

Culinary Trends

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Pizza Trends Take Shape

From better-for-you pies to hotter heat sources, pizza continues to evolve. In this report, we'll look at overall pizza trends; top pizza styles, ingredients and menu claims and some culinary tips to leverage the latest trends.

Macro Pizza Menu and Ingredient Trends

1. **Flatbread** – Skip the conventional sauce and cheese to turn a flatbread crust into a salad base, sandwich form and other applications.
2. **Hotter Heat Sources** – New oven technology can deliver made-to-order pies in under five minutes, while coal, wood and brick give crusts a rustic touch.
3. **Health Matters** – With pizza, diet-specific menu claims ("gluten-free," "vegan," "diary-free") are more important than "low" or "free" claims as consumers focus on better health over lower calories.
4. **The Globe on a Pie** – Some unexpected global influences (Thai, Mexican, Jamaican) have staying power in pizza formats; the key is to match the sauce to the cuisine and, in some cases, make cheese a less important element.
5. **Local and Seasonal** – Fresh elements and seasonal ingredient combinations (pear and gorgonzola; spring greens and pancetta) keep pizza fresh, seasonal and tempt diners to try new tastes in a familiar format.



Photo source: Olive Garden

Top Pizza Styles, Menu Claims and Ingredients

Classic styles are on top; veggies and better-for-you options on the rise.

Top Pizza Menu Items

- Traditional cheese tops the list of most menued pizza, and vegetable-topped pies are menued more than any meat varieties.
- Chicken, both plain and Buffalo, as a pizza topping, has also grown, showing that pizza operators, like burger concepts, are looking to this less expensive protein as beef prices climb higher.
- The Margherita pizza, made with fresh garlic, basil leaves, sliced tomato and mozzarella, has seen the greatest growth (+50% since 2009), an indication that more authentic styles and fresh ingredients are gaining influence.

Top Pizza Menu Claims

- "Gourmet" is the top pizza claim and has more than doubled in menu incidences since 2009.

Top Pizza Menu Items

#		% Change Q2 '09-Q2 '12	#		% Change Q2 '09-Q2 '12
1	Pizza - Cheese	12	11	Pizza - Margherita	50
2	Pizza	-4	12	Pizza - Mexican / Southwestern	-12
3	Pizza - Vegetable	12	13	Pizza - Sausage	18
4	Pizza - Supreme	1	14	Pizza - White	-7
5	Pizza Toppings	-5	15	Pizza - Seafood	-2
6	Pizza - Chicken	24	16	Pizza - Buffalo Chicken	47
7	Pizza - Meat	26	17	Pizza - Tomato	20
8	Pizza - Pepperoni	21	18	Pizza - Pesto	-38
9	Pizza - BBQ	25	19	Pizza - Alfredo	28
10	Hawaiian	24	20	Pizza - Greek	-21

Top Pizza Menu Claims

#		% Change Q2 '09-Q2 '12	#		% Change Q2 '09-Q2 '12
1	Gourmet	135	11	Homemade	35
2	Vegetarian/Vegan	21	12	Light	-41
3	Signature	99	13	Low Carb	-96
4	Traditional	14	14	Healthy	1,900
5	Classic	281	15	Neapolitan-Style	60
6	Gluten-Free	9,100	16	House	380
7	Fresh	0	17	Natural	-20
8	Original	293	18	Organic	-20
9	Premium	-51	19	Low Calorie	-44
10	Tuscan	29	20	Authentic	100

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Beyond price wars and speedy delivery, pizza is becoming a more upscale item with fresh ingredients, fancier cheese and hand crafting.

- “Gluten-free,” barely a mention in 2009, is now the highest growth claim as major chains have added this option; the less specific “healthy” has the second highest growth. Other growing claims, such as “signature,” “classic,” “original” and “house,” show how operators are bringing distinct elements to a crowded pizza market.

Top Pizza Ingredients

- Crust ingredients (whole wheat, multi-grain, gluten-free) are becoming increasingly important, putting crust at the top of ingredient mentions.
- Beyond the basic crust, sauce and cheese components, protein toppings like pepperoni, sausage and ham, show steady growth in menu incidences. Chicken shows even stronger growth, up a strong 12%, yet another indication that pizza operators are relying on this less expensive protein, while pricier beef shows a slight decline in menu usage (-2%). Bacon, a popular ingredient all over menus, also shows strong growth on pizza (+11%).

Top Pizza Ingredients

#		% Change Q2 '09-Q2 '12	#		% Change Q2 '09-Q2 '12
1	Pizza Crust	15	11	Olive (black)	-3
2	Sauce	14	12	Beef	-2
3	Cheese	17	13	Bacon	11
4	Mozzarella Cheese	10	14	Tomato Sauce	-6
5	Tomato	5	15	Sausage	7
6	Pepperoni	7	16	Ham	2
7	Mushroom	1	17	Pineapple	-3
8	Onion	3	18	Garlic	6
9	Chicken	12	19	Italian Sausage	-1
10	Green Bell Pepper	-4	20	Jalapeno Pepper	-8

Top 10 Basic Toppings

Sauce	Meat	Cheese
Sauce (Unspecified)	Pepperoni	Cheese (Unspecified)
Tomato	Chicken	Mozzarella
BBQ Sauce	Bacon	Cheddar
Pesto	Beef	Parmesan
Alfredo	Sausage	Feta
White Sauce	Ham	Provolone
Marinara Sauce	Italian Sausage	Fresh Mozzarella
Garlic Sauce	Canadian Bacon	Soy Cheese
Ranch Sauce	Salami	Ricotta
Buffalo Sauce	Meatball (Beef)	Romano

Insights To Go

- Freshen Up:** Sliced tomatoes, basil leaves and even salad toppings on top of finished pizzas help put a fresh image on a favorite food
- Get Creative with Crust:** Custom grain blends, different thickness and gluten-free are all important
- Circle the Globe:** A few exotic pies (Mexican, Greek) can keep customers interested in the format
- Cheese Pleases:** Cheese is an easy ingredient for taking chances: try other Italian varieties, or feta, Manchego, etc.
- Do More with Dough:** Consider flatbread appetizers, sandwiches, dippable appetizer bites