

# Pizzas and Pies: Inc Impact of COVID-19 - UK - December 2020

Report Price: £2195 | \$2995 | €2600

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:

- The impact of COVID-19 on sales of pizzas and savoury pastries, and consumer behaviours.
- Frequency of eating different types of pizza, and types of savoury pastries eaten.
- Attributes worth paying more for when buying pizza and those most looked for when buying savoury pies/pastries.
- New launch activity in pizzas and savoury pastries, and perceptions and usage of the brands in these categories.
- Behaviours related to eating and buying pizzas and pies.

When it comes to what consumers want most a focus on lots of filling in pies/pastries or lots of toppings in pizza will add the most value to these products, given that 50% of buyers look for the former and 43% of buyers of pizza are prepared to pay more for the latter. It is these attributes therefore that are most likely to justify a price premium for brands.

More meals and snacks being eaten at home during the COVID-pandemic boosted retail sales of pizzas and pies, resulting in a near 12% increase in retail sales of pizza to nearly £1.27 billion and an 11% increase in sales of savoury pastries to £1.26 billion in 2020. As well as more home working, the loss of dining out opportunities during lockdowns and hesitance towards foodservice contributed to the growth. The new wave of lockdowns starting in 2021 will further support sales.

Showing the importance of supermarkets replicating what is available from pizzas in takeaway/home delivery, 43% of eaters and buyers of supermarket pizza prefer to buy the latter over the supermarket offerings. As well as launching 'Takeaway-style' ranges, pizza meal deals will be important to holding on to some of the gains made during the COVID-19 pandemic.



“More meals and snacks being eaten at home during the COVID-19 pandemic boosted retail sales of both pizza and savoury pastries during 2020. The income squeeze in 2021 and the enduring rise in home working longer term will continue to benefit the category, although consumer interest in healthy eating will limit growth.”

– Richard Caines, Senior Food & Drink Analyst

## Buy this report now

Visit [store.mintel.com](https://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

## Pizzas and Pies: Inc Impact of COVID-19 - UK - December 2020



Report Price: £2195 | \$2995 | €2600

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

How healthy pizza is, is only prioritised by 26% of buyers. That pizza is a treat for most plays a role in the limited interest in healthy options. Better-for-you toppings are the most promising way for pizza brands to tap into interest in healthy eating. That these spark more interest than low-calorie options echoes the keen demand for generous offerings from pizzas.

### 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](https://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: £2195 | \$2995 | €2600

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

## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- COVID-19: Market context
- Impact of the January lockdowns and the vaccination rollout
- Economic and other assumptions
- Products covered in this Report

### EXECUTIVE SUMMARY

- **Boost to pizzas and pies from more eating at home during COVID-19**

Figure 1: Short-, medium- and long-term impact of COVID-19 on pizzas and savoury pastries, 12 January 2021

- **The market**
- **Big increase in 2020 sales of pizza during COVID-19**  
Figure 2: Forecast of UK retail value sales of chilled and frozen pizza, 2015-25 (prepared 14 December 2020)
- **At-home meals during COVID-19 boost savoury pastries**  
Figure 3: Forecast of UK retail value sales of chilled and frozen savoury pies and other savoury pastry products, 2015-25 (prepared 14 December 2020)
- **COVID-19 increases spotlight on health**
- **Supermarket pizza competes with takeaway/home delivery pizza**
- **Decline projected in some core younger eaters of pizza**
- **Companies and brands**
- **Chilled pizza dominated by own-label**
- **Own-label sees the strongest boost in frozen pizza**  
Figure 4: Leading brands' sales in the frozen pizza market, by value, 2019/20\*
- **Ginsters number one in chilled savoury pastries**  
Figure 5: Leading brands' sales in the chilled savoury pies and pastries market, by value, 2019/20\*
- **Own-label enjoys most of growth in frozen savoury pastries**
- **Growth in vegan claims in pizza**
- **Retail pizzas continue their efforts to replicate the takeaway experience**
- **Vegan claims rise in savoury pastries over 2018-20**
- **Growth in premium launches in pies/pastries**
- **Dr Oetker remains the top advertiser in pizza, supporting Chicago Town**
- **Ginsters returns to TV, pushing Cornish heritage**

