## inspiration



## PIZZA TRENDS

## Affordable and convenient, pizza will always be prized by eaters. Artisanal, authentic, visually stunning and diet-catering versions featuring premium and global ingredients and hyperlocal techniques are providing areas of growth.

Our reliance on Pizza, whether it's delivered, frozen, healthy or homemade, will be an ingrained dining habit for the foreseeable future. Here are the key trends positioning pizza for future growth in 2021 and beyond:

## Trend exploration

- Elevated experiences: premium ingredients and an artisanal approach
- Exploratory styles: international and regional American eating styles such as calzones, pizza burritos, and Apizza that are gaining traction to be the next big thing
- Future formats: square-pan, alternative crusts and shapes gaining traction with pizza makers
- Fresh from the freezer: once frowned upon by pizza snobs, frozen pizza has revolutionised the market, offering high quality products from some of the most authentic restaurants and brands
- Food waste wonder: the rise of food waste reduction mindsets and how frozen foods and pizza can be mobilised to reduce food waste.
- Augmented textures and flavours: experience-seekers are finding pizzas that take sensory encounters to heightened levels
- Arresting visual effects: pizza makers are using dramatic techniques to draw consumer attention and increase sales
- Pizzas catering to dietary lifestyles: plant-based, nourishing, and beneficial ingredients that are offering those with dietary requirements the opportunity to indulge
- Sweet Success: create indulgent and different ways for your customers to round off their meals.
- Heroes and sidekicks: how sides can elevate your menu, win you business and improve your profit margins.



## Pizza's popularity was already surging pre-Covid19. Now, it's set to soar even higher.

Reliable, customisable, affordable, profitable, and adaptable, pizza does what few other foods can - it goes above and beyond. Before Covid19, pizza was poised for global expansion with Statista projecting a $5 \%$ growth rate in Latin America, Eastern Europe, Asia Pacific and EMEA from 2019 to 2023. In 2022, Kantar reported that the global pizza market was valued at $£ 2.64$ bn and expected to continue growing into 2023.

Pizza's global presence makes it easy for consumers to think they know the best spots around them. This can lead to them seeking out new pizza restaurants and experiences that uphold classic Neapolitan standards or set new innovative ones. Regional and international pizza styles are storming their way into markets around the world right now and showing off their dramatic visual and textural features, like the crisp edges of a Detroit-style pan pizza or the chewy crusts from East Asia.

Statistically, New York and Naples have been regarded as Pizza arbiters*. In 2021, Pizza had the highest market value in North America ( $\$ 56.5 \mathrm{bn}$ ) followed by Western Europe (\$49.3bn) *. Whilst it might be assumed that these regions are the breeding ground for global trends, that's not entirely true. Some of the most interesting and exciting innovations are coming from the Asia-Pacific region; a part of the world with the least claim to pizza heritage.

The new Pizza Perfettissima range from Dr. Oetker Professional combines traditional cooking techniques with long fermented dough and frozen technology to capture the authentic flavours

# ELEVATED EXPERIENCES: 

## High-temperature, wood-fired pizza produced according to official Neapolitan rules has proliferated for decades. The appeal of authentic flavour and technique make it a trend with room to grow.



Traditional Neapolitan pizza is made strictly with Italian ingredients to make a saucy, floppy, and charred delicacy, famous for its billowing and chewy crusts. The appeal and desire for this pizza experience is expanding far outside the realms of Naples and as such, consumers are looking for signifiers of authenticity in their search for pizza. This is clear by the number of pizzerias certified by the AVPN (the Associazione Verace Pizza Napoletana, the Italian non-profit arbiter of Neapolitan pizza tradition) which has reached almost 1000 across 48 countries.


In February, Italy's most storied Neapolitan pizzeria, century-old L'Antica Pizzeria da Michele opened its second London location, further evidence of the desirability of traditional pizza. Whilst pragmatically traditional pizzas are all the rage, there are legions of pizzerias from Brazil to Hong Kong that are honing their wood-fired pizza oven skills whilst varying from tradition in other areas of the process.


Last December, New York City-born, Neapolitan-like pizzeria Motorino (with locations in Malaysia and Singapore) opened in Dubai. In Cairo, What The Crust? opened this year, serving pizzas made by AVPN-trained pizzaiola and co-owner Dareen Akkad. In 2020, Brooklyn-based international pizza consultant Anthony Falco, who has worked with nearly 40 clients to open Neapolitan-like pizzerias around the world, helped open pizzerias in Argentina and Istanbul.

