# 

Faced with familiar challenges, independents keep learning to win—on their own terms, with creativity and technology on their side.

BY RICK HYNUM, CHARLIE POGACAR and KEVIN MCINTYRE

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**HEN FRAN GARCIA FIRST DECIDED TO OPEN** his own pizzeria—the celebrated Artichoke Basille's Pizza in New York City-in 2008, he got some unexpected advice from a fellow restaurateur: Don't do it. And, mind you, that restaurateur was his own mother. "She said, 'The rent is too high. There's a friggin' pizza place on every corner. They're gonna chew you up and spit you out," Garcia recalled in a recent interview on Peel: A PMQ Pizza Podcast.

Garcia was just another pizza guy, making artichoke pies at his mom's Staten Island restaurant and giving slices away for free to get customers hooked. But he and his cousin, Sal Basille, had bigger dreams. Yes, there was pizza aplenty in New York, Garcia told his mother. But his was better. "I said, 'That pizza sucks. I'm going to sell more pizza than anybody. We're going to be famous."

Garcia and Basille went on to star in The Cooking Channel's Pizza Masters and Pizza Cuz while steering Artichoke Basille's to countless accolades and 13 locations in New York, New Jersey and California. "One thing I learned about business," Garcia said, "is don't [expletive] listen to anybody."

That might be an overstatement, but take it in the spirit in which it's intended. Every year, the pizza industry brings new challenges; 2024 was no exception, and the same will go for 2025. Yet the industry keeps thriving because pizzeria operators keep rising to the occasion, because pizza itself is

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both trend-resistant and adaptable to new trends and it never gets boring. According to Datassential's Pizza Keynote Report, released in October, 66% of consumers reported eating a pie within the last week, and 87% said they're eating more or the same

With demand like that, Garcia's right: Don't let anyone tell you there's too much pizza out there. Looking back at 2024 shows us that the field is still wide open—perhaps more than ever—for pizzeria owners and pizza chefs with ambition, drive and creativity. Granted, an IBISWorld report, released in September, found that pizza restaurant revenue has been falling at a CAGR of 2.4% over the past five years. However, the report estimates a 1.4% increase in 2024, which should see overall revenue reaching \$50.1 billion.

amount of pizza as last year.

"Competition is fierce, as opening a new pizza restaurant is fairly inexpensive, and demand for pizza is somewhat evergreen," IBISWorld notes. "Successful restaurants must ensure they carve a niche for themselves in the crowded market."

To do that in 2025, you might have to learn a new trick or two (nationwide shipping, for example, and better employee interviewing skills). And running



"I continue to believe that we will deliver U.S. same-store sales growth of 3% or more annually. And that's why I expect Domino's to continue to drive additional market share gain."

RUSSELL WEINER, DOMINO'S

your pizzeria will still demand constant adaptation, quick problem solving, and a mastery of both the art of pizza making and the cold, hard calculus of business management.

The major chains, after all, still have a leg up on independents. They're vying for the same pizza dollar that keeps the lights on at your place. And, as we saw this year, they will do whatever it takes to pull business away from you. So let's start there with the so-called pizza wars of 2024.

### LEADING INTO VALUE

Despite a fairly robust economy overall, many American diners still had the inflation jitters and couldn't be persuaded to loosen their wallets this year. Domino's, the world's top pizza chain, saw that coming and had a plan in place called Hungry for MORE. And to hear CEO Russell Weiner talk about it in a third-quarter earnings call on October 10, that plan worked like a charm.

Weiner said the company launched Hungry for MORE in December 2023, fully expecting that "consumer spending would be pressured in 2024 and that the QSRs that offered the strongest value would win. That proved to be right, and...leaning into our strategic pillar of renowned value has been key to our success in 2024, especially in the U.S."

Never mind the "burger wars," Weiner added. "I think we're in the pizza wars right now, and, again, clearly we are winning that." To keep up, he added, other pizza companies will have to "continue to lean into value."



