

The Grocer

Focus On: Pizza by Alex Wright (apnwright@yahoo.co.uk)

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The Story

Pizza is going posh. The supermarkets have sold an extra 19.2m worth in the past year, growth that's brought the market's overall value tantalisingly close to the £1bn mark. Crucially, value is growing ahead of volume as shoppers switch from cheap frozen to pricier fresh pizza. So which retailers and brands are driving this? How? Who's being left behind? And why?

Key themes:

Own label v brands: More than two thirds of pizzas sold by the supermarkets are own label, so we'll be looking to speak to the big own label manufacturers as well as the brands for this. Why is own label outgrowing brands? And why are average prices rising for own label as branded prices fall? Are retailers and their suppliers developing more premium products or are pizzas just getting smaller?

Retailers: Central to this feature will be analysis of how different retailers are approaching pizza, with particular attention being paid to how retailers are driving value into the category through their premium tier own label lines and fresh pizza counters. We will be looking to identify retailers' most successful new launches through discussions with retailers and manufacturers.

Innovation: This will be key to this feature. We will be investigating how branded and own label new product development has shaped the category over the past year and what is in store for shoppers in 2016. We will be profiling four of the most interesting launches in a separate innovation panel.

Frozen v chilled: Fresh pizza is outgrowing frozen. Why? How have factors such as NPD, advertising and price affected the market in the past year? Is fresh still perceived as being better quality than frozen? Why is average price falling in frozen as it rises in frozen?

Promotions: This feature will explore how the promotional strategies of retailers and brands have changed over the past year, particularly in light of the rise in own label. Attention will be paid to the promotional strategies of retailers and how this has affected average prices over the past year.

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest brands have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?