



# 2021 ASENZYA® TREND REPORT: PIZZA

FALL 2021

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# TREND FORECAST: PIZZA

EXPLORING THE FUTURE OF FOOD



**ASENZYA**

A FUSION OF FLAVOR & FUNCTION

**ASENZYA IS A  
COMPLETE CUSTOM  
BLEND MANUFACTURER  
THAT DELIVERS:**

- CUSTOM BLENDS
- FUNCTIONAL INGREDIENTS
- IN HOUSE GRINDING
- R&D FACILITIES
- CULINARY TREND TRACKING
- 60+ YEARS OF EXPERIENCE

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 ASENZYA	TRENDING FLAVORS
Issue # 0012	MEXICAN SALSAS
asenzya.com · 414-764-1220	



**SALSA VERDE**  
sahl-suh vur-dee



**SALSA ROJA**  
sahl-suh roh-uh



**GUACAMOLE**  
muh-kah-moh-lee



**SALSA BORRACHA**  
sahl-suh bor-rah-kah



**PICO DE GALLO**  
peeh-kah day gah-yoh



**SALSA GUACAMOLE**  
sahl-suh muh-kah-moh-lee



**SALSA DE MOLCAJETE**  
sahl-suh day mohl-kah-hete

OTHER NAMES: Salsa verde casera, salsa verde taquera, salsa de tomatillo.  
FLAVOR PROFILE: Mild

**CULINARY TREND INSIGHT**  
BLOGS / WHITE PAPERS / TREND BROCHURES / TREND SPOTLIGHTS / TREND REPORTS

OTHER NAMES: Salsa tatemada machacada.  
PROFILE: A charred  
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# 2021 ASENZYA TREND REPORT: PIZZA OVERVIEW

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## PIZZA: TOP MENU MENTIONS



Flatbread pizza is the only type in the top five pizzas to have dropped in menu mentions in Q3 2017-20 (-45%). Likely it is not seen as a style of pizza that travels well or holds heat like its more doughy counterparts.

Classic options are thriving with cheese pizza (+17%), vegetable pizza (+31%) and meat pizza (+32%) all showing growth in the same time period. Supreme, however, has seen the most growth with a 50% increase in menu mentions.

Source: Mintel Menu Insights



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## PIZZA MENU VEGETARIAN/VEGAN CLAIMS

The Vegetarian and Flexitarian lifestyles continue to gain in popularity and pizza restaurants are responding.

VEGETARIAN/VEGAN AS A  
MENU ITEM

**+56%**

Menu item claim menu incidence  
Q1 2017-Q1 2020 (# menu mentions)

VEGETARIAN/VEGAN  
INGREDIENT CLAIM

**+25%**

Ingredient claim: menu incidence  
Q3 2017-Q3 2020 (# menu mentions)

VEGETABLES AS  
INGREDIENTS

**+12%**

Ingredient by time period: menu  
incidence Q1 2017-Q1 2020 (# menu  
mentions)

Source: Mintel Menu Insights

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## PIZZA MENU GLUTEN FREE CLAIMS

Pizzas that cater to special diet needs are growing in popularity on menus. Gluten-free pizzas in particular are booming.



GLUTEN-FREE AS A MENU  
ITEM CLAIM

**+112%**

Menu Item claim: menu incidence  
Q1 2017-Q1 2020 (# menu mentions)

GLUTEN-FREE  
INGREDIENT CLAIM

**+191%**

Ingredient claim: menu incidence  
Q3 2017-Q3 2020 (# menu mentions)

Source: Mintel Menu Insights

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## OPERATORS CAN USE CHEESE TO SET THE STAGE FOR INNOVATION

The five fastest-growing cheeses for pizza between Q3 2017-20 are Mozzarella, Cheddar, Parmesan, Feta and Provolone. As the pandemic drags on and consumers grow bored with their go-to pizza orders, cheese is an excellent opportunity for operators to offer something unique and different without straying too far away from the comfort of a pizza. For example truffle mozzarella or honey goat cheese can add flavor while setting the stage for classic toppings.



