

SMARTCHAIN

OCTOBER 2018

VENDOR RESOURCES / TRENDS / NEW PRODUCTS Limited-Service, Unlimited Possibilities

QSR

Dynamic Duo

S2

Going Global

S6

Pizza Power

S7

Key Players

S8



PIZZA, PASTA, AND PROFIT

Industry staples are adapting to new food trends to drive restaurant sales.

BY DAVINA VAN BUREN

Dynamic Duo

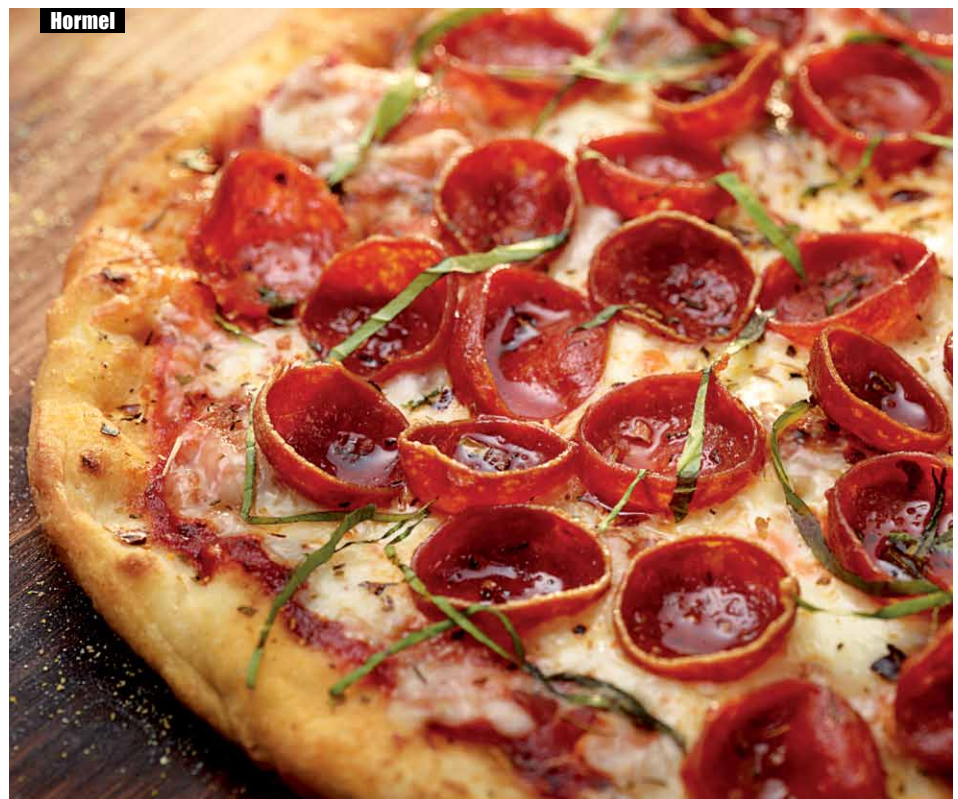
Pizza and pasta can help your quick serve stand out among a sea of sandwiches.

Pizza and pasta are comfort foods that connect many of us to fond memories: Italian grandmothers who simmer the perfect sugo sauce, or Southern-style Sunday dinners with creamy macaroni and cheese served alongside crispy fried chicken. Even one of the most enduring love stories ever to be told on the silver screen—*Lady and the Tramp*—is most famous for the iconic spaghetti and meatballs scene. And who doesn't love pizza? From grade-school cafeterias to hipster kitchens across the nation, the classic pie continues to reinvent itself.

Both pizza and pasta have several attractive qualities with regard to taste and profitability, but equally important is the strong emotional connection Americans have to these foods. "Pasta is loved by nearly everyone," says Liz Housman, director of marketing for **Dakota Growers Pasta Company**. "Its fans span all ages, ethnicities, regions, and cultural backgrounds."

In the most traditional sense, pasta is made with durum wheat semolina and water and is formed through a die to form its shape. There are hundreds of shapes, but spaghetti, lasagna, penne, and fettuccine are the most popular today. "Americans have had a long love affair with pasta," says Robert A. Vermlyen, vice president of **Zerega**. "In addition to being a comfort food, it is perceived as being easy to prepare, economical, and nutritious—especially when included in a healthier Mediterranean-style diet."

