Pizza Market in the U.S.: Foodservice and Retail, 2nd Edition

Description:

Pizza remains one of the most popular foods in the U.S. So that presents an ongoing opportunity for foodservice and retail pizza marketers, but also a challenge: how do you gain market share in a saturated market?

Pizza Market in the U.S.: Foodservice and Retail, 2nd Edition, gives industry participants a wealth of insights and information to help them navigate this industry.

Competition for each slice of the pizza market has intensified, so in response, retail pizza marketers and pizza restaurants are ratcheting up the quality bar. Retail pizza marketers seek to keep consumers from migrating to restaurant fare and offer them more options aligning with health and wellness trends. Pizza restaurants seek to address competition from the broader restaurant market, as fast casualization alters the fast food landscape.

The frozen pizza market has been sliding, with a drop in consumption among the product's historical base demographics during 2010-2014. Marketers in the space have responded by improving the nutritional values of frozen pizzas to create a health halo for frozen pizza. And while there are slightly fewer pizza options on menus since 2010, restaurants are countering with flatbread innovation, reimagining and, in some cases, a torrent of limited-time offers to motivate usage and trial.

Pizza Market in the U.S.: Foodservice and Retail, 2nd Edition:

- Places pizza consumption trends within the context of other food trends: via proprietary consumer survey analysis, we place frozen pizza consumption trends within the context of 13 other foods and food types, ranging from fresh fruits and vegetables to processed foods to all-natural proteins. This allows us to assess the interplay between frozen pizza consumption trends (eating more or less of it) within the context of other foods and food types.
- Assesses pizza menu trends and innovation: via proprietary survey analysis, we analyze consumers' usage of pizza restaurants and their menu item ordering decisions; the types of restaurants from which consumers get pizza; and consumer interest in pizza from within the context of 24 other cuisine types, according to whether the restaurant is quick-service or full-service and whether it specializes in pizza. Via trended menu analysis, we assess the prevalence of pizza restaurants by restaurant type (i.e. quick-service, family, casual, fine dining), as well as menu penetration of top pizza proteins, vegetables and sauces by restaurant type; and the degree pizza is featured on kids' menus. We also explore menu themes related to health and convenience.
- Assesses retail pizza choice influencers, trends household pizza and pizza brand use over time, and discusses new product innovation related to foodservice brands at retail and healthy/lifestyle diet pizza.
- Analyses pizza usage channel distribution, identifying consumer usage penetration and preferences among eight pizza procurement sources/types: Restaurant delivery, restaurant pick up; restaurant dine-in; “uncooked” from food retail; pizza made at home from scratch or kit/mix; “uncooked” from restaurant; “ready-to-eat” from food retail; and frozen pizza.
- Presents and discusses frozen pizza sales and product trends among Nestle, Schwan's and General Mills. We include IRI brand sales data analysis and trended consumer brand usage analysis.
- Analyzes six leading pizza restaurant chains: California Pizza Kitchen, Domino's Pizza, Little Caesars Pizza, Papa John's and Pizza Hut. Analysis includes menu, promotion, technology, guest traffic, and other demographic trends; and selected sales information. We also assess consumer rankings of pizza & restaurant attributes.
- Sizes and segments the market, providing an all-channel market size and forecast for retail pizza sales, with 2014 sales segmented by nine distribution channels; and a market size and forecast for pizza restaurants, segmented by type.

Contents:

Chapter 1: Executive Summary
Report Scope
Chapter 2: Market Size and Segmentation

Market size and forecast summary

Pizza sales at retail

Table 2-1: All-Channel Retail Frozen & Refrigerated Pizza Market Size, 2013-2017

Grocery channel dominates

Graph 2-1: All-Channel Retail Frozen Pizza Market Size, by Distribution Channel, 2014

IRI-based multi-channel retail market segmentation

Table 2-2: Retail Pizza Sales and Share, by Segment, 2013-2014

Private label rolls forward

Table 2-3: Retail Pizza Sales and Share, by Segment: Total Sales, Private Label Sales & Sales Share, 2013-2014

Frozen pizza sales

Top marketers: sales highly concentrated among three players

Graph 2-2: Top 15 Frozen Pizza Marketers, 2014

Nestlé sales decline affects market; smaller brands perform well

Table 2-4: Top 15 Frozen Pizza Marketers, 2013-2014

Top brands a mixed bag: Nestlé brands pressured; Schwan bats 2 for 3; health brands falter

Table 2-5: Top 20 Frozen Pizza Brands, 2013-2014

Top growth brands: restaurant associations and health positioning abound

Table 2-6: Top 30 Frozen Pizza Growth Brands, 2013-2014

Refrigerated pizza

Pizza and pizza kits: private label’s domain gains real estate

Table 2-7: Refrigerated Pizza & Pizza Kit Sales: Top Marketers & Brands, 2013-2014