#1  
Mozzarella  
cheese



#2  
Cheddar  
cheese



#3  
Parmesan  
cheese



#4  
Feta  
cheese



#5  
Provolone  
cheese

Source: Mintel Menu Insights

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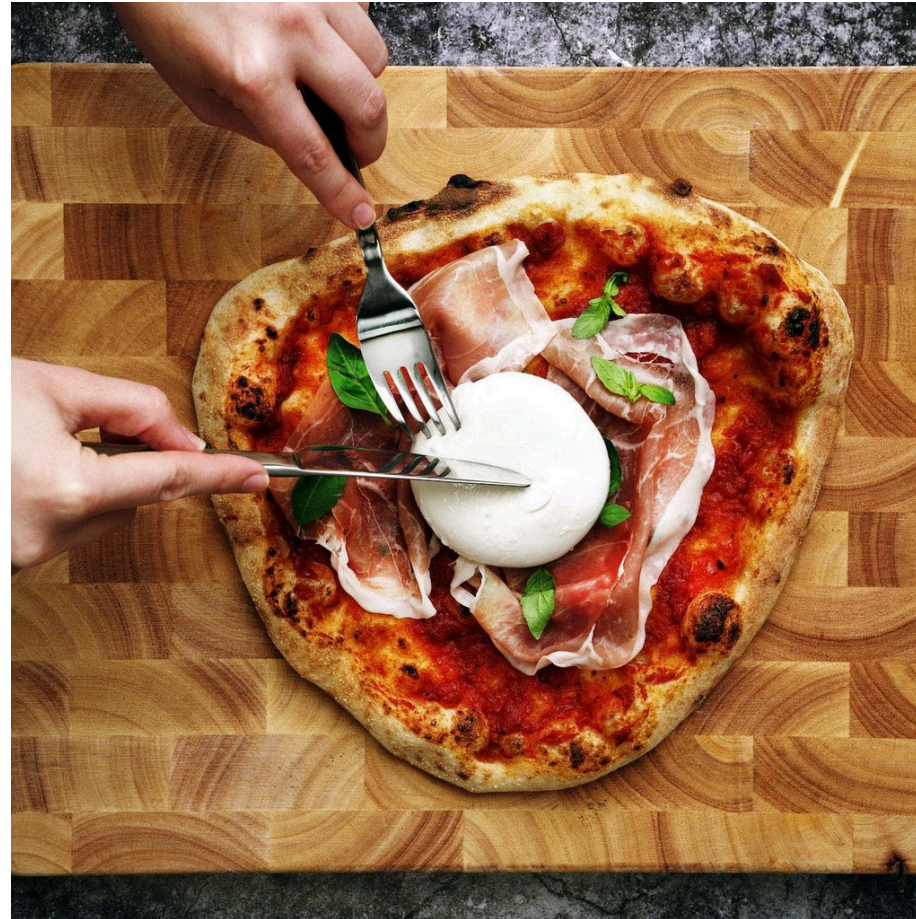
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## A CHEESE TREND TO WATCH

Burrata cheese grew on menus with both pastas (+89%) and pizzas (+130%) and has quickly become a consumer favorite that's shared frequently on social media. Shaped by hand, burrata consists of a soft, fresh mozzarella casing filled with a creamy center, and creates an opportunity to add contrasting textures to pizza and pasta dishes.



Source: Mintel Menu Insights

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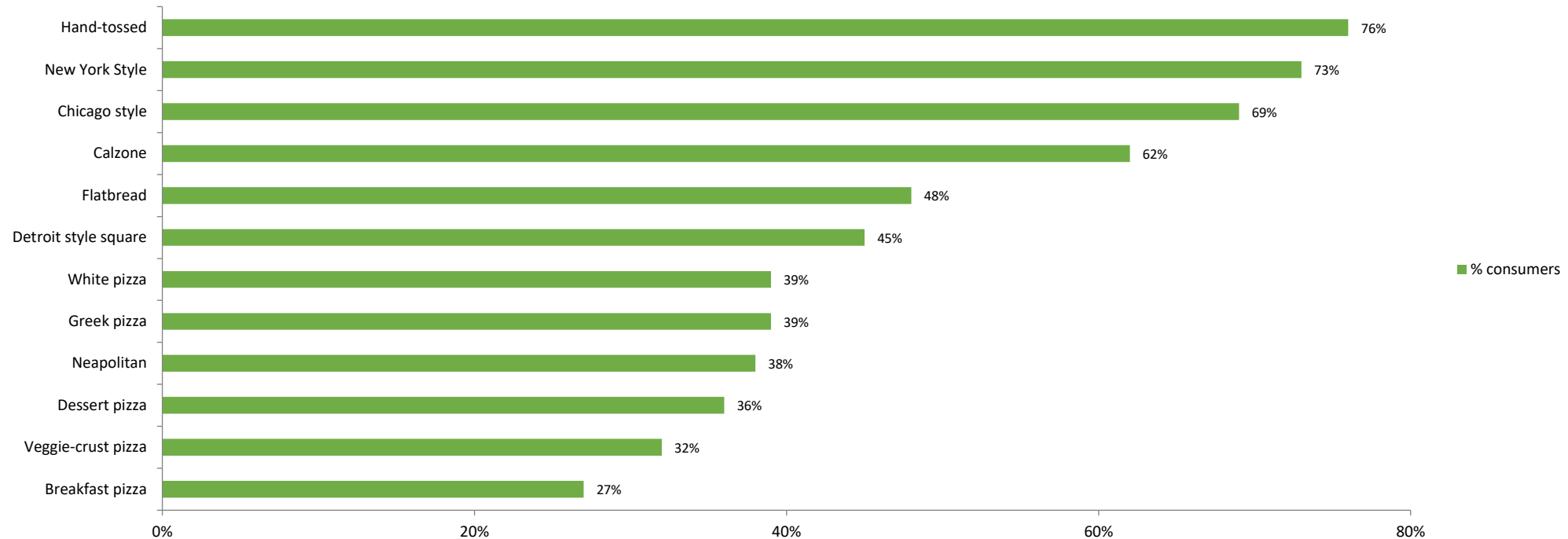




## CONSUMERS ARE INTERESTED IN SPECIALTY PIZZAS FROM RESTAURANTS

76% of consumers are interested in hand-tossed pizzas from restaurants. Consumers are looking for styles of pizza they cannot or will not make for themselves from restaurants.

