

Pizza - US - 2022

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Sales and market share trends for retail pizza
- A comparison of occasions across different types of pizza
- Motivations for using frozen/refrigerated pizza
- Pizza shopping behaviors
- Interest in pizza concepts

The retail pizza category is easing back from the huge spike it experienced at the height of the pandemic, but the category's reputation as a convenient, cost-effective and tasty meal option positions it well for growth, especially as consumers manage their food budgets amid rising prices.

The category's most leverageable asset may be its versatility. There's room to enhance retail pizza's image both as an indulgent treat and as a healthy meal option. Innovation in both these directions will help the category attract more users and capture new use occasions.

Consumers tend to acknowledge improvement in the taste of retail pizza over the past few years, but there's room for further improvement. More than three quarters of retail pizza consumers agree that delivery pizza tastes better, suggesting that delivery is still a key yardstick for retail pizza quality.



"Retail pizza's well-established reputation as convenient and cost-effective provides a solid base, but the category's most leverageable asset may be its versatility. There's room to enhance retail pizza's image as an indulgent treat and as a healthy meal option. Innovation in these directions will help the category attract users and capture new use occasions."

– **John Owen, Associate Director – Food and Retail**

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **This Report looks at the following areas**
- **Definition**
- **Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Total US sales and fan chart forecast of pizza, at current prices, 2017-27
Figure 2: Pizza category outlook, 2022-27
- **Opportunities and challenges**
- **Opportunity to expand frozen pizza consumption at breakfast and lunch**
Figure 3: Frozen pizza meal and snack occasions, 2022
- **Give store-bought pizza some of the festiveness of restaurant-bought and homemade**
Figure 4: Pizza occasions, by pizza type, 2022
- **Enhance cravability in smaller households with flavor and variety**
Figure 5: Pizza motivations, by household size, 2022
- **Better-for-you claims could help drive usage among older adults**
Figure 6: Interest in health-related pizza concepts, by age, 2022
- **Key consumer insights**
- **Nearly three quarters of households purchase store-bought pizza**
- **Young frozen pizza eaters open to a wider array of meal and snack occasions**
- **Category defined by convenience and value**
- **Contending with the routine**
- **When it comes to toppings, more is often better**
- **Improvement noted, but perceptions still lag delivery**

MARKET SIZE AND FORECAST

- **Pandemic and inflation distort long-term slow growth trend**
Figure 7: Total US sales and fan chart forecast of pizza, at current prices, 2017-27
Figure 8: Total US sales and forecast of pizza, at current prices, 2017-27

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

SEGMENT PERFORMANCE

- **Frozen pizza drives overall category trends**
- **Smaller segments see mixed results**

Figure 9: Total US retail sales and forecast of pizza, by segment, at current prices, 2017-27

MARKET FACTORS

- **Retail pizza could be viewed as affordable option amid rising food prices**

Figure 10: Changes in consumer price indexes for food, 2020-23

- **A third of US workers work entirely/mostly from home**

Figure 11: Work location, 2022

Figure 12: Cooking frequency – Method, by work location, 2022

MARKET SHARE/KEY PLAYERS

- **Nestlé loses share as category grows more competitive, diverse**
- **Smaller premium brands make gains**
- **Sales of pizza by company**

Figure 13: Multi-outlet sales of pizza, by leading companies, rolling 52 weeks 2021 and 2022

Figure 14: Multi-outlet sales of frozen pizza, by leading companies and brands, rolling 52 weeks 2021 and 2022

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Make pizza a retail destination**

Figure 15: Aldi refrigerated pizza examples

THE PIZZA CONSUMER – FAST FACTS

- **Three quarters of households use retail pizza**
- **Dinner the most common occasion**
- **Convenience and value define the category**
- **Retail pizza shopping and consumption are largely a matter of routine**
- **When it comes to toppings, more is often better**
- **Taste perceptions still lag delivery**

HOUSEHOLD PIZZA CONSUMPTION

- **Nearly three quarters of households purchase store-bought pizza**

Figure 16: Household pizza consumption, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Store-bought and homemade skew to young adults and families**
 Figure 17: Household pizza consumption, by age, 2022
- Bigger households eat more pizza**
 Figure 18: Household pizza consumption, by household size, 2022
- Ready-to-eat and refrigerated skew most strongly to young adults**
 Figure 19: Household consumption of store-bought pizza types, by age, 2022

PIZZA OCCASIONS

- Opportunity to expand frozen pizza consumption at breakfast and lunch**
 Figure 20: Pizza occasions, by pizza type, 2022
- Store-bought pizza could use some of the festiveness of restaurant-bought and homemade**
 Figure 21: Frozen pizza dayparts, by age, 2022

PIZZA MOTIVATIONS

- Category defined by convenience and value**
 Figure 22: Pizza motivations, 2022
- Enhance cravability in smaller households with flavor and variety**
 Figure 23: Pizza motivations, by household size, 2022

PIZZA SHOPPING BEHAVIORS

- Contending with the routine**
 Figure 24: Pizza shopping behaviors, by age, 2022

INTEREST IN PIZZA CONCEPTS

- When it comes to toppings, more is often better**
 Figure 25: Interest in pizza concepts, 2022
- Younger adults choosier about toppings**
- Better-for-you claims could help drive usage among older adults**
 Figure 26: Interest in pizza concepts, by age, 2022

ATTITUDES TOWARD PIZZA

- It's all about the crust**
- Improvement noted, but perceptions still lag delivery**
 Figure 27: Attitudes toward pizza, 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Unique toppings, customization appeal to younger adults**

Figure 28: Attitudes toward pizza, by age, 2022

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**
- **Terms**

APPENDIX – THE MARKET

- Figure 29: Total US retail sales and forecast of pizza, at inflation-adjusted prices, 2017-27
- Figure 30: Total US retail sales and forecast of frozen pizza, at current prices, 2017-27
- Figure 31: Total US retail sales and forecast of frozen pizza, at inflation-adjusted prices, 2017-27
- Figure 32: Total US retail sales and forecast of refrigerated take-and-bake pizzas, at current prices, 2017-27
- Figure 33: Total US retail sales and forecast of refrigerated take-and-bake pizzas, at inflation-adjusted prices, 2017-27
- Figure 34: Total US retail sales and forecast of pizza kits/components, at current prices, 2017-27
- Figure 35: Total US retail sales and forecast of pizza kits/components, at inflation-adjusted prices, 2017-27
- Figure 36: Total US retail sales of pizza, by channel, at current prices, 2017-22

APPENDIX – COMPANIES AND BRANDS

- Figure 37: Multi-outlet sales of frozen pizza, by leading companies and brands, rolling 52 weeks 2021 and 2022
- Figure 38: Multi-outlet sales of pizza kits/components, by leading companies and brands, rolling 52 weeks 2021 and 2022

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.