# **2025 TRENDING STYLES**

кпош іт	TRIED IT	LOVE IT	HEAT SCORE	
+9%	+6%	+2%	ON FIRE!	
+7%	+2%	+2%	ON FIRE!	
+5%	+4%	+3%	ON FIRE!	
+5%	+5%	+1%	ON FIRE!	
+5%	+1%	UNCHANGED	ON FIRE!	
+5%	+1%	+1%	ON FIRE!	
+4%	+3%	+4%	GAINING FAST	
+4%	+2%	+1%	GAINING FAST	
+4%	UNCHANGED	UNCHANGED	GAINING FAST	
+4%	+4%	+3%	GAINING FAST	
	+9% +7% +5% +5% +5% +4% +4%	+9% +6%  +7% +2%  +5% +4%  +5% +5%  +5% +1%  +5% +1%  +4% +3%  +4% +2%  +4% UNCHANGED	+9% +6% +2% +2% +2% +2% +2% +4% +3% +4% +1% UNCHANGED +1% +1% +1% +4% +2% +1% +1% +4% +2% +1% UNCHANGED UNCHANGED UNCHANGED	KNOW IT         TRIED IT         LOVE IT         HEAT SCORE           +9%         +6%         +2%         On FIRE!           +7%         +2%         +2%         On FIRE!           +5%         +4%         +3%         On FIRE!           +5%         +1%         On FIRE!           +5%         +1%         UNCHANGED         On FIRE!           +5%         +1%         +1%         GAINING FAST           +4%         +2%         +1%         GAINING FAST           +4%         UNCHANGED         UNCHANGED         GAINING FAST

Source: Datassential

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### **2025 TOP PIZZA INGREDIENTS**

Based on Total Percentage of Restaurant Saturation | Source: Datassential

onion	<b>75.6</b> %		
PEPPERONI	<b>73.3</b> %		
MOZZARELLA	<b>73.1</b> %		
томато	<b>71.6</b> %		
SAUSAGE	<b>69.4</b> %		
MUSHROOM	<b>69</b> %		
CHICKEN	<b>64.9</b> %		
PEPPERS	<b>62.8</b> %		
BACON	<b>58</b> %		
BASIL	<b>55.5</b> %		

Just a week into October, Domino's resurrected its Emergency Pizza plan; with a qualifying digital-only order of \$7.99, Domino's Rewards members received an offer for a free medium two-topping pizza to redeem whenever they needed it most. And that was just the latest value offer from the chain. It started in late January with a weeklong digital-only special featuring large two-topping pizzas for \$6.99 each, a deal that resurfaced as a carryout offer in mid-August. In March, June and October, Domino's marked down all menu-priced pizzas by 50% for a week.

We could go on and on—there were other deals from Domino's, too—but suffice it to say that the chain has seen four straight quarters of same-store sales growth since Hungry for MORE's debut.

Other pizza chains fought the value wars with less fervor. In August, Donatos debuted its Bakery Crust Pizza—thicker and cut into squares—aimed at budget-conscious families. That same month, Cicis Pizza rolled out a three-month all-you-caneat buffet deal on Mondays and Tuesdays for \$4.99. Take-and-bake leader Papa Murphy's joined the fray in September, introducing the Everyday Value menu with three large pizzas starting at \$7.99 apiece. And MOD Pizza, after flirting briefly with bankruptcy and getting acquired by Elite Restaurant Group,



Domino's partnered with nail brand Olive & June for its Emergency Pizza offer in October.

came out with its Unlimited Toppings, One Price menu structure.

Of course, the QSR value wars extended to all fronts, not just pizza—from Taco Bell's new Craving Values menu to McDonald's \$5 value meal and Burger King's \$5 Duo deal. But, aside from Domino's, there were few clear winners overall. According to an October report from Black Box Intelligence, quick-service restaurants, despite all of these deals, saw a decline of 2.2% in same-store traffic in June, 3.4% in July, 4% in August and 2.5% in September, not to mention a drop in same-stores sales in June and July, although those sales went up by 0.8% in September.

### 2025 FASTEST-GROWING PIZZA INGREDIENTS

Based on 4-year growth | Source: Datassential

\*(Denotes exponential growth)

PLANT-BASED PEPPERONI	<b>∞</b> *
HOT HONEY	+430%
PEPPERONI CUPS	+ <b>406</b> %
COTIJA	<b>+163</b> %
TANDOORI	<b>+153</b> %
PINK SAUCE	+85%
DILL PICKLE	+85%
POBLANO	<b>+77</b> %
VODKA SAUCE	<b>+69</b> %
SPICY BBQ	+66%



"One idea we've discussed is asking [job] applicants to meet someone in the dining room during the interview. It's a way to gauge how comfortable they are interacting with guests."