US: "Where would you be interested in getting the following types of pizza from? Please select all that apply per type of pizza," restaurant pizza, July 2020



Base: 1,909 internet users aged 18+ whose household has eaten pizza in the last three months

Source: Lightspeed/Mintel

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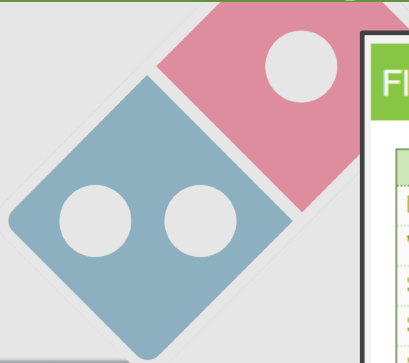


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## PIZZA: Flavor of Ingredients



Flavor of Ingredient by Time Period Expand

	2017-Q1	2018-Q1	2019-Q1	2020-Q1	Total Unique Items
Herb (All)	1,706	1,683	1,729	1,718	6,859
Vegetable (All)	603	643	718	764	2,728
Spicy (All)	539	499	573	602	2,213
Smoked (All)	504	492	561	646	2,203
Spice (All)	478	524	496	464	1,962
Cheese (All)	472	448	386	467	1,773
Fruit (All)	388	326	376	359	1,449
Sweet (All)	283	263	321	357	1,224
Butter (All)	254	261	298	298	1,111
Hot (All)	285	265	248	294	1,092
<b>Total Unique Items</b>	<b>11,329</b>	<b>11,654</b>	<b>12,352</b>	<b>12,967</b>	<b>48,304</b>



Menu Insights

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**+26.7%**

Vegetable between 2017 – 2020 Q1

**+11.6%**

Spicy between 2017 – 2020 Q1

**+28%**

Smoked between 2017 – 2020 1qtr

Source: Mintel menu insights

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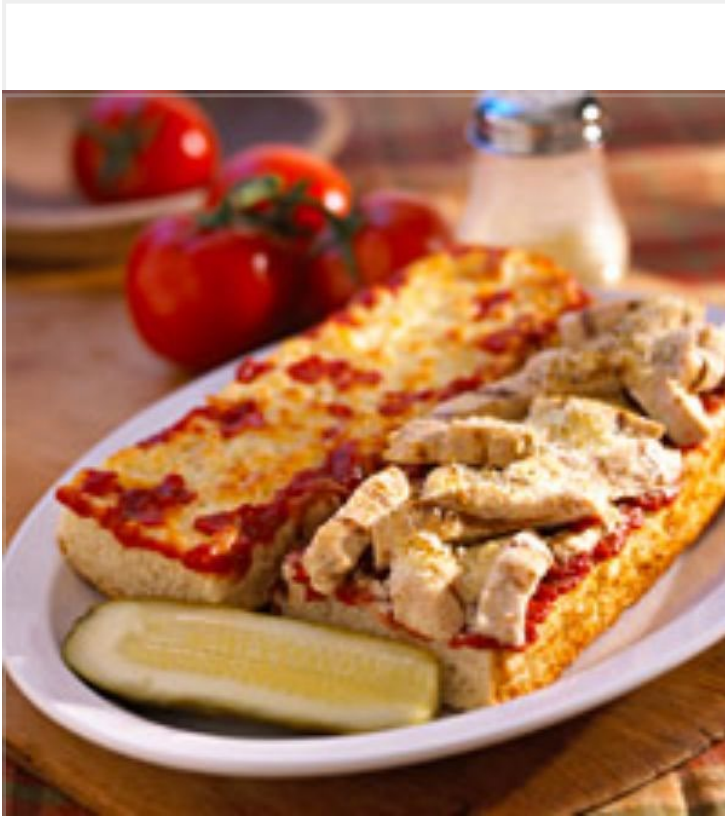


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## SICILIAN PIZZA OFFERS INDULGENCE AND FRESHNESS



[Bellacino's](#) Sicilian Square Pizza

*Base: 1,909 internet users aged 18+ whose household has eaten pizza in the last three months*

*Source: Mintel Menu Insights*

Sicilian pizza has seen a significant increase in menu mentions from Q3 2017-20, though directional due to a low base. Sicilian pizza usually has a very thick dough and sometimes is made with the cheese under the sauce. Both of these qualities make it more effective for delivery as the cheese acts as a barrier to prevent the dough from getting soggy. [74% of consumers](#) have indicated they are interested in trying Sicilian cuisine.