### 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](https://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: £2195 | \$2995 | €2600

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

- **The consumer**
- **More than eight in 10 people eat pizza**  
Figure 6: Frequency of eating pizza in the last 3 months, September 2020
- **Lots of toppings adds most value to supermarket pizza**  
Figure 7: Attributes buyers would pay more for when buying pizza from a supermarket, September 2020
- **Taste and price most important purchase drivers**  
Figure 8: Factors influencing choice of pizza, September 2020
- **More choice of toppings would increase demand**  
Figure 9: Behaviours relating to eating and buying pizza, September 2020
- **Eight in 10 people eat savoury pies or other pastries**  
Figure 10: Usage of different types of pies and savoury pastry products, September 2020
- **Lots of filling most sought attribute of a pie/pasty**  
Figure 11: Attributes looked for when buying pies and pasties, September 2020
- **Pies/pastries influenced by world cuisines an opportunity**  
Figure 12: Behaviours related to eating and buying pies, September 2020

**ISSUES AND INSIGHTS**

- **Competing with takeaway/home delivery crucial to continued growth**
- **Replicating takeaway/home delivery important**
- **Lots of toppings adds most value to supermarket pizza**
- **Pizzas for sharing preferred to individual pizzas**
- **Half interested in fresh supermarket pizza delivered**
- **Demand for both traditional recipes and world cuisines needs to be explored in pies/pasties**
- **Traditional recipes have more appeal than new ones**
- **But pies/pastries influenced by world cuisines still an opportunity**
- **Offering healthier choices important to future sales of pizzas and pies**
- **A quarter prioritise health when choosing pizza**
- **Better-for-you pizza toppings spark widespread interest**
- **Healthier pies/pasties would encourage more eating**
- **Vegetarian and vegan products offer more opportunities**
- **Plant-based pizzas have strong appeal**
- **Vegetarian/vegan of significant importance in pies/pasties**

**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.

**THE MARKET – KEY TAKEAWAYS**

- **Big increase in 2020 sales of pizza during COVID-19**
- **Only some of the sales gains in pizza will be lost in 2021**
- **At-home meals during COVID-19 boost for savoury pastries**
- **Income squeeze will benefit savoury pastry sales**
- **COVID-19 increases spotlight on health**
- **Supermarket pizza competes with takeaway/home delivery pizza**
- **Decline projected in some core younger eaters of pizza**

**MARKET SIZE AND FORECAST**

- **Boost to pizzas and pies from more eating at home during COVID-19**

Figure 13: Short-, medium- and long-term impact of COVID-19 on pizzas and savoury pastries, 12 January 2021

- **Big increase in 2020 sales of pizza**

Figure 14: Total UK retail value and volume sales of chilled and frozen pizza, 2015-25 (prepared 14 December 2020)  
 Figure 15: Forecast of UK retail value sales of chilled and frozen pizza, 2015-25 (prepared 14 December 2020)

- **At-home meals boost for savoury pastries**

Figure 16: Total UK retail value and volume sales of chilled and frozen savoury pies and other savoury pastry products, 2015-25 (prepared 14 December 2020)  
 Figure 17: Forecast of UK retail value sales of chilled and frozen savoury pies and other savoury pastry products, 2015-25 (prepared 14 December 2020)

- **Market drivers and assumptions**

Figure 18: Key drivers affecting Mintel’s market forecast, 2015-25 (prepared 25 November 2020)

- **Learnings from the last recession**

Figure 19: Growth in value and volume retail sales of pizza, 2009-13

- **Forecast methodology**

**MARKET SEGMENTATION**

- **Frozen pizza sees the strongest value growth**

Figure 20: UK retail value and volume sales of chilled and frozen pizza, by segment, 2015-20

- **Frozen pastries’ growth outstrips that of chilled**

Figure 21: Total UK retail value and volume sales of savoury pies and pastries, by chilled and frozen, 2015-20

- **Pies the biggest segment of savoury pastries**

**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: £2195 | \$2995 | €2600

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

Figure 22: Total UK retail value and volume sales of savoury pies and pastries, by sub-segment, 2018-20