Americans also have a deep-rooted love for pizza. "Everyone remembers being a kid and having a piece of pizza that was too hot and burned the roof of their mouths—whether it was reheated in the deck oven of a New York City slice shop,



"Technology today allows operators who don't have the equipment or labor to still serve great pasta, with pre-and-par-cooked pasta that can be prepped in a third-party facility and delivered to the unit level ready to use."

or a frozen square of Elios out of the home oven," says Anthony Panichelli, foodservice brand manager for pizza toppings at **Hormel**. "Nostalgic as ever, pizza is the ultimate comfort food."

As consumers become more educated about where their food comes from, many quick serves are capitalizing on that nos-

talgia while also experimenting with bolder flavors. Many fast casuals are expanding their menus to include more pizza and pasta options, particularly for health-conscious diners.

Typically restaurant leaders and diners think of "clean" meats and plant-based options when they think of healthy foods,

but it's important to note that the pasta and dough industries have evolved, too. Manufacturers—and restaurateurs—are listening to consumers who want ingredients that are minimally processed and contain less fat and sugar. On one hand, this means consumers have more choices than ever. On the other, the industry has also seen tremendous consolidation.

“Where there may have been more than 50 regional pasta manufacturers in the mid-20th century, today there are eight large pasta manufacturers in the U.S. operating fewer than 20 large pasta plants,” Vermeylen says. These modern, highly-efficient operations produce mass quantities of dry pasta products.

The product mix has also changed over the years. Twenty years ago, the majority of retail and foodservice pasta sold consisted of the most popular pasta shapes, such as elbow macaroni, spaghetti, rotini, and shells, and was made with one ingredient: 100 percent durum semolina. Today,

“The science has shown that pasta is a natural part of a healthy, sustainable diet.”

pasta comes in dozens of shapes and sizes and isn't limited to Italian restaurants and cuisine—it's at home on ethnic menus from coast to coast in iconic dishes. It can be seen in dishes like Vietnamese pho—typically made with rice noodles—and fun takes on classic street snacks, like taco pasta.

In the last decade, the use of nontraditional flours has increased, allowing for even more customization and healthy options. “Whole-wheat pasta led the movement, but more recently, gluten-free pastas can be found on many menus for substitutions or in gluten-free only pasta dishes,” Housman says. The same can be said for pizza crusts. Ancient grains like buckwheat or teff are being added to traditional or gluten-free semolina flours, which make for a heartier, more rustic flavor, and are often more filling due to their higher fiber content.

While the “better for you” category has garnered much attention over the past several years, its sales still total less than 12 percent of the pasta category. For now, quick serves and fast casuals that are looking to experiment with pasta on their menus may be best served to stick with traditional semolina varieties, but with a twist: offer new and interesting shapes, such as cavatappi, pipette rigate, and twisted elbows. Pappardelle and mafalda

are also rising stars on pasta menus. “The long mafalda has a wide surface and curly edges that gives a dish a commanding presence,” Housman says. “It matches well with creamy sauces like alfredo or sugo sauces made with braised meats.”

Another trend is the customization of pasta shapes to improve pasta performance and customer satisfaction. “This includes changing the pasta's size or wall thickness to enable it to hold up in a demanding foodservice environment,” Vermeylen says.

For pizza, trends also point to more healthy options—as seen in shaved fennel, naturally-fermented doughs, and wilted greens as popular toppings—though the pendulum swings more broadly in this category. At the other end of the spectrum, Wisconsin brick cheese, rough chop pork sausage, and mounds of cupping pepperoni can take an already “guilty pleasure” dish to the next level of gooey deliciousness.

When considering adding pizza or pasta to an existing menu, quick-service operators should keep a few key ideas in mind. First, it requires minimal equipment to make both dishes. Pasta lends itself to quick service with the ability to cook off product in the morning and re-therm it to order with added sauce and ingredients in as little as three minutes.

“Finishing pasta in sauce onsite in a skillet and to order delivers the best experience,” says Yury Krasilovsky, foodservice chef for **Barilla**. “But technology today allows operators who don't have the equipment or labor to do this to still serve great pasta, with pre- and par-cooked pasta that can be prepped in third-party facility and delivered to the unit level ready to use.” High-quality pizzas require a bit more equipment—a hearth deck or wood-burning brick oven—but come in surprisingly small sizes these days. If a restaurant has room, it can be well worth the investment.