Additionally, Sicilian pizzas' thick bready crust and extra sauce gives it an air of indulgence, which consumers are craving right now. [82% of consumers](#) indicate that pizza is one of their favorite comfort foods. Operators have an opportunity to turn to Sicilian pizza for functionality of delivery and also to offer the most indulgent, comforting pizza they possibly can.



# TREND FORECAST: PIZZA

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While NY style is the total most searched pizza style the past 12 months, Detroit style makes big jump. This could be due to Pizza Hut launching a new Detroit style in January 2021.

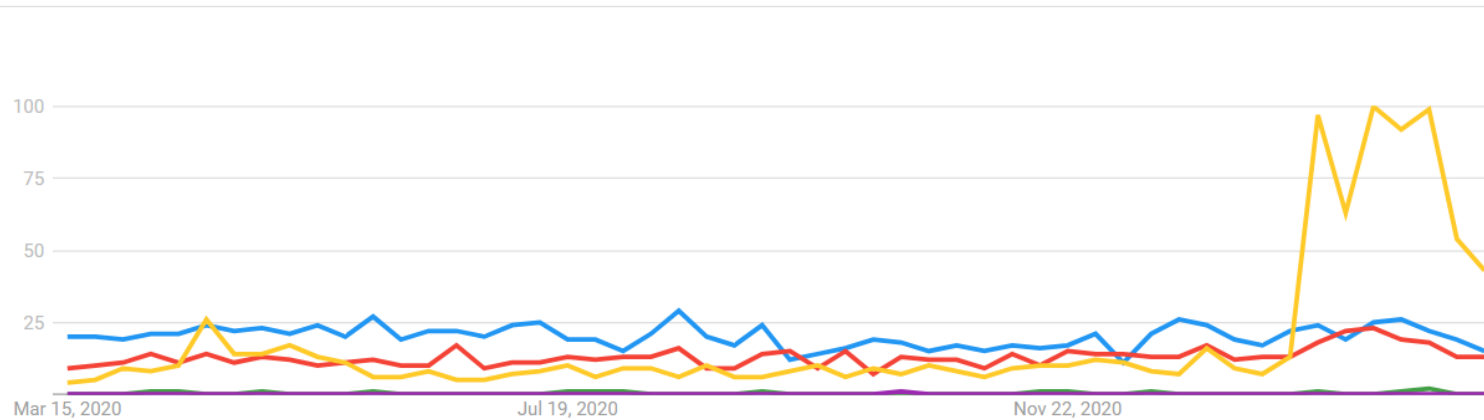
- New York-style pizza Topic
- Chicago style pizza Search term
- Detroit style pizza Search term
- California style pizza Search term
- St. Louis style pizza Search term

United States Past 12 months All categories Web Search

Note: This comparison contains both Search terms and Topics, which are measured differently.

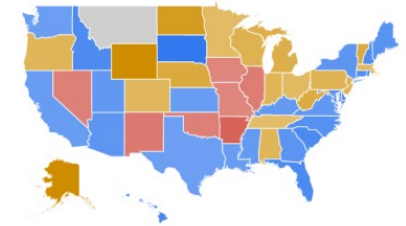
LEARN MORE

Interest over time



Compared breakdown by subregion

- New York-style pizza
- Chicago style pizza
- Detroit style pizza
- California style pizza
- St. Louis style pizza



Sort: Interest for Detroit style pizza

1	Wyoming	Yellow bar
2	Alaska	Yellow bar
3	North Dakota	Blue and Yellow bars
4	District of Columbia	Blue, Red, and Yellow bars
5	Nebraska	Blue, Red, and Yellow bars

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## PIZZA: Gluten free examples

NATIONWIDE CHAIN – 800 Locations



### GARDEN PIZZA BOWL:

Crustless pizza with mushrooms, black olives, onions, and sliced tomatoes, baked with our original sauce and signature three cheeses.

CA BASED CHAIN– 140 locations



### GF CAULIFLOWER:

topped with fresh vegetables. Made with gluten-free Cauliflower Crust, Herb Butter, Mozzarella, Grape Tomato, Green Pepper, Artichokes, and Basil.

2 LOCATIONS, Denver, CO



### THIN DETROIT STYLE:

A thin square 100% Yeast raised, wheat free crust.

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## PIZZA: Vegetarian/Vegan

CA BASED CHAIN - 22 locations



### THE IMPOSSIBLE PIZZA:

fresh mozzarella topped with impossible meat made from plants served on a choice of a **gluten-free** crust or cauliflower crust. No artificial ingredients, preservatives or fillers.

PORTLAND, OR



### VEGAN RANCH SUPREME:

Cilantro, red bell peppers, vegan bacon, vegan chicken and drizzled with buffalo sauce. On Rudy's vegan dill ranch.

