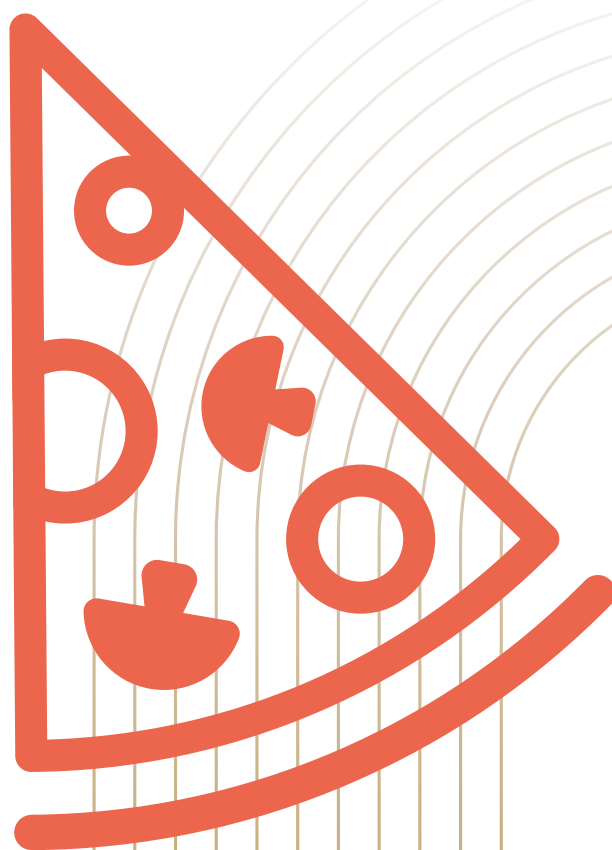


2025

PIZZA NEW INNOVATION WHITE PAPER



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PREFACE

Pizza, a food with Italian origins made with special sauces and toppings, has evolved into a globally popular cuisine that transcends language and cultural barriers and is loved by consumers around the world.

In China, pizza has gradually integrated the dual characteristics of fast food and casual dining. Driven by consumption upgrades and the diversification of the catering industry, the sector continues to expand: in 2024, the size of China's pizza market reached RMB 48 billion, and as of March 2025, the number of pizza stores nationwide exceeded 60,000. The market is projected to grow to RMB 60.8 billion in 2025.

From its roots as a traditional Italian import to the large-scale expansion of American-style fast food pizza, and now to local brands innovating by blending with Chinese food culture, China's pizza industry has formed a landscape of "East-West integration and multi-level competition", showing new potential that draws widely from diverse influences while also emphasizing individuality and uniqueness.

In terms of product innovation, the pizza industry has been making continuous advancements and introducing new ideas across various dimensions, such as crust thickness (thin or thick), diverse flavors, health-conscious concepts, integration of Chinese regional cuisines, and open product matrices. The growing demand for healthy and diverse diets has led the industry to incorporate more options like vegetarian, low-sugar, low-carb, and gluten-free options into menus. Consumers are also increasingly

Market size
reached RMB 48
billion in 2024

Number of
stores exceeded
60,000 in March,
2025

Market size
expected to reach
RMB 60.8 billion
in 2025

favoring personalized pizza customization, allowing them to select toppings and flavors based on their individual tastes and dietary needs.

In terms of business models, the pizza industry has seen a continuous rise in chain franchising rates, with brands expanding through franchising and opening stores. This accelerates competition in communities and lower-tier markets, showing new potential in localized operations. Meanwhile, growing consumer demand for food delivery has further fueled the boom in pizza takeout services. With the development of the internet, online ordering and food delivery services have become indispensable channels for the pizza business operation. In the future, the pizza industry is expected to further enhance the operation of online platforms and optimize user experience by offering convenient ordering and delivery services.

In terms of brand marketing, the pizza industry is undergoing unprecedented and profound transformation amid the explosion of traffic and consumption scenarios. Brands are continuously exploring innovative marketing models around digital interaction, cross-brand collaborations, and localized strategies to offer both functional and emotional value to consumers. The pursuit of being "emotional, entertaining, useful, and tasteful" has become a common goal in pizza brand marketing.

In 2025, with Gen Z becoming the main consumer force, the untapped potential in lower-tier markets being unlocked, and the maturation of ready-to-eat food technologies, the industry is expected to enter a new growth cycle.