ERIC SOLLER, OLD SCRATCH PIZZA

At Domino's, however, Weiner sounded the bugle for victory—for now, anyway. His brand reported same-store sales growth of 3% in the third quarter of 2024 and a 5.1% increase in global retail sales. "With the slate of initiatives we've got out in front of us, I continue to believe that we will deliver U.S. same-store sales growth of 3% or more annually," Weiner told investors. "And that's why I expect Domino's to continue to drive additional market share gain."

### RETHINKING THE HIRING PROCESS

As the value wars heated up, another conflict raged behind the scenes: the battle for talent. Finding and keeping reliable team members remains a challenge. Whenever PMQ shares a story about renowned legacy pizzerias closing down, comments on social media go something to the effect of, "Young people don't want to work hard!" But if you believe that, consider the perspective of Aaron Nilsson, chief information officer at Jet's Pizza, the 400-plus-unit brand based in Detroit.

Nilsson recalls growing up in a "one-stoplight farming community," where hard work meant tilling the land and stacking hay—something he watched his father do all of his life. "It's the worst job ever," he admits. "That was my definition of hard work." Today, Nilsson says, that definition has evolved.

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"We're in an information society. My daughters have grown up seeing me spend most of my time working 'hard' by sitting silently at a laptop. The definition of 'work' has changed—and we're the ones who taught it to them."

If you're still struggling to find hard workers, maybe it's time to rethink your hiring process. Just ask Christina Martin, owner of Manizza's Pizza in Las Vegas. In July, she told PMQ she'd recently posted an open position and netted 12 qualified applicants. Eleven showed up for interviews, and 10 impressed her. Although she could hire only one, Martin shared her experience to give other operators hope.

And, while her experiences are anecdotal, recent industry data supports her optimism. The National Restaurant Association reported fewer than 800,000 open positions in May 2024, down from a pandemic high of 1.5 million—a sign that vacancies have been sliced in half.

Martin's success isn't just luck. She puts care into crafting unique job listings. Instead of generic phrases like "must be able to multitask" or "work in a fast-paced environment," she uses playful language: "Are you awesome? Want to come be awesome with us?" She believes these questions help set her pizzeria apart from the competition: Who wouldn't want to be awesome?

The job applications at Manizza's Pizza are equally distinctive, with questions like, "If I gave you an elephant and you couldn't sell or get rid of it, what would you do with it?" As Martin explains, "The candidates who take their time and give thoughtful answers stand out. Even if it's something like, 'I'd start a circus' or 'I'd ride it to work, since gas is expensive,' that tells me they're creative and

not just mass-applying to jobs. Plus, we get to smile during the process—it makes it fun, not boring."

Martin also requires applicants to make a small but effective pledge in the application: They must check a box agreeing to show up for the interview. "It's not like it guarantees they will show up, but I think it reinforces their commitment," she says.

Meanwhile, Eric Soller, owner of Old Scratch Pizza in Dayton, Ohio, has experimented with new interview techniques. He's noticed that younger employees often feel uncomfortable engaging with the restaurant's guests. "They'd rather go to the dentist than pre-bus a table," Soller jokes. "One idea we've discussed is asking applicants to meet

# THE REVIEWS ARE IN

he charts on the opposite page reflect food critics' and the general public's reviews of their favorite pizzerias nationwide. Using a simple algorithm, we based the Critically Acclaimed ranking on 2024 "best-of" lists from 50 Top Pizza, *The New York Times*, TheInfatuation.com and Gayot.com; and 2023 "best-of" lists from *The Washington Post*, *Food & Wine* and TimeOut.com, as well as the current Michelin Guide. For the People's Choice ranking, we averaged out ratings for highly reviewed pizzerias on Google, Yelp, TripAdvisor and Facebook, attaching some weight to the total number of reviews.