Some countries have adapted authenticity to create unique styles. In Japan, Susumu Kakinuma's Seirinkan's salt-crusted Neapolitan pies have inspired followers. In Hong Kong, newly opened Emmer Pizzeria \& Cafe debuted pizza with salmon.


## Oroetker

Professional

## What are we doing?

Our range of hand-thrown style authentic pizzas use fast-frozen, extra-long fermented dough to create a crust that puffs and chars when cooked in a stone based oven and works as a fullycustomisable solution across day and night parts.

Why not provide your customers with unlimited options and let them customise their pizzas as they see fit, such as half and half flavours or even a different flavour every quarter! Doing this will open up more interactive sharing occasions and allow you to develop a new USP.


Founders Matt and Emily Hyland helped kickstart the renaissance of Detroit-style pizza with their restaurant Emmy Squared in 2016

A pickle pizza with fresh dill, Grana Padano cream sauce and spring onion at Detroit Pizza London


A vegan square slice from Box Car Pizza made using mozzarella, marinated chicken, roasted tomatoes, lettuce, pickled onion, and Italian vinaigrette aioli.

## EXPLORATORY STYLES:

Recognition of local styles like Detroit squares has accelerated demand for other regional American and international styles.


More than ever, food lovers want something different to eat and to travel via their taste buds. Pizza offers an affordable way to do so
We've tracked the growing popularity of regional styles for years and, of the many, one trend we have noticed is New Haven Apizza with its signature coal-fired, thin-crust. Frank Pepe Pizzeria Napoletana, its originator, already have 12 locations open with more planned. In 2020, pizzerias serving this style opened in Portland, Oregon (Dimo's), Scottsdale, Arizona (Virtu) and Las Vegas (Ciao Ciao).
A pizza was even featured in the documentary "Pizza, A Love Story" by Gorman Bechard. Equally, Chicago deep-dish has proliferated outside Illinois so much so that it is now a globally recognised alternative to the traditional Neapolitan. St. Louis-style pizza featuring Provel (a white processed cheese with a low melting point that is gooey and buttery at room temperature) has landed in New York City and centimetre-thin bar pies, popular in coastal Massachusetts, Connecticut, and parts of the Midwest have also gained media attention. In our continuing efforts to explore new styles of pizza, we have launched Chicago Town Crispy thin base, a pizza variety that pre-dates the deep dish. Where Neapolitan and New York style pizzas are cut into triangles, Thin Crust is cut "tavern style" into squares to be enjoyed alongside cheap beer and good company.


Often overshadowed, but just as culturally significant, calzones are a fantastic way to let consumers experience something a bit different to the norm. Despite being originally invented as a casual way to enjoy pizza whilst standing on the street, there's no reason for you not to put your own spin on it and have it treated as a decadent sit-down meal.


## How can you action this?

acrion
Take advantage of diners' curiosity and pull them in with premium and artisanal versions of regional American, Italian, and international styles of pizza. Offering unique, underexposed styles on your menu will diversify you from your competitors and give your business the edge.
Our Pizza Perfettissima Puro Base's limits are as far as your imagination. Try lining a deep pizza pan with ingredients such as grated parmesan, honey, seeds, crispy onions, doritos or other flavours before pressing your dough into the tin to level up your flavours, textures and visuals alike.
You can also lay your ingredients across one half of the Puro Base and then fold it over to create an easy-win calzone or even roll the whole thing up and create a pizza burrito.


The clam pie at Frank Pepe Pizzeria Napoletana in New Haven, Connecticut is one of America's most celebrated regional pizzas

## What are we doing?

Inspired by "tavern style" pizza, a pizza variation native to Chicago, we have launched our new line of Chicago Town Thin Crust pizzas in two flavours, Loaded Cheese and Sausage ' $N$ ' Pepperoni.

Designed to be thin and crispy with toppings from edge to edge for maximum sharing potential, this is the perfect product for grazing tables or group bar-snacks.

Focaccia col formaggio di Recco features stracchino cheese between paper-thin dough.


Last year, José Andrés' Mercado Little Spain introduced New York City to Catalan Coca (seen right), which is distinguished by its deep dish pizza features - copious amounts of cheese, a chunky tomato sauce, and a high crust formed by being pan-cooked.


Gabriele Bonci, one of Rome's most famous pizzaioli, uses heirloom flour, natural yeast, and slow fermentation to create his popular pizzas.

Our Pizza Perfettissima and Puro ranges are made using extra-long fermented dough to achieve a true taste of authenticity.