AUSTIN, TX – Li'l Nonna's



### BEETERONI 'N CHEESE:

Betteroni, Organic tomato sauce and house made vegan mozzarella.

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## PIZZA: Culinary mash ups

MINNEAPOLIS, MN



### KOREAN BBQ PIZZA:

Beef short ribs, mozzarella, scallions, arugula, sesame, soy-chili vinaigrette

WA BASED CHAIN - 4 locations



### BUTTER CHICKEN PIZZA:

Butter chicken marinated in Can-Am special curry sauce, onions, green peppers, tomatoes, mozzarella cheese & pizza sauce.

DETROIT, MI



### TANDOORI DETROIT PIZZA:

Tandoori chicken breast, cheese, and red onions, made with special tandoori sauce.

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## PIZZA: White Pies

WI BASED CHIAN - 6 locations

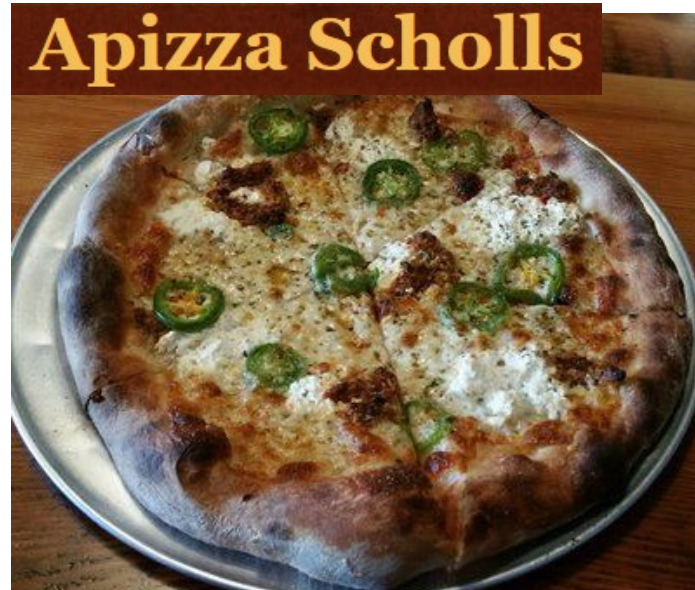
PORTLAND, OR

LOS ANGELES, CA



### **BUFFALO CHICKEN:**

Crema, Mozzarella, Spicy Chicken, & Bleu Cheese.



### **DIABLO BLANCO:**

ricotta, roasted tomato pesto (Roasted tomatoes, toasted pumpkin seeds, cilantro, garlic, salt, pepper), herbs, black pepper, & fresh Jalapeño \*NO Sauce\*.



### **BRUSSEL SPROUTS PIZZA:**

mozzarella, red onion, pancetta & panna.

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**Asenzya® is a full service seasoning manufacturer ready to help with your next project!**

*Custom  
Blend  
Development*

*Blend  
Matching*

*Cost Savings*

*Culinary  
Trend  
Insights*

For information on culinary trends or help from Asenzya® with any seasoning project, please visit our website at [Asenzya.com](https://Asenzya.com) or reach out to your Asenzya Business Development Manager!

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## Thank you!

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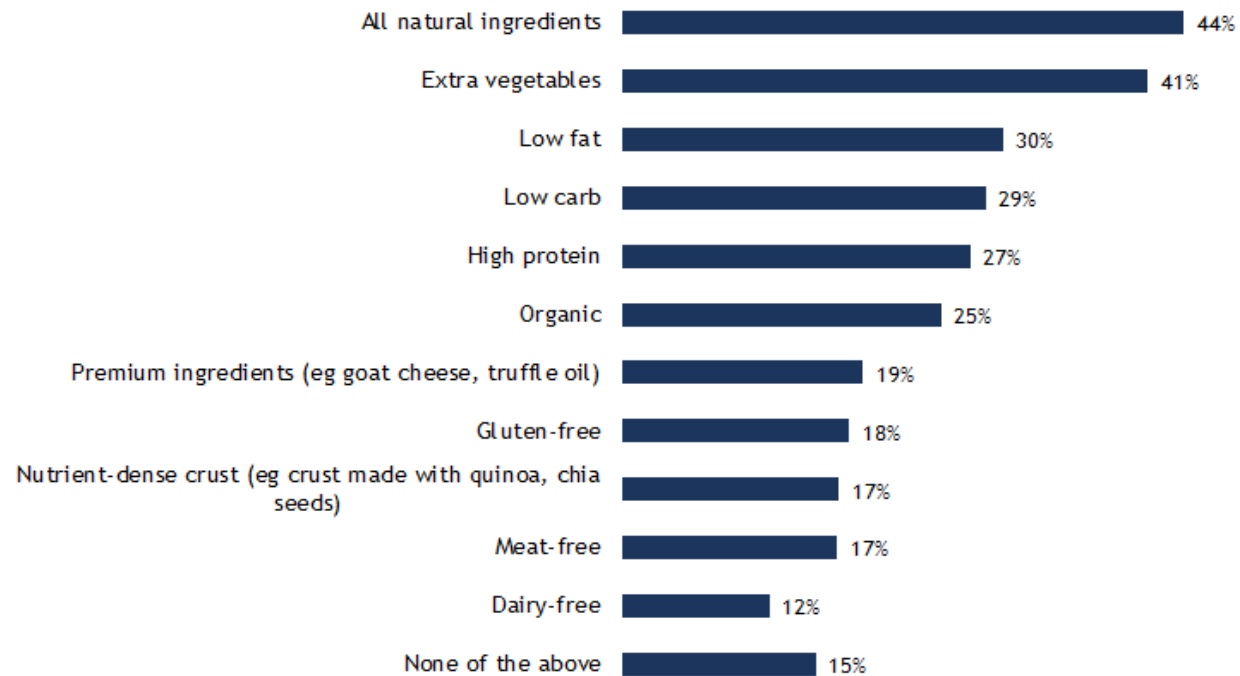
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# Pair nutrient-dense ingredients and BFY claims for permissibility