# CRITICALLY ACCLAIMED PIZZERIAS

RANK	Pizzeria	LOCATION		
1	Pizzeria Sei	Los Angeles	CA	
2	Don Antonio	New York	NY	
3	Pizzeria Beddia	Philadelphia	PA	
4	Una Pizza Napoletana	New York	NY	
5	Tony's Pizza Napoletana	San Francisco	CA	
6	Ken's Artisan Pizza	Portland	OR	
7	Ribalta	New York	NY	
8	Frank Pepe Pizzeria Napoletana	New Haven	СТ	
9	Del Popolo	San Francisco	CA	
10	Pizzeria Bianco	Phoenix	AZ	
11	Antico Pizza Napoletana	Atlanta	GA	
12	Jay's Artisan Pizza	Kenmore	NY	
13	Roberta's	New York	NY	
14	La Leggenda	Miami Beach	FL	
15	Robert's Pizza & Dough Co.	Chicago	IL	
16	'O Munaciello	Miami	FL	
17	Pizzeria Vetri	Philadelphia	PA	
18	A16 Pizza	Oakland	CA	
19	Partenope Ristorante	Dallas	TX	
20	Milo & Olive	Santa Monica	CA	
21	Razza Pizza Artigianale	Jersey City	NJ	
22	Pig Ate My Pizza at Nouvelle Brewing	Robbinsdale	MN	
23	Pasquale's Pizza Napoletana	Wakefield	RI	
24	Song E Napule	New York	NY	
25	800 Degrees	Los Angeles	CA	

# PEOPLE'S CHOICE PIZZERIAS

Pizzeria  Mister 01  Pizzeria Posto  Pietrini Pizza Napoletana	Grapevine Rhinebeck Los Alamitos New Haven	TX NY CA
2 Pizzeria Posto  Pietrini Pizza Napoletana	Rhinebeck Los Alamitos	NY
Pietrini Pizza Napoletana	Los Alamitos	
Napoletana Napoletana		CA
	New Haven	
4 Zeneli Pizzeria		СТ
5 Pizzeria Florian	East Aurora	NY
6 Orsi's Italian Bakery & Pizzeria	Omaha	NE
7 Steve's Pizza	Battle Creek	MI
8 Pizza e Birra	San Diego	CA
9 Nolita Pizza	New York	NY
10 A Little Pizza Heaven	Scranton	PA
11 Ciao! Pizza & Pasta	Chelsea	MA
12 Sapori Di 786 Degrees	Pasadena	CA
13 Villaggio's Pizzeria	Newberry	FL
14 Tasty Pizza	Omaha	NE
15 Riccardo's Pizza & Italian Restaurant	Browns Mills	NJ
16 Pizzeria Lui	Lakewood	СО
17 Smiling With Hope Pizza	Reno	NV
18 Tilton House of Pizza	Tilton	NH
19 Terita's Pizza	Columbus	ОН
20 Simon's	Des Moines	IA
21 Domenick & Pia Downtown Pizzeria	Waterbury	СТ
22 Dominic's Truck & Dine	Ball Ground	GA
23 The Gypsy Poet	Houston	TX
24 Embers by the Lake	Hauser	ID
25 Mountain Goat Market	Monteagle	TN

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"Don't use AI like you're doing a Google search. Refine your prompts, and the system will work quickly to provide the needed information."

JIM BIAFORE, PUPATELLA

# AI AND PUPATELLA

PMQ asked Jim Biafore, CEO of the 10-store Virginia pizza chain Pupatella, how his brand is using AI to improve operations and its plan for the future. Here's what he told us:

### **Current Applications:**

- **Customer Experience:** AI-driven chatbots enhance customer service by handling orders, answering queries and providing personalized recommendations.
- **Financial Data:** AI helps in data analytics and with forecasting sales.
- Lease Review: AI will be deployed to evaluate leases to ensure dates are accurate and information is recorded as needed.
- Delivery Optimization: Our third-party delivery partners are already using AI algorithms to optimize delivery routes, ensuring faster and more efficient deliveries, which improves customer satisfaction.

"While these applications are already proving beneficial, the true game-changer will be AI's ability to provide deeper insights and automation," Biafore added. That includes:

- Predictive Analytics: Advanced AI could predict trends and customer preferences with even greater accuracy, allowing us to tailor our menu and promotions more effectively.
- **Robotics:** AI-powered robots could take over repetitive tasks in the kitchen, ensuring consistency and freeing up staff to focus on more creative aspects of pizza making.
- **Personalization:** AI could offer hyper-personalized experiences, from custom pizza suggestions based on individual tastes to targeted marketing campaigns.

someone in the dining room during the interview. It's a way to gauge how comfortable they are interacting with guests. For many young people, that kind of engagement doesn't come naturally, but we want to help them develop those skills."