## FRESH FROM THE FREEZER:

The frozen food aisle was already an area for growth for premium pizzas. Covid-19 accelerated the trend, with struggling restaurants entering the market with quality, clearly visible products.

## ELEVATED PIES:

While consumers prize pizza's affordability, pros are turning away from bromated flour with premium pies featuring freshly milled flour and natural fermentation to serve artisanal pies and slices.

Diners are seeking quality versions in this traditionally priceaccessible slice category. Dollar slices (which use mediocre ingredients and technique) in New York City are used as evidence of pizza culture, but high-end slice shops like Scarr's, L'Industrie, Mama's Too! and Upside are celebrated. Owner Scarr Pimentel mills fresh wheat berries to preserve their nutrients in pizza and improve digestibility. Florence native Massimo Laveglia of L'Industrie uses premium Italian ingredients and coldferments dough for three days to boost flavour. Mama's Too!'s meld of New York and Naples styles earned a rare star from the New York Times, while Upside uses a years-old starter nourished by airborne yeasts of 10 nations.

This thoughtful approach has spread beyond New York City. Philadelphia's Shackamaxon makes artisanal slices that have been described as 'art'. Sicily's in Detroit, a 30 -year-old pizzeria, is reinventing itself as a naturally fermented shop. It's going global. In Norway, a small counter tucked behind an indoor minigolf course opened in Oslo in 2018 making slices more appealing than many in New York City. Missing the slices he snacked on at New York University, Rohit Sachdev opened Soho Pizza, an artisanal shop in Bangkok, in 2019. Hoba Pizza in Ulaanbaatar, Mongolia opened in 2020, making high-end New York City-style slices with a mix of premium Italian and Mongolian flours and natural fermentation.

## How you can action this?

Consider adding a premium menu item that takes a serious approach using high-end ingredients. Tell ingredient origin stories and benefits as well. The Pizza Perfettissima range from Dr. Oetker Professional is made from extra-long fermented dough that delivers a light crispy artisan crust.


## AUGMENTED TEXTURES AND FLAVOURS

Companies are elevating consumers' experiences, from crusts to toppings and, interestingly, much of this innovation is being found in Asia.


Consumers shouldn't have to settle. To the non-pizzaiolo among us, crust can often be an overlooked component of the pizza, but that's all starting to change. Free from the pizza traditions of the West, Korean chain Mr. Pizza is pushing their crusts to the crunch point with customisable crusts that include hash browns and egg tarts and come stuffed with cheese and topped with cream cheese. They also serve crustless pizzas so you can either go for full indulgence or nothing at all! Aoki's Pizza chain in Japan feature hot dog-stuffed crusts, oozing cheese crusts, and unorthodox toppings like rice cakes.


India's Laziz Pizza offers peri-peri paneer.


Western-originated brands are more adventurous in these markets. Last year, Domino's South Korea launched Doublecrust Iberico Pizza: two layers of pizza joined with sweet potato mousse and a coconut honey powder-dusted crust. In the Philippines, Pizza Hut launched Spam Cheesy Bites crust and Beer Pan Pizza, promising the aroma of beer, crispy chicken skin and a 'beer sprinkle' finish. In New Zealand, it partnered with Wattie's on Pineapple Spaghetti Pizza. In Taiwan, Japanese ramen chain Menya Musashi collaborated with Pizza Hut on a ramen-topped pizza.

This trend is catching on in the US. Maryland-based chain Ledo infused its Hot Chicken Pizza crust with Old Bay. Philadelphia's Pizza Jawn has built on the sesame-coated underside microtrend, begun at Paulie Gee's Slice Shop in Brooklyn, for nuttiness and a crust-crisping boost. Boston ramen spot Yume Wo Katare pivoted to ramen flour crust pizza.


## How can you action this?

Re-examine essential components and apply heightened textural contrasts and flavour boosts, such as blow-torching ingredients right before being sent to the customer or dressing the crust with honey pre-oven for a delicious caramelised crust.
Star pubs have adopted this trend in a number of their locations by adding a pinch of fresh rocket to their Pizza Perfettissima Calabrese to create a strong visual appearance that is also functional.


The microtrend of an entire sesame underside (for nuttiness and a crust-crisping boost) started at Paulie Gee's Slice Shop in Brooklyn.


India's Laziz Pizza offers peri-peri paneer pizza.


Korean chain Mr. Pizza's customizable crusts include hash browns and egg tart, and come topped with cream cheese and filled with cheese (left); in Boston, ramen spot Yume Wo Katare pandemic-pivoted to pizza with a ramen flour crust. (right)


In Japan, Aoki's Pizza's Carnival Halloween pizza features pepperoni, potato salad, sausage 'fingers', fried chicken (hand, arm), bacon (bandage), fresh basil (dead leaves), mozzarella and hash brown potatoes.