Health is not a top priority for pizza consumers, but it is desired. Brands can start with a focus on ingredients, especially vegetables; 44% note that all-natural ingredients make a pizza healthier, and 41% agree extra vegetables make a pizza healthier. Consider how to incorporate vegetables into products in traditional and untraditional ways. As toppings, in sauces and in crusts are all options and blended crusts will be an opportunity for brands to marry health and indulgence

## HEALTHY PIZZA ATTRIBUTES, 2021



"Which of the following do you think make a pizza healthier? Please select all that apply. "

Base: 1,914 internet users aged 18+ who have eaten any type of pizza in the past three months

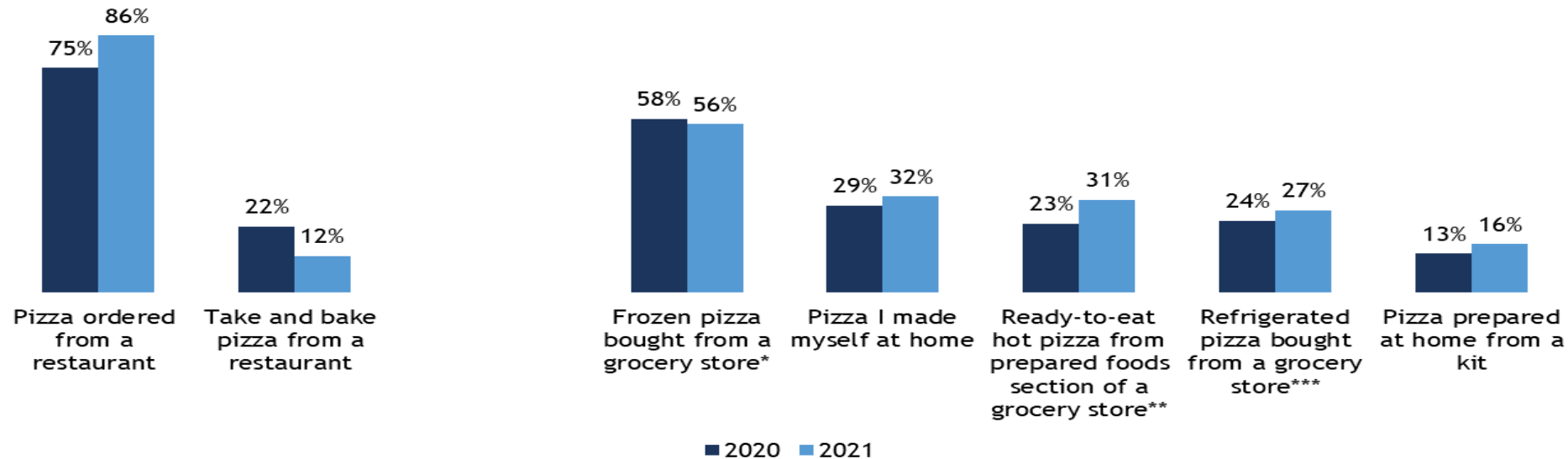
SOURCE: KANTAR PROFILES/MINTEL, JULY 2020, APRIL 2021



# Restaurant pizza's lead intensifies

Pizza from a restaurant remains the most popular option among US adults, with a 20 point lead over frozen pizza from the store. While consumers note the category's advantages in convenience and affordability, foodservice wins in quality; 78% of households that eat pizza agree that restaurant pizza is higher quality than frozen pizza. Lost foot traffic from the COVID-19 pandemic encouraged pizza restaurants to make pizza ordering and delivery as convenient as possible, and store brands will be challenged to demonstrate their value to consumers as restaurants do so.