Once team members are onboarded, Chase Sereda, a Little Caesars franchisee in Canada, aims to make the job feel meaningful. Inspired by another franchisee, he takes a photo of each new hire with the first pizza they make. When that team member eventually moves on, he also shoots their photo with the last pizza they make and shares both pictures on his team's WhatsApp group. "We try to celebrate wins, no matter how big or small," Sereda says. "These little things can make a big difference. They help transform your restaurant into a fun, vibrant place to work."

Hiring and retaining good talent remains a challenge, but operators like Martin, Soller and Sereda have shown that creativity, thoughtful engagement and small commitments can set restaurants apart. Their success proves that when young people are put in the right environment and given the tools to succeed, many will work just as hard as their parents and grandparents did.

### **WORKING SMARTER, NOT HARDER**

Fortunately, advances in kitchen technology, like smart ovens and digital dough presses, mean pizzeria work doesn't have to be all *that* hard in the coming years. Granted, for some pizzeria owners, changing ovens can feel a bit like getting a divorce—aside from the emotional pain of ending a longtime love affair, it's expensive, too. But if you're fed up with your old oven's mood swings and stubborn ways, newer and more compliant models await you.

They're smart, too—which is the whole point, really. Austin Titus, president of Cannoli Kitchen Pizza, with six stores in Florida and three more on the way, has installed a smart oven at a Fort Lauderdale location and plans to implement another in a Boca Raton store. "It's an electric stone conveyer oven that controls the temperature in



multiple zones: entryway, interior, bottom and exit," Titus says. "We're still learning more about them, but I can confidently say that they've improved our operations and reduced waste. The oven is a true game-changer because it provides the same—or better—product that a traditional deck oven does, using a fraction of the time, labor skill set and learning curve."

These ovens give you precise control over temperatures to ensure even and consistent cooking, Titus says. That means fewer burnt pizzas, less food waste and a boost to the bottom line. Another big plus: Smart ovens save on labor costs "because you don't need somebody tending to the pizzas and turning them the right way."

Titus is also sold on digital dough presses. "It does more of the same thing that the oven does—improved consistency in the dough thickness, size and temperature before it enters the oven," he says. "This also allows our employees to have way less of a learning curve and takes a fraction of the time, compared to traditional dough rolling or tossing. It's truly a win-win-win for everyone. The customer gets more consistency, employees can progress quicker in their ability to perform, and the business saves on the operational costs."

Then there's the much-ballyhooed rise of AI. Yes, it's just slowly inching its way into the pizza industry (not unlike robotics), but don't sleep on it. "We will find ourselves using AI in our everyday duties, such as delivery and ordering," Marco's Pizza COO John

Meyers wrote in a September 16 article for PMQ.com. He pointed to Marco's Automated Promise Time program, which "uses AI to calculate and predict the time it will take to make and deliver a completed customer order, considering the store product capacity, oven time, number of drivers, weather and traffic conditions."

Joe Park, the chief digital and technology officer for Yum! Brands (Pizza Hut's parent company), told *The Wall Street Journal* in March that "an AI-first mentality works every step of the way. If you think about the major journeys within a restaurant that can be AI-powered, we believe it's endless."

But don't assume AI is a tool for large chains only. Jim Biafore, CEO of Pupatella, with eight stores in Virginia and two in Washington, D.C., believes it will level the playing field for independents. "We're exploring AI in various aspects of our operations, and the results are promising," Biafore tells PMQ. "The great thing about AI is that it helps the small shops compete with the larger chains that typically have the resources to evaluate data." He suggests that smaller operators use AI to analyze various types of data, automate and send personalized offers to their customer database, and even help write correspondence to vendors and guests. (See sidebar on page 30 for more details.)

Using AI, smaller independents can also better keep up with online reviews, notes Jared Norris, chief customer officer for ChatMeter, a reputation management intelligence platform with clients like

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Figaro's Pizza and Glacier Restaurant Group, owner of the MacKenzie River Pizza chain in Montana. "Restaurant owners can use AI to take a pulse on real-time customer feedback by analyzing reviews and uncovering emerging trends or common problems," Norris says. "A large language model (LLM) can understand text written by people and understand sentiment, identify trends, and spot emerging issues much faster than you would reading each and every review. Analyzing customer reviews like this allows you to see your restaurant through the eyes of the customer and remove any biases or preconceived notions."

For example, Norris says, "You might notice customers are complaining about pickup or delivery orders being consistently 10 minutes late and use that information to better set expectations about timelines. Or you might receive quick feedback that customers aren't loving a new pizza on the menu and tweak its recipe to better fit their tastes."