**MARKET DRIVERS**

- 2021 lockdowns will support more eating at home
- Strong interest in healthy eating
- COVID-19 increases spotlight on health
- Government emphasis on health intensifies under COVID-19
- Supermarket pizza competes with takeaway/home delivery pizza

Figure 23: Any ordering of takeaway/home delivery from a pizza/Italian venue since the start of the COVID-19/ coronavirus outbreak, by age, July 2020

- Making pizza and pies from scratch the other side of competition
- Plant-based trend influencing pizzas and pies
- Decline projected in some core younger eaters of pizza

Figure 24: Trends in the age structure of the UK population, 2015-25

- Income squeeze will hit discretionary spend
- Brexit trade deal will mean minimal impact on price of pizzas and pies

**COMPANIES AND BRANDS – KEY TAKEAWAYS**

- Chilled pizza dominated by own-label
- Ginsters number one in chilled savoury pastries
- Private label dominates pizza launch activity in 2020
- Growth in vegan claims in pizza
- Retail pizzas continue their efforts to replicate the takeaway experience
- International flavours can help to keep consumers engaged
- Vegan claims rise in savoury pastries over 2018-20
- Growth in premium launches in pies/pastries
- Dr Oetker remains the top advertiser in pizza, supporting Chicago Town

**MARKET SHARE**

- Chilled pizza dominated by own-label  
 Figure 25: Leading brands’ sales in the chilled pizza market, by value and volume, 2018/19 and 2019/20
- Own-label sees the strongest boost in frozen pizza  
 Figure 26: Leading brands’ sales in the frozen pizza market, by value and volume, 2018/19 and 2019/20
- Ginsters number one in chilled savoury pastries

**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: £2195 | \$2995 | €2600

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

Figure 27: Leading brands' sales in the chilled savoury pies and pastries market, by value and volume, 2018/19 and 2019/20

- **Own-label enjoys most of growth in frozen savoury pastries**

Figure 28: Leading brands' sales in the frozen savoury pies and pastries market, by value and volume, 2018/19 and 2019/20

### LAUNCH ACTIVITY AND INNOVATION

- **Pizzas**

- **Private label dominates launch activity in 2020**

Figure 29: New product launches in the UK retail pizza market, by private label and brands, 2015-20

Figure 30: Share of new product launches in the UK retail pizza market, by top ten companies, 2015-20

- **Health claims are rare in the pizza category**

Figure 31: Share of new product launches in the UK retail pizza market, by health claims, 2015-20 (sorted by 2019)

Figure 32: One Planet Pizza Three Cheezly Margherita, 2020

Figure 33: Examples of single-serve, calorie-controlled pizza launches, 2019-20

- **Growth in vegan claims in 2019**

Figure 34: Share of new product launches in the UK retail pizza market with vegetarian/vegan claims, 2015-20

Figure 35: Examples of vegan pizza launches, 2020

- **Growth in premium claims over 2015-19**

Figure 36: Share of new product launches in the UK retail pizza market with premium claims, 2015-20

Figure 37: Examples of own-label premium sourdough pizza launches, 2020

Figure 38: Examples of pizzas in the Gino D'Acampo range, 2019

- **Retail pizzas continue their efforts to replicate the takeaway experience**

Figure 39: Goodfellas combines two popular fast foods with its Cheeseburger Pizza, 2020

Figure 40: Tesco Takeaway Stuffed Crust Cheese Pizza – before and After

Figure 41: Examples of stuffed-crust pizza launches by Iceland, 2020

- **International flavours can help to keep consumers engaged**

Figure 42: Examples of pizza launches featuring international flavours, 2020

### 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](https://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: £2195 | \$2995 | €2600

