



The Outlook and Opportunity for Pizza in Foodservice

A comprehensive review of pizza and pizza components in the away-from-home channel

➤ Study Background & Objectives

Any way you slice it, Americans love their pizza—to the tune of nearly \$37 billion in annual sales, according to PMQ’s annual pizza report. But the industry that once thrived on phone delivery is evolving. There are a number of reasons manufacturers should refine entry and growth strategies for this “Americana” category, including back-of-house innovations (e.g., the emergence of fast-casual pizza chains that are capitalizing on real-time preparation with new equipment); ubiquitous menu premiumization (e.g., Pizza Hut’s massive menu overhaul with six new sauces, 10 new crust flavors, and an abundance of newly introduced premium toppings); and the critical importance of mobile/online ordering (which is penetrating even non-traditional foodservice segments like education, health care, and lodging). Our multiclient study will provide a comprehensive evaluation of the away-from-home pizza category, helping sponsors drive sustained growth in this dynamic channel. Engagement objectives include:

- Assess the foodservice pizza and related product categories in terms of current size (manufacturer shipment dollars), segmentation, and formats.
- Determine how the business has changed over the past five years and examine the future outlook for each category/sub-category.
- Examine the competitive landscape, including an evaluation and share estimation of key competitors active in both pizza and related products.
- Establish critical success factors and develop custom recommendations, helping each study sponsor identify, prioritize and capitalize on growth opportunities.

➤ Methodology & Scope

- **TREND IDENTIFICATION** through a thorough review of public information and nonproprietary research.
- **IN-DEPTH INTERVIEWS** with **500 chain and independent operators**, as well as **distributors** (broadline, specialty, and buying-group headquarters) to glean key volumetric data, trends and insights.
- **SCOPE** includes analysis of frozen prepared pizza, as well as related pizza products (e.g., doughballs, sheeted dough, par-baked dough, pizza made from scratch, vegetable toppings, protein toppings, sauces, and processed tomato products).

➤ Deliverables

- **PowerPoint report** with extensive metrics, analysis and expert insights.
- Easy-to-digest commentary with **key takeaways and actionable recommendations**.
- Robust appendix with **full study data** from questions and responses.

➤ Next Steps

To sponsor the study and have your proprietary questions included in our research, please complete the acceptance form on the following page or contact Tim Powell at 312.602.9899 (tpowell@q1consultingllc.com).



Purchase Agreement

The Outlook and Opportunity for Pizza in Foodservice

- YES, I'd like to sponsor the study and have my proprietary input included in the research for a fee of \$11,500.

ACCEPTANCE

Name _____

Title _____

Company _____

Phone _____

Fax _____

Email _____

Signed _____

Date _____

Note: Q1 Consulting terms require 50% payment due upon acceptance.

Once approved, please sign, scan and email to the attention of Tim Powell at tpowell@q1consultingllc.com. Thank you for your business!