Just don't think of AI tools like ChatGPT as search engines. They're much more powerful. "Understanding the prompts is the key to using AI properly," Biafore says. "Don't use AI like you're doing a Google search. Refine your prompts, and the system will work quickly to provide the needed information."

And if you don't know how to refine your prompts, just ask the ultimate expert for advice: the AI tool itself!

### THE FROZEN FRONTIER

Fortunately, success in 2025 doesn't necessarily hinge on shelling out big bucks for the latest technologies. Freezers aren't all that smart, but look at what independents are doing with them nowadays. Perhaps the most exciting development in 2024 was St. Louis restaurateur Katie Lee's breakthrough deal with Walmart. Lee, the owner of Katie's Pizza & Pasta Osteria, which has three locations, journeyed to Bentonville, Arkansas, in late September for Walmart's Open Call product pitch day for a shot at the coveted Golden Ticket—and scored.



Lee's frozen pizzas and pasta bakes had already emerged at St. Louis grocers like Dierbergs Markets and Straub's before moving into retailers including Fresh Market, Fresh Thyme, Kings, Balducci's, Mother's, Whole Foods and others. "We dreamed big and expanded into local grocery outlets, nationwide shipping, then moved into wider retail distribution, and now Walmart," Lee says. But she makes it clear that there's only one difference between the pizzas and pastas served at her elegant, high-end restaurants and her frozen items at retail stores: The latter are, well, frozen.

Lee started freezing her dishes for sale during the COVID-19 lockdown. A true believer in fresh, clean ingredients, she didn't want to sacrifice quality with her frozen line. "People want to cut costs and think they need to use different cheeses and different processes to make [frozen] food," she says. "So what you find in the grocery store is overly processed food with a lot of science and junk behind it. Because we had to pivot so quickly, we made our exact same pizza and sealed it and froze it. And then we realized that's the best way to do it. That's the most innovative way to do it. And it's what everyone is afraid to do."

It's also what shoppers want, Lee believes. "Consumer demands are changing, which is why we see grocers trying to make this product in-house, and they can't seem to do it." Social media is also

"[Grocery stores offer] overly processed food with a lot of science and junk behind it....
We made our exact same pizza and sealed it and froze it. And then we realized that's the best way to do it."

### KATIE LEE, KATIE'S PIZZA & PASTA OSTERIA

spurring demand for higher-quality offerings on the frozen pizza shelves. "Food is, like, No. 2 on TikTok right now," Lee says. "It's up there with music and celebrities. People are just very interested in food, and they understand food much better than they ever have, really, in history. They want to try really great food, and the retailers are taking notice. And if there's a demand, they're going to put attention toward it."

Anthony Mangieri, the celebrated pizzaiolo behind New York's Una Pizza Napoletana, would likely agree. His single-unit restaurant was rated the best in the U.S. and the world this year by 50

Top Pizza, but many of us can try his pies in our own living rooms, thanks to the growing success of his frozen brand, Genio Della Pizza, in retail stores. Mangieri and a growing number of independent pizzeria owners have been elevating a segment that Technavio projects to grow 5% annually between 2024 and 2028.

Atlanta restaurateur Brian Lewis wants a piece of that pie, too. After opening Bocado Pizza this year in Sandy Springs, Georgia, he introduced his woodfired sourdough pizzas to a wider audience through nationwide shipping. They boast flour from a small Italian farm, a dough that's naturally leavened over 72 hours, fresh mozzarella and tomatoes from Italy's Campania region.

Like Lee, Lewis wants to replicate the restaurant dining experience as closely as possible. "Our biggest challenge has been changing the ready-to-ship pizza industry's mindset," he says. "We're moving away from the conventional methods that rely on fillers and additives for extended shelf life. Instead, we've created a simple, high-quality pizza where we control every ingredient, from the dough to the sauce to the cheese. This approach allows us to offer a premium product without unnecessary additives, challenging the 180-day shelf life common in the freezer section. We're proving it's possible to make authentic restaurant-quality pizza accessible to consumers at home without compromising on ingredients or taste."