These comfort foods are also a familiar and “safe” way for diners to experiment with new flavors, allowing brands



to introduce a new ingredient or cooking technique in a friendly context. Both dishes lend themselves to creating new menu options using ingredients already in the pantry, whether it's using freshly chopped vegetables, cooked meats, or made-in-house dough. Additionally, both pizza and pasta can be cost-effective ways to stretch the budget by pairing with more expensive ingredients, like cream sauces, specialty items, and seafood.

"There's a lot of sameness on menus, especially in quick-service restaurants," Krasilovsky says. "Even a small amount of innovation in terms of pasta cut, shape, or sauce outside of the basic red or white sauces and spaghetti or penne can do a lot to differentiate a brand." This is exactly what consumers are searching for—something new and different, yet undoubtedly familiar. Simple promotions centered around pasta, like "pick your pasta, pick your sauce, pick your protein" specials, can be popular with families mid-week and help use excess product.

As for pizza, operators can capitalize on the techniques popularized by trendy pizza shops. Examples include the spicy square slice, Detroit-style pizza, New Jersey bar pie, and using two different types of mozzarella. "Pizza is essentially only a few ingredients, so to stay on top of the most craveable ways to put those ingredients together is to stay top of mind for consumers," Panichelli says.

Savvy restaurateurs will also stay in tune with the changing perceptions—and misconceptions—about these comfort foods over time. For years, bread and pasta makers have fought against the idea that these foods cause weight gain. Pizza and pasta will always have their place on "cheat day," and like almost any food, they can be prepared in ways that are decadent and over-the-top. But at their core, they can be part of a healthy diet.

"Pasta is a healthy food," Housman says. "It is a perfect foundation in creating delicious and satisfying dishes and can be paired with fiber-rich vegetables, lean sources of meat and fish protein, monounsaturated olive oil, antioxidant-rich tomato sauce, and more." Pasta also contains complex carbohydrates that slowly

"Even a small amount of innovation in terms of pasta cut, shape, or sauce outside of the basic red or white sauces and spaghetti or penne can do a lot to differentiate a brand."



release energy in our bodies—particularly handy for endurance athletes—and glucose, which is crucial fuel for brain and muscle health and development.

"The science—and centuries of pasta consumption by healthy Mediterranean people—has shown that pasta is a natural part of a healthy, sustainable diet," says Krasilovsky. The same is true for pizza. It's all about proper portion sizes and using a whole grain base as a vehicle for healthy fats, fresh produce, and lean proteins.

In the future, look for pizza-making robots in quick-serve kitchens, a continu-

ation of product line diversification with an emphasis on nutrition and performance in the operators kitchen, and even 3D-printed pastas and pizzas. These comfort foods can even help save the earth, as both are excellent vehicles for "ugly produce" and excess veggies that can be blended into sauces. And in the sudden rush to find plastic straw alternatives, pasta has been offered as a cost-effective solution. "Long-term, it may not be the best choice, but it does provide another proof point for pasta's enduring popularity and versatility," Krasilovsky says.

Going Global

Taking a cue from foreign cultures, pizza and pasta get a healthy makeover.



Because pizza and pasta are familiar and beloved foods to the American consumer, they can be an excellent way to introduce new or experimental ingredients and techniques to customers. Capitalizing on two trends—healthy eating and international flavors—both pizza and pasta also appeal to age groups and demographics across the board.

“Whether pasta originated in the countryside of Italy or China is up for debate, but one cannot deny the major influence pasta and noodles have on the cuisines and dishes we love today,” says Liz Housman, director of marketing for **Dakota Growers Pasta Company**. “Pasta is a platform that allows chefs to create global mash-ups.”

Whether simple and straightforward or more complex with ethnic spices, herbs, and upgraded sauces, chefs can experiment with a wide range of flavors using ingredients they may already have on hand or can easily order. For example, trend-forward *cacio e pepe* (cheese and pepper) is a simple dish made with just five quality ingredients—spaghetti, pecorino cheese, Parmigiano-Reggiano, olive oil, and cracked black pepper—yet it makes a lasting impression when executed correctly.

Veggie-centric dishes featuring roasted or charred vegetables tossed with penne in a pesto sauce, or spicy curry with fresh cilantro, scallions, linguine, and shrimp, are examples of ethnic influences.