This report analyzes the development path of China's pizza market and forecasts future potential trends from four dimensions: industry overview, market segmentation, brand matrix, related product and its development, providing strategic insights for industry players.



China's Pizza Industry Overview

Definition & Scope

Market Size

Development Overview



Definition & Scope

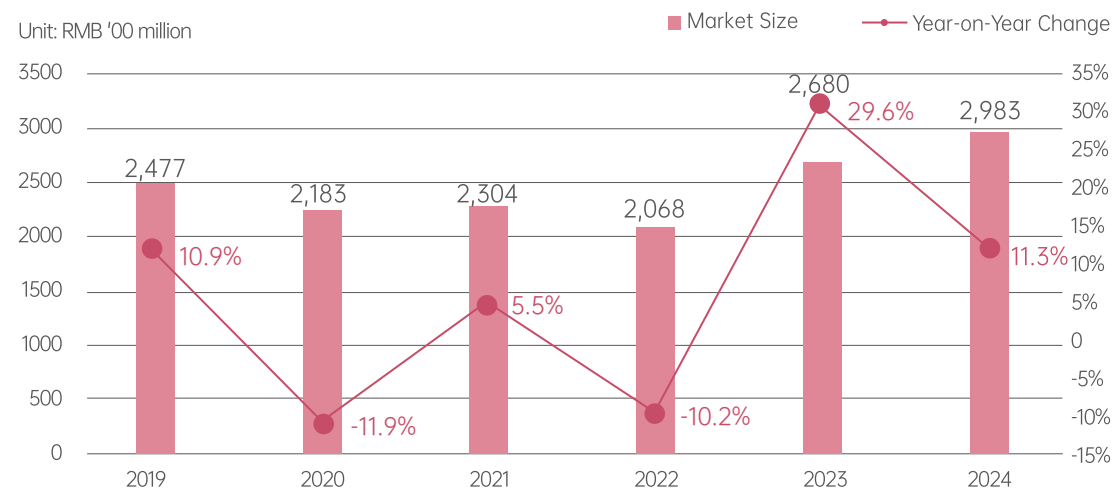
Pizza - also referred to as "Pisa", "Pita", or "Italian Pie" - is a food originating in Italy and widely popular around the world. The typical method of preparing pizza involves spreading tomato sauce, cheese, meats, vegetables, and other toppings on a round, leavened dough base and baking it in an oven.

The pizza industry encompasses traditional Italian pizza, American fast-food pizza, and locally innovated varieties. It can be segmented into fast-food pizza and casual dining pizza. Consumption scenarios include dine-in made-to-order, home delivery, and frozen ready-to-eat products.