Frozen pizza looks to be the next frontier for independents. "Pizza is universally beloved," Lewis adds. "Coming out of the pandemic, we have a new expectation for convenience and accessibility. Just as services like UberEats, DoorDash, HelloFresh and Goldbelly have transformed how we're able to access restaurant-quality food with the click of a button, nationwide pizza shipping from restaurants like ours meets the demand for convenience without sacrificing quality. Our goal is to maintain a consistent Bocado experience, whether you've had our pizza at the restaurant or only know us from online orders."

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THE C-STORE FACTOR

Finally, we'd be remiss if we didn't remind you that the major chains aren't the only competitor to keep in mind next year. As convenience store retailers continue to ramp up foodservice operations, pizza is one segment where they're excelling. In fact, 199 million servings of pizza were ordered from convenience stores in the 12 months ending August 2024, according to Circana CREST consumer survey data.

Pizza lovers are seeing increased variety thanks to innovative limited-time offers (LTOs), restaurantquality ingredients and competitive pricing from c-store operators. One formidable competitor is Iowa-based Casey's General Stores, which has long proclaimed itself the fifth-largest pizza chain in the U.S., with nearly 2,900 locations. This past year alone, Casey's customers bought more than 45 million pizzas, the company says.

"This isn't gas station pizza—it's restaurantquality food from a gas station," asserts Brad Haga, senior vice president of prepared food and dispensed beverages at Casev's. "It's not crazy to think you can get handmade, delicious pizza from a convenience store."

Casev's isn't the only c-store giant seeing success from pizza. Since it started cooking up pies in 2008, 7-Eleven, with 84,000 locations worldwide, has greatly expanded its offerings to align with flavor trends and customer preferences. According to Justin Whittaker, 7-Eleven's senior category manager, their pies are baked in-store with a blend of mozzarella, Parmesan and provolone cheese, while the sauce is made with fresh tomatoes, Italian herbs, garlic, salt and pepper. "Our pizza platform has evolved over time to meet the ever-changing needs of our customers," Whittaker says. "From serving personal-size pizzas to pizza by the slice to whole pizza, we continue to grow our offerings based on what our customers want and expect."

Compared to Casey's and 7-Eleven, most c-stores operate on a smaller scale and without the same resources, but that doesn't mean they're missing out on all the pizza potential. Fischer's Neighborhood

Market, with 32 stores in the U.S., has partnered with Hunt Brothers Pizza to offer fresh pies at 13 locations. The program has steadily expanded over the years, notes Zain Bidiwala, Fischer's senior marketing and brand leader.

Hunt Brothers provides a comprehensive training program and works closely

with employees to ensure they're correctly prepared. "Training covers everything from pizza preparation to handling customer requests efficiently," Bidiwala says. "The process is designed to be straightforward, with the pizzas baking in approximately 10 to 15 minutes, making it an ideal quick-service option for our customers."

Fischer's pizzas include classics like pepperoni, sausage and cheese, plus specialty options and customizable mix-and-match toppings, giving customers plenty of flexibility for their orders.

Casey's General Stores says its customers bought more than 45 million pizzas this past year alone.

"We're focusing on promoting Hunt Brothers' menu items on our social media pages more heavily," Bidiwala adds. "Being that it's such an accessible brand, there's a lot of fun that can be had entertaining, educating and engaging our audience via our shared love for pizza, without always pushing the 'hard sell."

### LEARNING TO WIN

When CNN founder Ted Turner started various other networks that bombed—and there were a bunch of them—he was often quoted as saying, "I'm not losing. I'm learning how to win." The fact that you're still in business as 2024 grinds to an end means you've been learning that same lesson, too. It was a rough-and-tumble year that saw multiple bankruptcy filings among small pizza chains, including Buca di Beppo in August, Anthony's Coal Fired Pizza & Wings in September, Oath Pizza in November, and, perhaps most shockingly, a close call for MOD Pizza, once the fastest-growing restaurant chain in the country. Not to mention the struggles of Pizza Hut franchisee EYM Pizza,

> which filed for bankruptcy in July and will sell more than 125 stores as it undergoes financial restructuring.

But you're still here, still learning to win. So is Fran Garcia, by the way. In fact, he has a new solo concept, Panko Pizza, that's going strong in Middletown, New Jersey. "If you're willing to friggin' do it and break your ass and risk it all, go," Garcia says. "Listen to

no one. Go with your heart. But you should have a little bit of a road map and somebody you could call and ask questions to, because you could get hurt very bad.