Pizza crust & dough: private label encroachment

Table 2-8: Refrigerated Pizza Crust & Dough Sales: Top Marketers & Brands, 2013-2014

Pizza restaurant sales

Table 2-9: Market Size & Forecast: Full-Service & Limited-Service Restaurants & Pizza Restaurants, 2010-2016

Top 4 chains generate almost 40% of sales; additional room exists for growth

Table 2-10: Top 10 Pizza Restaurant Chains: U.S. Systemwide Sales & Pizza Restaurant Sales Share, 2013
Same-store sales trends
Table 2-11: U.S. Same-Store Sales Trends: Domino's, Papa John's, Papa Murphy's & Pizza Hut, 2009-2014
Graph 2-3: U.S. Cumulative Same-Store Sales Trends: Domino's, Papa John's, Papa Murphy's & Pizza Hut, 2009-2013

Chapter 3: Pizza Usage Channel Distribution
Summary analysis
Pizza usage channel distribution
Introduction
Pizza is most prevalently – and most often – procured via restaurant pick up
Graph 3-1: Pizza Procurement Methods: Used and Used Most, 2014
Pizza procurement methods: cross-usage
Regardless of procurement method chosen, restaurant delivery and pick-up used most often
Table 3-2: Pizza Procurement Methods, by Method Used Most, 2014
Demographic analysis
Women more likely to “make” pizza at home; men utilize foodservice
Table 3-3: Pizza Procurement Methods: Used and Used Most, by Gender, 2014
Young adults most likely to use pizza delivery or RTE retail pizza
Table 3-4: Pizza Procurement Methods: Used and Used Most, by Age, 2014
Less affluent use retail pizza options most often
Table 3-5: Pizza Procurement Methods: Used and Used Most, by HH Income, 2014
Take-and-bake from restaurant and RTE pizza from retail are popular among families
Table 3-6: Pizza Procurement Methods: Used and Used Most: Presence and Age of Children,

Chapter 4: Food Consumption Migration Trends: Placing Pizza in Context
Summary analysis
Pizza in context
Introduction
Trend toward healthier options and away from frozen pizza
Message to the frozen pizza industry
Graph 4-1: Change in Consumer Eating Choices “Over Past Few Years,” 2014
Viewed another way . . .
Frozen pizza consumption trends, by demographic
Graph 4-3: Frozen Pizza Consumption Trends: Changes “Over Past Few Years,” 2014
Net negative across the board
But younger adults remain key consumers
Table 4-1: Frozen Pizza Consumption Trends: “More” and “Less” Response Differential; Indexed Changes “Over Past Few Years,” 2014
Meeting the needs of the female pizza shopper
Trends among the faithful
Graph 4-4: Change in Consumer Eating Choices “Over Past Few Years,” Among Those Eating More Frozen Pizza and Those Eating Less Frozen Pizza, 2014
Trends among those gravitating to all-natural and locally grown
Graph 4-5: Change in Consumer Eating Choices “Over Past Few Years,” Among Those Eating More All-Natural Proteins and More Locally Grown Foods, 2014

Chapter 5: Pizza on the Menu
Summary analysis
Pizza restaurant usage & menu ordering
Usage of restaurant pizza specialists vs. non-pizza specialists
Interest in pizza within context of other cuisines
What’s on the menu
Pizza on the kids’ menu
The dichotomy of pizza
Pizza restaurant usage & menu ordering
Introduction
Pizza restaurant usage is strong
Most pizza restaurant goers order pizza; other menu items are supplementary
Graph 5-1: Pizza Restaurant Users & What They Order, 2014
Demographic analysis
Men more likely to choose other main dishes
Table 5-1: Pizza Restaurant Users & What They Order, by Demographic, 2014
Menu diversity important in catering to interest of 25-34 age group

Table 5-2: Pizza Restaurant Users & What They Order, by Age, 2014
Asians are an untapped opportunity

Table 5-3: Pizza Restaurant Users & What They Order, by Race/Ethnicity, 2014
Family pizza nights are really just about the pizza

Table 5-4: Pizza Restaurant Users & What They Order, by Presence & Age of Children in Household and Children in
Usage of restaurant pizza specialists vs. non-pizza specialists

Introduction
Pizza specialists are the go-to choice when ordering pizza

Graph 5-2: Consumer Usage of Quick-Service & Full-Service Restaurant Pizza Specialists vs. Non-Pizza Specialists, 2014

