attaining the fresh perception.

PIZZA INCIDENCE BY NUTRITIONAL CLAIM % Change 2011-2014		
1	VEGAN	1067%
2	GLUTEN-FREE	141%
3	LIGHT	114%
4	NON-FAT	100%
5	NON-DAIRY	63%
6	LEAN	50%
7	NATURAL	41%
8	HEALTHY	0%
9	VEGETARIAN	0%
10	REDUCED-FAT	0%





Mediterranean Chicken Pizza

Ingredients

- Prepared pizza shells, 6-inch: 6 each
- Angela Mia Fully Prepared Seasoned Pizza Sauce (27000-38952): 4 1/2 cups
- Shredded mozzarella cheese: 12 cups
- Chicken breast, boneless, skinless, cooked, thinly sliced: 9 cups
- Artichokes, drained, rinsed, small dice: 3 cups
- Ripe black olives, sliced, drained: 1 1/2 cups
- Feta cheese, crumbled: 2 1/2 cups
- Basil, chopped: 6 tbsp

Preparation

1. Preheat convection oven to 425°.
2. For one pizza, spread crust with 3 oz. Angela Mia Fully Prepared Seasoned Pizza Sauce.
3. Top with 8 oz. mozzarella cheese, 4 oz. chicken, 2 1/2 oz. artichokes, 2 oz. feta cheese and 1 oz. olives.
4. Bake 11-13 minutes or until cheese is melted and crust is golden brown.
5. Garnish with 1 tablespoon chopped basil.
6. For service: slice pizza into eight slices, 2 slices per serving.

Yields 24 Portions
Portion Size: 2 Slices

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Sources: MINTEL | DATA SSENTIAL | <http://www.qsrmagazine.com/competition/pizza-s-arms-race>

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