“Without question, awareness and access to authentic Italian foods and regional cuisines has only stoked the fires of Americans’ love for pasta and has also led to an interest in better quality pastas,” says **Barilla** foodservice chef Yury Krasilovsky.

Globalization has also led to pizza’s elevation from dorm room provision to Instagram-worthy trend food. “You can now make any style of pizza in any part of the world,” says Anthony Panichelli, foodservice brand manager for pizza toppings at **Hormel**. “You can get 00 flour and San Marzano tomatoes if you’re in Tokyo and Wisconsin brick cheese if you’re in California.” When traditional foods combine with local ingredients and regional cooking techniques, the flavor combinations are endless.

Traditional pasta is made with durum wheat semolina and water and contains about seven grams of protein per serving. It plays well with emerging plant proteins like chickpeas, Mediterranean flavors, lentils for an African or Middle Eastern-inspired dish, or a hummus dressing in a cold salad. To meet the growing demand for healthier quick-service options, however, a variety of plant-based pastas and pizza doughs have entered the market in the past few years. “Gluten-free pasta manufacturers are innovating with pastas made from chickpeas, red and yellow lentils, mung beans, and buckwheat—all of which are packed with protein and fiber,” Housman says. “These flavorful pastas should carefully be paired with sauces and ingredients that marry well to the taste.”

Modern takes on perennial favorites resonate. Using pizza and pasta to introduce customers to new flavor combinations or cooking techniques can be an effective way to boost offerings, sales, and return visits. **SC**

Pizza Power

This perennial favorite still reigns supreme in NYC and beyond.

Pizza enjoys a cultural relevance shared by few other foods. It's the fuel of college students cramming for exams, the family dinner outing everyone can agree on, or the reward for the little league team winning the game. Nine times out of 10, even a bad pizza is still pretty darn good.

With the proliferation of foodies, pizza, like many common foods, has benefitted from some serious upgrades the past few years. Thanks to social media, the locavore movement, and the hype around specific toppings, such as bacon, the classic pepperoni pie now appears next to avant-garde offerings, like dessert pies, plant-based crusts, and more.

"It started with Italian-American pie and slice shops in New York, went nationwide with help from a few large chains,

and is now experiencing a growth spurt that includes fast-casual chains and pizzerias earning accolades for specific styles of pizza," says Anthony Panichelli, foodservice brand manager for pizza toppings at **Hormel**. "There has never been a more exciting time to be a fan of pizza."

Though several cities are becoming worthy pizza destinations—Austin, Portland, and New Haven, Connecticut—New York City continues to hold court at the epicenter of American pizza culture. As such, some of the best pizza in the country can be found in the five boroughs.

Capitalizing on the "better for you" trend, kale, arugula, and other dark leafy greens are becoming more common as toppings, as are root vegetables. And while cauliflower has been used as a low-carb crust alternative for years, the indus-

try is seeing even more crust options, such as zucchini, quinoa, sweet potatoes, and beets. Eggplant and portobello mushroom caps can be used as "crust" for low-carb presentations. And pineapple isn't the only fruit topping on pizzas anymore. Figs and blueberries can be seen in many savory applications; pears and apples pair well with Italian cheeses; and sweet and tart fruits, like blackberries, cherries, and plums, are slowly making their way onto pizza menus nationwide.

Also en vogue at the moment are square slices, and the debate about what differentiates Sicilian from Detroit styles rages on. While both styles boast thick white crusts, the consensus seems to be that Detroit-style pizzas have extra crispy bottom crusts and edges—which originated when chefs used pans made of industrial parts instead of traditional baking sheets during the height of the car manufacturing age.

International and regional foods are also hot toppings for 2018. Datassential reports that specialty meats like guanciale, speck, soppressata, and chorizo showcase various curing methods, while pork belly, pulled pork, and brisket highlight Southern influences and flavors—another strong dining trend. On the high end, lobster and duck are increasing in popularity, and spicy food is also trending. Consider options that can add heat to a traditional pie, like Calabrian chili peppers and Sriracha.

It's hard to imagine a more versatile food than pizza. Round or square, piled high with pepperoni and gooey cheese or as light and healthy as a salad, this fan favorite is destined to reign supreme in America's hearts—and stomachs—for years to come.