Demographic analysis
Table 5-5: Consumer Usage of Quick-Service & Full-Service Restaurant Pizza Specialists vs. Non-Pizza Specialists, By Demographic, 2014
Older age groups show preference for full-service pizza specialty restaurants
Table 5-6: Consumer Usage of Quick-Service & Full-Service Restaurant Pizza Specialists vs. Non-Pizza Specialists, By Demographic, 2014
Less affluent skew towards QSR
Table 5-7: Consumer Usage of Quick-Service & Full-Service Restaurant Pizza Specialists vs. Non-Pizza Specialists, By Demographic, 2014
Asians and Hispanics visit quick-service non-pizza specialists
Table 5-8: Consumer Usage of Quick-Service & Full-Service Restaurant Pizza Specialists vs. Non-Pizza Specialists, By Demographic, 2014
Interest in pizza within context of other cuisines

Introduction
Pizza near the top of 25 cuisines
The pizza specialists
Mainstream chains can have their share of the pizza pie too

Table 5-9: Consumer Interest in Specific Cuisines: Quick-Service Restaurants and Full-Service Restaurants that Specialize in Cuisine vs. Mainstream Chains, 2014
What's on the menu

Breadth of use
Table 5-10: Pizza on the Menu, by Restaurant Segment, 2010-2014
Pizza toppings
Pepperoni and sausage are top proteins
Table 5-11: Top Pizza Proteins, by Restaurant Segment, 2010-2014
Long list of veggies and other toppings represented on menus
Table 5-12: Top Pizza Veggies and Other Toppings, by Restaurant Segment, 2010-2014
Operators are utilizing more unique cheeses for pizza
Table 5-13: Top Pizza Cheeses, by Restaurant Segment, 2010-2014
Pizza sauce flavors create point of differentiation
Table 5-14: Top Pizza Sauces, by Restaurant Segment, 2010-2014

Pizza on the kids’ menu
Table 5-15: Pizza on the Menu: All Menus vs. Kids Menu, by Restaurant Segment, 2010-2014
Table 5-16: The Kids Menu: Top Pizza Varieties, Proteins & Ingredients, by Restaurant Segment, 2010-2014

Don't underestimate the value of kids’ menu
For families, entertainment can be just as important as the pizza
The dichotomy of pizza
Health vs. Indulgence
Convenience vs. Experience

Chapter 6: Pizza at Retail
Summary analysis
Frozen pizza choice influencers
Household pizza and pizza brand use over time
Retail new product innovation
Frozen pizza choice influencers

Introduction
Taste is paramount

Graph 6-1: Frozen Pizza Choice Influencers, 2014

Demographic analysis
Older consumers seek great taste
Table 6-1: Frozen Pizza Choice Influencers, by Age, 2014
Less affluent focus on low price and sale
Table 6-2: Frozen Pizza Choice Influencers, by Income, 2014
Asians seek out all natural and unprocessed ingredients
Table 6-3: Frozen Pizza Choice Influencers, by Race/ethnicity, 2014
Northeasterners look for quality associations
Table 6-4: Frozen Pizza Choice Influencers, by Race/ethnicity, 2014
Frozen pizzas are a family meal
Table 6-5: Frozen Pizza Choice Influencers, by Presence of Children & Age of Children 2014
Household pizza use over time
The good news: Longer-term trends are modestly positive
The bad news: Nearer-term trends suggest usage attrition
Table 6-6: Household Frozen Pizza Usage, Usage Frequency & Usage Frequency Share, 2004-2014
Demographic shifts over time
Table 6-7: Household Frozen Pizza Usage Frequency: Indexed, by Demographic, 2010 vs. 2014
Brand goliaths and store brand trending positive
Table 6-8: Household Usage of Frozen Pizza Brands in Past 30 Days, by Brand, 2010 vs. 2014
Demographic analysis
Table 6-9: Household Usage of Frozen Pizza Brands in Past 30 Days: Top Five Brands, 2014
Table 6-10: Household Usage of Frozen Pizza Brands in Past 30 Days: Second Five Brands, by Demographic, 2014
Table 6-11: Household Usage of Frozen Pizza Brands in Past 30 Days: Third Five Brands, by Demographic, 2014
Table 6-12: Household Usage of Frozen Pizza Store Brands in Past 30 Days, 2010 vs. 2014
Retail new product innovation
Foodservice brands at retail
Healthy pizza
Real food positioning
Lifestyle diets