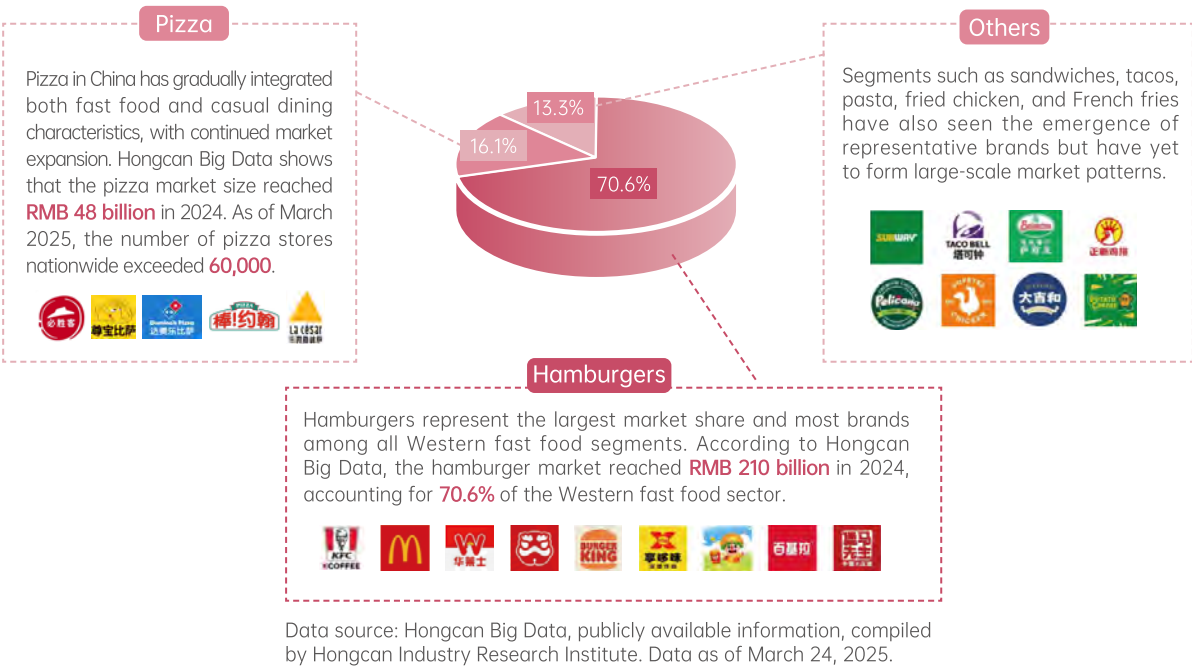
Market Size

Number of Stores & Market Size: Around 60,000 pizza stores nationwide, with a projected market size of approximately RMB 60 billion in 2025.

In recent years, as residents' income levels have risen, the pace of life has accelerated, and consumers have become more accepting of Western cuisine, the market size of the Western food industry in China has continued to grow. According to data, China's Western-style fast food industry exceeded RMB 290 billion in 2024, an increase of 11.3% year-on-year.

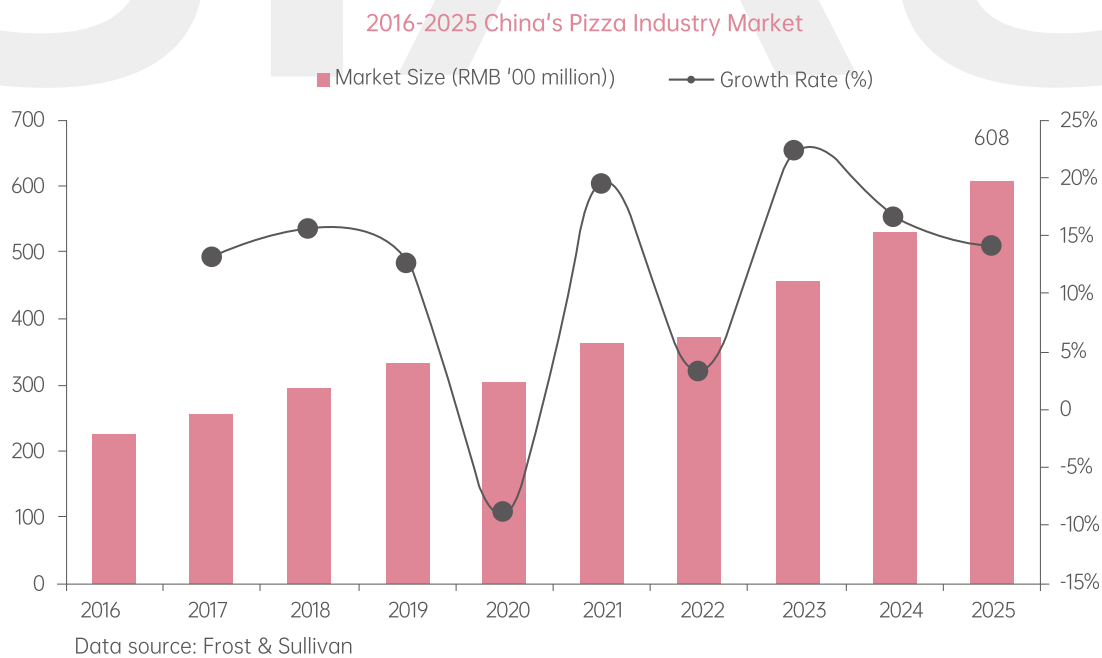


Data source: Hongcan Big Data



As a major segment in the Western food market, pizza has seen rapid growth in market size in recent years. According to data, as of June 2024, the number of pizza stores in China approached 60,000, with a market size of approximately RMB 48 billion in 2024.

It is projected that with increasing pizza penetration in both first-tier and lower-tier cities, along with the widespread availability of delivery services, both market size and number of stores in the pizza industry will continue to grow. By 2025, the market size is expected to reach RMB 60.8 billion, further rising to RMB 77.1 billion by 2027, reflecting a five-year compound annual growth rate (CAGR) of 15.5%.