"I'm blessed to be doing something that I love," Garcia adds. "But, I mean, I have a lot of friggin' headaches, man." 7

**Rick Hynum** is PMQ's editor in chief. **Charlie Pogacar** is

BRAD HAGA, CASEY'S GENERAL STORES

"It's not crazy to think

you can get handmade,

delicious pizza from a

convenience store."

PMQ's senior editor. Kevin McIntyre is the online editor for C-Store Decisions.

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# 30 PIZZA CHAINS BY UNIT & SALES GROWTH

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RANK	Chain Name	SEGMENT	UNITS 2022	UNITS 2023	1-YEAR GROWTH	2022 SALES	2023 SALES	1-YEAR GROWTH
1	Domino's Pizza	QSR	6,618	6,854	+3.6%	\$8,751,700,000	\$9,026,100,000	+3.1%
2	Pizza Hut	QSR	6,536	6,593	+0.9%	\$5,269,710,000	\$5,375,104,200	+2.0%
3	Little Caesars	QSR	4,173	4,217	+1.1%	\$4,724,272,082	\$4,425,507,288	-6.3%
4	Papa John's	QSR	3,180	3,220	+1.3%	\$3,712,006,593	\$3,864,198,863	+4.1%
5	Papa Murphy's	QSR	1,168	1,127	-3.5%	\$753,070,675	\$766,590,351	+1.8%
6	Marco's Pizza	QSR	1,066	1,117	+4.8%	\$1,062,476,171	\$1,025,359,480	-3.5%
7	Godfather's Pizza	QSR	604	583	-3.5%	\$284,366,616	\$289,441,966	+1.8%
8	MOD Pizza	Fast Casual	531	552	+4.0%	\$661,800,000	\$658,787,824	-0.5%
9	Hungry Howie's	QSR	536	524	-2.2%	\$534,394,104	\$458,515,041	-14.2%
10	Chuck E. Cheese	Fast Casual	473	473	+0.0%	\$360,601,466	\$380,483,756	+5.5%
11	Jet's Pizza	QSR	406	439	+8.1%	\$441,284,098	\$499,418,643	+13.2%
12	Round Table	QSR	406	408	+0.5%	\$463,037,922	\$495,293,749	+7.0%
13	Sbarro	QSR	340	394	+15.9%	\$234,419,372	\$296,455,788	+26.5%
14	Blaze Pizza	Fast Casual	303	296	-2.3%	\$402,625,700	\$389,993,077	-3.1%
15	Mountain Mike's Pizza	QSR	265	279	+5.3%	\$278,738,015	\$297,916,665	+6.9%
16	Cici's Pizza	QSR	273	273	+0.0%	\$329,775,127	\$354,276,965	+7.4%
17	Simple Simon's Pizza	QSR	200	220	+10.0%	\$76,506,391	\$84,833,768	+10.9%
18	Pizza Ranch	QSR	211	218	+3.3%	\$326,281,800	\$320,580,272	-1.7%
19	Fox's Pizza Den	QSR	213	215	+0.9%	\$213,380,050	\$226,552,086	+6.2%
20	Donatos Pizza	QSR	173	178	+2.9%	\$207,000,000	\$215,052,383	+3.9%
21	Mellow Mushroom	Casual Dining	168	161	-4.2%	\$456,739,000	\$447,787,909	-2.0%
22	California Pizza Kitchen	Casual Dining	161	148	-8.1%	\$538,810,362	\$647,766,589	+20.2%
23	Pizza Factory	QSR	110	125	+13.6%	\$88,648,372	\$103,380,120	+16.6%
24	Pizza Pro	QSR	155	119	-23.2%	\$186,189,682	\$150,642,683	-19.1%
25	Pizza Inn	QSR	143	119	-16.8%	\$86,253,000	\$96,021,000	+11.3%
26	Ledo Pizza	QSR	120	118	-1.7%	\$135,000,000	\$140,968,240	+4.4%
27	Pieology	Fast Casual	119	109	-8.4%	\$136,398,509	\$119,665,452	-12.3%
28	Giovanni's Pizza Power	QSR	120	105	-12.5%	\$98,073,043	\$91,225,396	-7.0%
29	Peter Piper Pizza	QSR	99	102	+3.0%	\$137,154,334	\$151,230,977	+10.3%
30	Imo's Pizza	QSR	100	102	+2.0%	\$122,379,279	\$132,676,833	+8.4%



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