## ARRESTING VISUAL EFFECTS

Independent pizza makers are turning to dramatic visual effects to increase interest, fame and sales via Instagram. Many may be fads, but others show potential for growth.


Double-stacks, which draw influencers to New York City's East Village Pizza (pictured), have been replicated in Buffalo, New York and beyond


High rises, cloud crusts, cheese crowns, pepperoni piles, burrata-topped slices, double stacks and stunt pizza these are just a few ways pizzerias are getting attention. Investigate plant-based solutions to crusts and meat toppings that still allow health-conscious and speciality diet-adherent consumers to indulge in this beloved food. Try our Pizza Perfettisisma or Chicago Town ranges that come in a variety of Vegan, dairy free or halal pre topped and base options. In 2017, a $\$ 38$ square which rose in 12 hours resulted in a two-inch tall pizza at New York City's Sofia Pizza Shoppe. Last year, pizza makers in Naples began using Caputo's new Nuvola, a highfibre, high-protein flour that enables faster fermentation and higher hydration. The result, pizza canotto (Italian for a round inflatable raft with a large raised edge), jumped to the US where the style was applied to slices at the newly opened Manero's. In LA, Appolonia's squares feature a tall, crispy cheese edge.

Piles of natural casing pepperoni (often 30 -plus slices) are creating double-takes. Known as ronicups, these pepperoni curl, creating pools of spicy oil that makes the pizza delicious and Instagrammable. This year, Tim Cushman, a James Beard Award-winning sushi chef, pened a Roman-style pizzeria in Boston using the catchy term Mr. Roni Cups.

The limit of what's too much may have been set by New Jersey's Tony Baloney, whose \$80 taco pizza features three tacos per slice. It doesn't stop others from trying. The Philly Taco, a cheesesteak wrapped in a slice, which began as a stunt in 2003, got its own shop, Pizza Da'Action this year


Get creative with vegetables - home-based pizza parlour WALA Pizza Private Dining's Neapolitan-style pizza topped with paprikaspiced San Marzano, buffalo mozzarella, 'nduja cumin seeds and crumbled Parmigiano topped with crispy aubergine skin

## How can you action this?

Experiment with long rises for attention-grabbing height. Add premium toppings to a premium frozen pizza solution such as Instagram-friendly cup-and-char pepperoni.

Why not try combining two staples of Italian cuisine and make a pizza lasagne. Using a deep pizza pan, substitute pasta sheets out for dough to create a delicious cultural monstrosity?

For a great individual pizza option with impact, try serving Chicago Town Deep Dish Pepperoni 5" with cheese added to the edges and cooked in a 5 " baking tin to add an extra cheese crust with height and texture.

Pizza canotto (Italian for a round inflatable raft with a large raised edge), shown here at Salvatore Lioniello's Orta di Atell in Succivo, 30 minutes north of Naples in Italy.

## PIZZAS CATERING TO DIETARY LIFESTYLES

With progress being made year on year for diet-specific foods, pizza is now accessible for the masses and then some.


Dietary requirements are not something to dismiss. Now more than ever, consumers are ncreasingly conscious of what is in their food and how to affects them. It makes sense then for pizza, a food with an infamous lack of concern for your body, to catch up with the times. The Low-carb eaters, gluten-free adherents, and sustainable-minded vegans among us are venturing into the world of alternatives and with a growing consumer base comes a vested interest from product developers.

This runaway success has been powered by UC natural brand, Caulipower, begun by Gail Becker, a former PR exec and a mother of two boys with Coeliac disease. After time consuming experiments with internet recipes for cauliflower crust, she realised there might be a market for pre-made versions. PMQ reports cauliflower-crust pizza rose in popularity by $650 \%$ in 2019 and according to Nielsen, the plant-based product category grew $17 \%$ in 2019.

Spinato's, a direct-to-consumer business in Arizona, uses broccoli for their glutenfree pizzas. There are plenty of other alternatives out there, however. Banza, the masterminds behind chickpea-based pastas and a new competitor in the gluten-free pizza race, have announced that they are entering the frozen crust category with their chickpea crust pizzas, whereas Capello's in Colorado is using almond flour.

Other alternative pizza bases have followed. Canadian company Molinaro's Fine Italian Foods has expanded in the United States with private label zucchini and sweet potato crusts over the past year. They've been joined by Real Good Foods' ketofriendly chicken crusts.