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

- Pies and savoury pastry products**
- Private label extends its lead on launches in 2020**  
 Figure 43: New product launches in the UK pies and savoury pastry products market, by private label and brands, 2015-20  
 Figure 44: Share of new product launches in the UK pies and savoury pastry products market, by top ten companies, 2015-20
- Healthier variants are underexplored in pies**  
 Figure 45: Share of new product launches in the UK pies and savoury pastry products market, by health claims, 2015-20 (sorted by 2019)  
 Figure 46: Wyke Farms Deep Fill Mature Cheddar Cheese & Onion Pies, 2020
- Vegan claims rise over 2018-20**  
 Figure 47: Share of new product launches in the UK pies and savoury pastry products market with vegetarian/vegan claims, 2015-20  
 Figure 48: Examples of vegan pie/savoury pastry product launches, 2020  
 Figure 49: Examples of vegan sausage roll launches, 2020
- Growth in premium launches in 2019**  
 Figure 50: Share of new product launches in the UK retail pies and savoury pastry products market with premium claims, 2015-20  
 Figure 51: Examples of premium own-label savoury pastry products launches, 2020
- Pie makers link up with beer brands**
- A few brands explore international flavours**  
 Figure 52: Savoury pastry products launches with international flavours, 2020
- Sustainable packaging is underexplored in both pizzas and pies**  
 Figure 53: Examples of pizza and pie launches with environmentally-friendly packaging, 2019-20

**ADVERTISING AND MARKETING ACTIVITY**

- Advertising spend on pizzas declines in 2020**  
 Figure 54: Total above-the line, online display and direct mail advertising expenditure on pizza, 2016/20
- Dr Oetker remains the top spender, supporting masterbrand Chicago Town...**
- ...and spends on Ristorante**

**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: £2195 | \$2995 | €2600

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

Figure 55: Total above-the line, online display and direct mail advertising expenditure on pizza, by top advertisers, 2019-20

- **Nomad’s Goodfella’s spotlights gangster associations**
- **PizzaExpress launches The Hunt to win £55,000**
- **Pies also see decline in spend**

Figure 56: Total above-the line, online display and direct mail advertising expenditure on pies, 2016/20

- **Ginsters returns to TV, pushing Cornish heritage**

Figure 57: Total above-the line, online display and direct mail advertising expenditure on pies, by top advertisers, 2019-20

- **Pukka Pies positions itself as the People’s Pie**
- **Nielsen Ad Intel coverage**

**BRAND RESEARCH**

- **Brand map**

Figure 58: Attitudes towards and usage of selected brands, November 2020

- **Key brand metrics**

Figure 59: Key metrics for selected brands, November 2020

- **Brand attitudes: Higgidy seen as most innovative brand**

Figure 60: Attitudes, by brand, November 2020

- **Brand personality: Chicago Town more fun than other brands**

Figure 61: Brand personality – macro image, November 2020

- **Ginsters stands out as being seen as the most traditional brand**

Figure 62: Brand personality – micro image, November 2020

- **Brand analysis**

- **Chicago Town seen as most delicious brand**

Figure 63: User profile of Chicago Town, November 2020

- **Higgidy stands out as the most innovative brand**

Figure 64: User profile of Higgidy, November 2020

- **Goodfella’s strongly associated with being a family brand**

Figure 65: User profile of Goodfella’s, November 2020

- **Pukka Pies seen as the most comforting brand**

Figure 66: User profile of Pukka Pies, November 2020

- **Dr. Oetker Ristorante less seen as a family brand**

Figure 67: User profile of Dr. Oetker Ristorante, November 2020

- **Ginsters beats other brands on being seen as traditional**

Figure 68: User profile of Ginsters, November 2020

**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](https://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: £2195 | \$2995 | €2600

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

THE CONSUMER – KEY TAKEAWAYS

- More than eight in 10 people eat pizza
- Lots of toppings adds most value to supermarket pizza
- A third of buyers prepared to pay more for premium ingredients
- A quarter prioritise health when choosing pizza
- More choice of toppings would increase demand
- Eight in 10 people eat savoury pies or other pastries
- Lots of filling most sought attribute of a pie/pasty
- Pies/pastries influenced by world cuisines an opportunity