Chapter 7: Retail Pizza Manufacturer & Brand Analysis
Nestlé USA, Inc.
Sales performance: restaurant quality to the rescue
Table 7-1: Nestlé Frozen Pizza Sales, by Brand and Line Extension, & Frozen Pizza Kits/Toppings Sales, 2013-2014
Top Nestlé brands
Trending the DiGiorno frozen pizza household
Table 7-2: DiGiorno Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
Trending the Jack's frozen pizza household
Table 7-3: Jack's Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
Trending the Tombstone frozen pizza household
Table 7-4: Tombstone Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
Trending the California Pizza Kitchen frozen pizza household
Table 7-5: California Pizza Kitchen Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
Trending the Stouffer's frozen pizza household
Table 7-6: Stouffer's: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
Trending the Lean Cuisine frozen pizza household
Table 7-7: Lean Cuisine: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
The Schwan Food Company
Sales performance: Red Baron steady; Freschetta & Tony's diverge
Table 7-8: Schwan's Frozen Pizza Sales, by Brand and Line Extension, 2013-2014
Top Schwan brands
Trending the Red Baron frozen pizza household
Table 7-9: Red Baron Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
Trending the Tony's frozen pizza household
Table 7-10: Tony's Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
Trending the Freschetta frozen pizza household
Table 7-11: Freschetta Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014
General Mills
Table 7-12: General Mills: Global Sales by Region & U.S. Retail Sales by Division, 2012-2014
Sales performance: Totino's and Annie's in the driver's seat
Table 7-13: General Mills Frozen Pizza Sales, by Brand & Refrigerated Pizza Crust/Dough Sales, 2013-2014
The Totino's frozen pizza household
Table 7-14: Totino's Frozen Pizza: Household Use in Past 30 Days, by Demographic, 2010 vs. 2014

Chapter 8: Restaurant Pizza Chain Analysis
Pizza & restaurant attribute rankings
Graph 8-1: Last Time Pizza Ordered from Restaurant: Pizza & Restaurant Attribute Rankings, 2010-2014
California Pizza Kitchen
Company overview
Brand strategy
Menu innovation
Table 8-1: California Pizza Kitchen: New Menu Items, 2013-2014
Targeting the California Pizza Kitchen Guest
2010-2014 guest traffic trends
Table 8-2: California Pizza Kitchen Users and Engaged Users, by Demographic, 2010 vs. 2014
Guest attitudes about health, diet and food
Table 8-3: California Pizza Kitchen Users: Attitudes about Health, Diet and Food
Domino's Pizza
Company overview
Technology innovation
Menu innovation
Changes over time
Table 8-4: Domino's Pizza: New Menu Items, 2013-2014
Targeting the Domino's Pizza Guest
2010-2014 guest traffic trends
Table 8-5: Domino's Pizza Users and Engaged Users, by Demographic, 2010 vs. 2014
Guest attitudes about health, diet and food
Table 8-6: Domino's Pizza Users: Attitudes about Health, Diet and Food
Little Caesars Pizza
Company overview
Menu innovation
Little Caesars Pizza: New Menu Items, 2013-2014
Targeting the Little Caesars Guest
2010-2014 guest traffic trends
Table 8-8: Little Caesars Users and Engaged Users, by Demographic, 2010 vs. 2014
Guest attitudes about health, diet and food
Table 8-9: Little Caesars Users: Attitudes about Health, Diet and Food
Papa John's
Company overview
Technology innovation
On the menu
Menu innovation
Table 8-10: Papa John's: Selected New Menu Items, 2013-2014
Targeting the Papa John's Guest
2010-2014 guest traffic trends
Table 8-11: Papa John's Users and Engaged Users, by Demographic, 2010 vs. 2014
Guest attitudes about health, diet and food
Table 8-12: Papa John's Users: Attitudes about Health, Diet and Food
Pizza Hut
Company overview
Brand strategy
Overhaul in the works
Menu innovation
Table 8-13: Pizza Hut: New Menu Items, November 2014
Table 8-13: Pizza Hut: New Menu Items, November 2014 [cont'd]
Technology innovation
Targeting the Pizza Hut Guest
2010-2014 guest traffic trends
Table 8-14: Pizza Hut Users and Engaged Users, by Demographic, 2010 vs. 2014
Guest attitudes about health, diet and food
Table 8-15: Pizza Hut Users: Attitudes about Health, Diet and Food

Appendix
Methodology
Consumer survey methodology
Report table interpretation
Color coding
Indexing
Terms and definitions
Supermarkets
Restaurant categories
Limited-service restaurant definitions
Full-service restaurant definitions
Other definitions


Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Pizza Market in the U.S.: Foodservice and Retail, 2nd Edition
Web Address: http://www.researchandmarkets.com/reports/3098818/
Office Code: SC

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format</th>
<th>Single User</th>
<th>Enterprisewide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF)</td>
<td>USD 3995</td>
<td>USD 7990</td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [Mr] [Mrs] [Dr] [Miss] [Ms] [Prof]
First Name: ___________________________ Last Name: ___________________________
Email Address: * ___________________________
Job Title: ___________________________
Organisation: ___________________________
Address: ___________________________
City: ___________________________
Postal / Zip Code: ___________________________
Country: ___________________________
Phone Number: ___________________________
Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by Wire Transfer: Bank details will be provided on the invoice which you will receive after you place your order with us.

If you have a Marketing Code please enter it below:

Marketing Code: __________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World