## How can you action this?

Investigate plant-based solutions to crusts and meat toppings that still allow health-conscious and speciality-diet adherent consumers to indulge in this beloved food. Try our Pizza



## SWEET SUCGESS

Who said you can't have pizza for dessert? In fact, sweet pizza has been a



## STON $=8$ ROCK

nutela dessert piza
This delicious dessert plizza, topped with broken chocolate bars, is

When dining out, consumers are looking for elevated experiences and memorable moments, however, dessert options can sometimes be uninspiring and predictable. Make sure you match these expectations by raising the quality of your menu components with inspiring, premium options. With foodies being more inclined to step out of their comfort zone and try exciting dishes, operators need to go out of their way to add intriguing items to their menu.

Some pizzas might be shrinking to target younger, single consumers, but the market is expanding. Connecting to consumers through innovative ingredients, inspiring flavours and interesting textures will keep your menu at the front of the game.

Operators serving brilliant starters and mains are looking for a dessert option to match the calibre of their menu. Dessert menu options can sometimes be uninspiring and predictable. Customers don't always want a full portion for themselves so sharing options are popular. Dessert pizza is a great option for a fun and unique menu item that can be easily flexed to accommodate seasonal specials, dietary requirements and customisation

Try these popular sweet ingredients - chocolate, fruit, ce cream, sweet sauces and coulis, spreads like Nutella drizzled honey or golden syrup, there's plenty of room for experimentation.

## How can you action this?

When it comes to sweet pizza, you don't even need to make a special base. Pizza dough, being neutral in flavour, will lend itself well when topped with sweet flavours of your choosing.

Our range of versatile bases, from dough pucks to pre-rolled bases, in our Pizza Perfettissima range, are both vegan and perfect for unique personalisation.
These versatile products allow you to easily tap into the ever-growing dessert pizza trend, meaning you can give your hungry-for-new customers a real taste of something different.
Why not score extra points with your customers and add a bump of nostalgia to the mix by offering dessert pizza flavours like apple crumble or eton mess that are sure to surprise and delight?

## ALL HEROES NEED A SIDEKICK

Just as dining experiences are better with company, so are pizzas. Providing your customers with sides that compliment and contrast your pizzas can be one the most beneficial things you can do for your business. By increasing your menu, your standout side selection can also help you to win customers over your competitors. Not only this but sides also carry the added benefit a higher spend per head on consumer pizza occasions!

The benefits of sides are never ending. They can boost the nutritional values of the meal as well as making it more shareable and interactive, and they don't only have to be food! Curating a range of delicious drinks, alcoholic and soft, can help to act as palate cleansers and flavour breaks, giving your customers a chance to take a breather from the cheesy indulgency of their main and elevate the flavour profiles of the dining experience

Salads are a fantastic way to add to a meal. Not only do the bright colours act as a contrast to the rest of the meal but they can act as powerful profit boosters. Oi Vita in London offer two sides for the whole of their menu, both of which are salads. Their Mixed Salad is made up of fresh lettuce, radicchio, red cherry tomatoes, and black olives, and their Rocket Salad uses rocket, parmesan shavings and red cherry tomatoes.

If you want to add a little interactivity to your menu, consider offering an anti pasti board. These little nibbles offer a larger variety to dining experiences and can also allow customers to experiment with flavours and even add their own touch to their pizzas. For an extra added touch of showmanship, add a whole burrata to the anti pasti board and let your customers use the creamy center as a dipping sauce for their crusts.

It's no secret that pizza is a thirsty sport. Chewy doughs, copious amounts of cheese, and salty toppings come together create a delicious cuisine that is sure to make you parched. Serving a refined and curated selection of drinks can help footfall in your business by showing customers that you are going the extra mile when thinking of flavours and overall experience. Sodo Pizza in London serve natural wines which fall under 4 categories, "Easy", "Funky", "Classic", and "Juice", each with their own unique offering to the meal.


It's a shame, but not everyone agrees that the crusts are the best part of the pizza. For these people, it's probably a good idea to serve "crust enhancers" A.K.A. dips. Experiment with flavoured mayonnaises like garlic, basil, truffle, or even nduja. London based Homeslice make their own truffle soy glaze, truffle crème fraiche, and jalapeno salsa to accompany their crusts.

## How can you action this?

Our Pizza Perfettissima Puro Base is the perfect canvas for all of your ideas. Drizzle over melted butter, minced garlic and rosemary before baking to create a delicious garlic bread or bake it and top with chopped tomatoes, fresh basi and balsamic glaze to create a twist on classic bruschetta.