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- People eat at home more during COVID-19
- More remote working and eating at home expected long term  
 Figure 69: Concerns about going to restaurants/bars indoors, 25 June-19 November 2020
- A quarter expect to spend less on takeaway/home delivery in November 2020  
 Figure 70: Expected changes to spending on takeaways/home delivery and dining out over the next month, November 2020
- More meals shared with friends/family during COVID-19  
 Figure 71: Incidence of eating with family/other members of your household, by age, 23 April-7 May 2020
- More cooking from scratch but room for convenient options  
 Figure 72: Changes to cooking from scratch (ie using/preparing meals with raw ingredients) since the start of the COVID-19 outbreak, by age, 23 April-7 May 2020
- Pandemic increases focus on health
- A quarter prioritise health in pizza but more want healthier options  
 Figure 73: Changes in eating healthily as a priority since the COVID-19 outbreak, by gender and age, 2-11 November 2020
- COVID-19 expected to further boost flexitarian and plant-based trends  
 Figure 74: 'The COVID-19/coronavirus outbreak has made a vegan diet more appealing', by age, 23 April-7 May 2020

USAGE OF PIZZA

- More than eight in 10 people eat pizza  
 Figure 75: Any eating of pizza in the last 3 months, by type, September 2020

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: £2195 | \$2995 | €2600

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

- **Younger and family bias to eating of all types of pizza**

Figure 76: Frequency of eating pizza in the last 3 months, September 2020

#### ATTRIBUTES WORTH PAYING MORE FOR

- **Lots of toppings adds most value to supermarket pizza**

Figure 77: Attributes buyers would pay more for when buying pizza from a supermarket, September 2020

- **A third will pay more for stuffed crust**
- **A third of buyers prepared to pay more for premium ingredients**

#### FACTORS INFLUENCING CHOICE OF PIZZA

- **Taste and price most important purchase drivers**

Figure 78: Factors influencing choice of pizza, September 2020

- **A quarter prioritise health when choosing pizza**
- **Better-for-you toppings spark widespread interest**

#### BEHAVIOURS RELATED TO EATING AND BUYING PIZZA

- **More choice of toppings would increase demand**

Figure 79: Behaviours relating to eating and buying pizza, September 2020

- **Vegetarian and vegan pizzas offer more opportunities**
- **Pizzas for sharing preferred to individual pizzas**

#### USAGE OF PIES

- **Eight in ten people eat savoury pies or other pastries**

Figure 80: Number of different types of savoury pastry products eaten, September 2020

- **Sausage/other rolls most eaten savoury pastry product**

Figure 81: Usage of different types of pies and savoury pastry products, September 2020

- **Eating of pasties and pork pies shows male bias**
- **16-24 year olds less interested in savoury pies and quiche**

#### WHAT PEOPLE LOOK FOR WHEN BUYING PIES OR PASTIES

- **Lots of filling most sought attribute of a pie/pasty**

Figure 82: Attributes looked for when buying pies and pasties, September 2020

- **Traditional recipes have more appeal than new ones**
- **Vegetarian/vegan of smaller but significant importance**

#### 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](https://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.

### BEHAVIOURS RELATED TO EATING AND BUYING PIES

- **Pies/pastries influenced by world cuisines an opportunity**  
Figure 83: Behaviours related to eating and buying pies, September 2020
- **Better-for-you pies/pastries would encourage more eating**
- **Locally-produced home delivered products have appeal**

### APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

### APPENDIX – MARKET SHARE

Figure 84: Leading manufacturers’ sales in the chilled pizza market, by value and volume, 2018/19 and 2019/20

Figure 85: Leading manufacturers’ sales in the frozen pizza market, by value and volume, 2018/19 and 2019/20

Figure 86: Leading manufacturers’ sales in the chilled savoury pies and pastries market, by value and volume, 2018/19 and 2019/20

Figure 87: Leading manufacturers’ sales in the frozen savoury pies and pastries market, by value and volume, 2018/19 and 2019/20

### APPENDIX – LAUNCH ACTIVITY AND INNOVATION

Figure 88: Share of new product launches in the UK retail pizza market, by storage, 2015–20

Figure 89: Share of new product launches in the UK retail savoury pastries market, by storage, 2015–20

### APPENDIX - ADVERTISING AND MARKETING ACTIVITY

Figure 90: Total above-the line, online display and direct mail advertising expenditure on pizza, by top brands, 2019–20

Figure 91: Total above-the line, online display and direct mail advertising expenditure on pies, by top brands, 2019–20

### 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)**.