## PIZZA CONSUMPTION, 2020 AND 2021



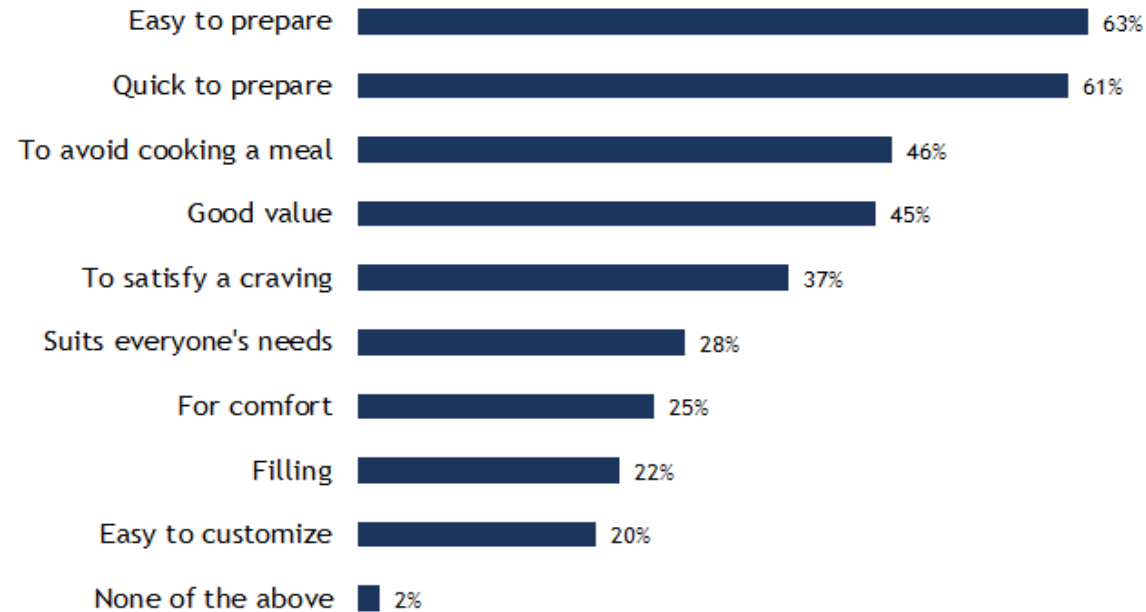
2020: "Which of the following types of pizza has your household eaten in the past three months? Please select all that apply."; 2021: "Which of the following types of pizza have you or members of your household eaten in the past three months? Please select all that apply."  
Base: 2,000 internet users aged 18+  
\*2020: Frozen pizza bought at a grocery store; \*\*2020: Ready-to-eat hot pizza from the deli/prepared foods section of a grocery store; \*\*\*2020: Refrigerated pizza bought at a grocery store  
SOURCE: KANTAR PROFILES/MINTEL, JULY 2020, APRIL 2021



# Convenience and affordability continue relevance in 2021

Consumers are expected to navigate prolonged remote working, cooking fatigue and economic uncertainty in 2021, all of which can be served by the category's strengths in convenience and value. Consumers who live in households that eat pizza note that quick and easy preparation and good value are top motivators to choosing pizza from the store, rather than from a restaurant. At-home lunches for remote workers and other solo occasions, such as gaming, will be served well by quick and easy meal solutions, including pizza, where consumers aren't motivated to cook a meal themselves.

## PIZZA MOTIVATIONS, 2021



"Which of the following are reasons why you or members of your household eat pizza bought from the store (eg frozen, refrigerated, prepared section)? Please select all that apply."

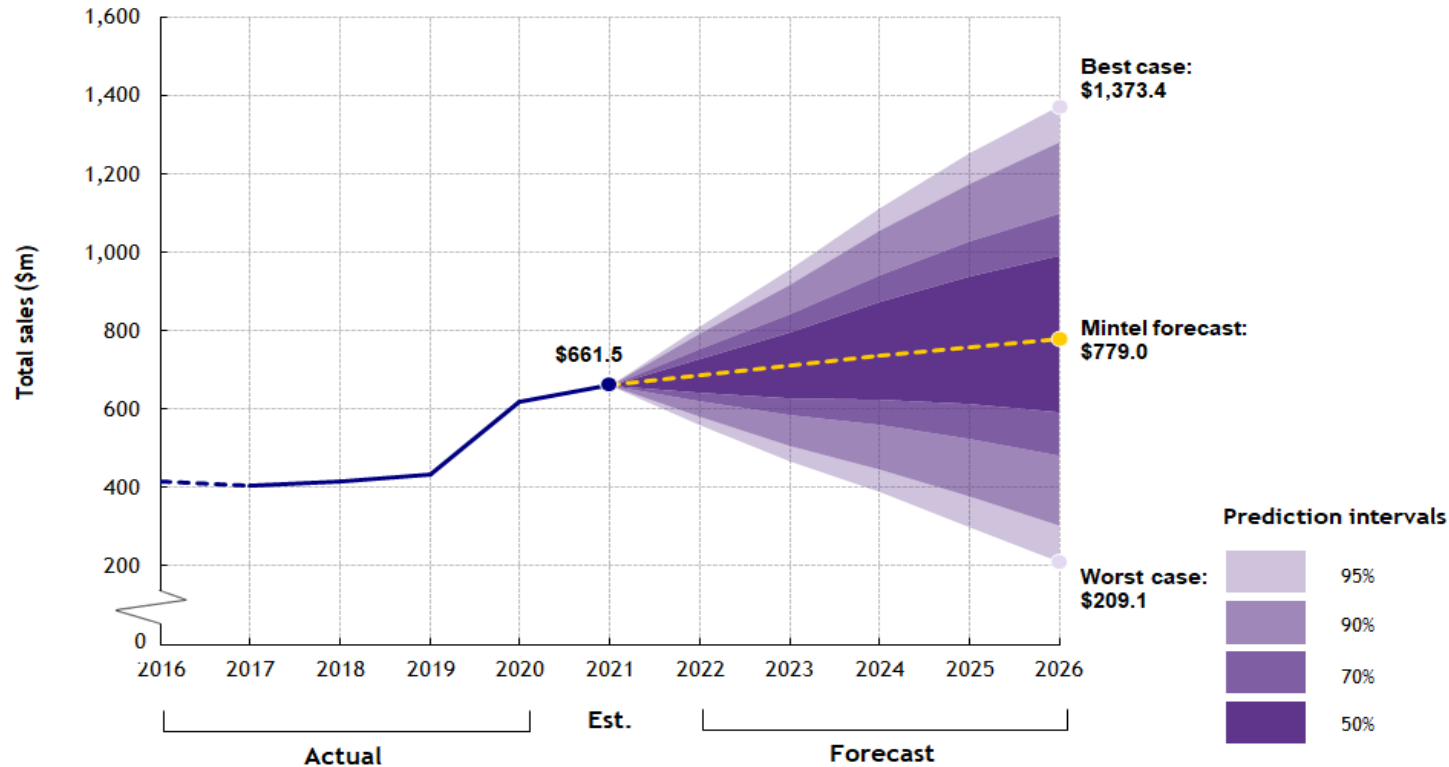
Base: 1,391 internet users aged 18+ who have or whose household has eaten any type of pizza bought from the store in the past three months

SOURCE: KANTAR PROFILES/MINTEL, APRIL 2021

# Slow, steady growth expected through 2026

From 2022 through 2026, the category is expected to experience slow but steady growth as consumers shift to some pre-pandemic routines and renew their health goals. Category players can drive stronger growth with an investment in premium kits and components as well as targeting the at-home lunch occasion. An investment in high-quality ingredients, specialty preparation methods and unique toppings will also be essential to competing with pizza restaurants.

TOTAL US SALES AND FAN CHART FORECAST OF PIZZA, AT CURRENT PRICES, 2016-26





<b>Pizza motivations</b>											
<i>"Which of the following are reasons why you or members of your household eat pizza bought from the store (eg frozen, refrigerated, prepared section)? Please select all that apply."</i>											
<b>Base: 1,391 internet users aged 18+ who have eaten any type of pizza bought from the store in the past three months</b>											
	Sample	Easy to prepare	Quick to prepare	To avoid cooking a meal	Good value	To satisfy a craving	Suits everyone's needs	For comfort	Filling	Easy to customize	None of the above
<b>All</b>	1391	63%	61%	46%	45%	37%	28%	25%	22%	20%	2%
<b>Generation</b>											
Generation Z	186	56%	58%	45%	41%	40%	30%	25%	27%	25%	4%
Millennials	485	58%	55%	44%	44%	39%	33%	33%	26%	23%	1%
Generation X	352	65%	63%	45%	48%	35%	25%	23%	20%	19%	1%
Baby Boomers	299	70%	68%	48%	43%	34%	24%	19%	16%	15%	3%
World War II/Swing Generation	69*	-	-	-	-	-	-	-	-	-	-
<b>Generation</b>											
Generation Z	186	56%	58%	45%	41%	40%	30%	25%	27%	25%	4%
Younger Millennials	215	58%	53%	49%	43%	41%	32%	30%	26%	23%	1%
Older Millennials	270	58%	52%	40%	44%	37%	33%	35%	25%	23%	1%
Generation X and older	720	68%	66%	47%	46%	35%	24%	21%	19%	18%	2%
<b>Generation</b>											
Generation Z	186	56%	58%	45%	41%	40%	30%	25%	27%	25%	4%
Millennials	485	58%	55%	44%	44%	39%	33%	33%	26%	23%	1%
Generation X and older	720	68%	66%	47%	46%	35%	24%	21%	19%	18%	2%
* Small sub-sample: 75 to 100 is a low base size; Below 75, the base size is too low for data to be meaningful so the data points are not displayed.											
Source: Lightspeed/Mintel Fieldwork: April 2021											
<a href="#">View databook online: Pizza - US - 2021</a>											
<a href="#">View methodology online: US Reports report methodology</a>											