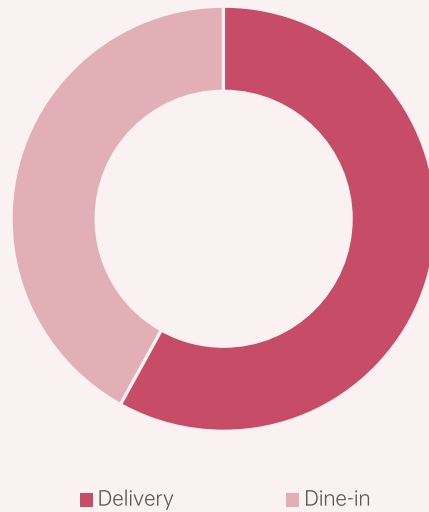


From the perspective of the industry's online and offline structure, thanks to the rapid development of e-commerce platforms and the food delivery sector in recent years, as well as the sharp increase in internet users in China, the online market share of the pizza industry has continued to grow, surpassing the offline market for the first time in 2022 with a share of 58.1%. Looking ahead, with the rapid development of China's food delivery and internet industry, the online market share of the pizza industry is expected to continue to increase.

Online market share
of pizza industry in
2022

58.1%

2022 China Online & Offline Pizza
Market Distribution





Urban Development Opportunities: Lower-tier Cities Represent the Future Growth Potential for the Pizza Industry

From the perspective of market segmentation by city tiers, the pizza market in China is currently concentrated in first-tier and new first-tier cities, which together accounted for 63.5% of the market in 2022. Although second-tier, third-tier and lower-tier cities currently hold a smaller market share, the growth rates are higher and show greater market potential. Between 2016 and 2022, third-tier and lower-tier cities experienced a compound annual growth rate (CAGR) of approximately 10%, higher than the 7.6% CAGR in first-tier cities and 9.1% in new first-tier cities. It is foreseeable that as Western cuisine becomes more widespread and first-tier city markets become saturated, second-tier, third-tier and lower-tier cities will become the main growth areas for the industry.

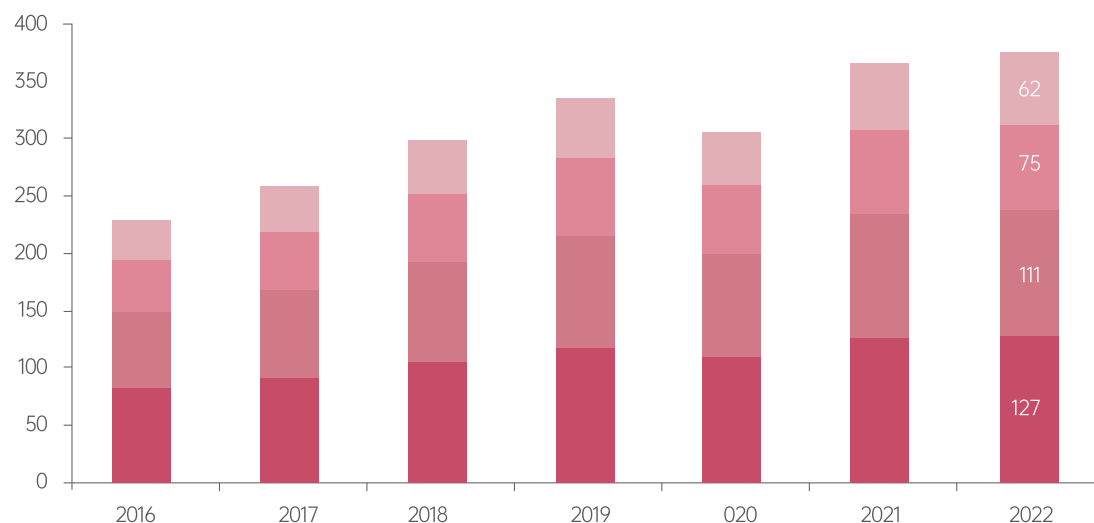
2022 first-tier & new first-tier cities pizza market share

63.5%

2016-2022 China's Pizza Market Distribution by City Tier

Unit: (RMB '00 million)

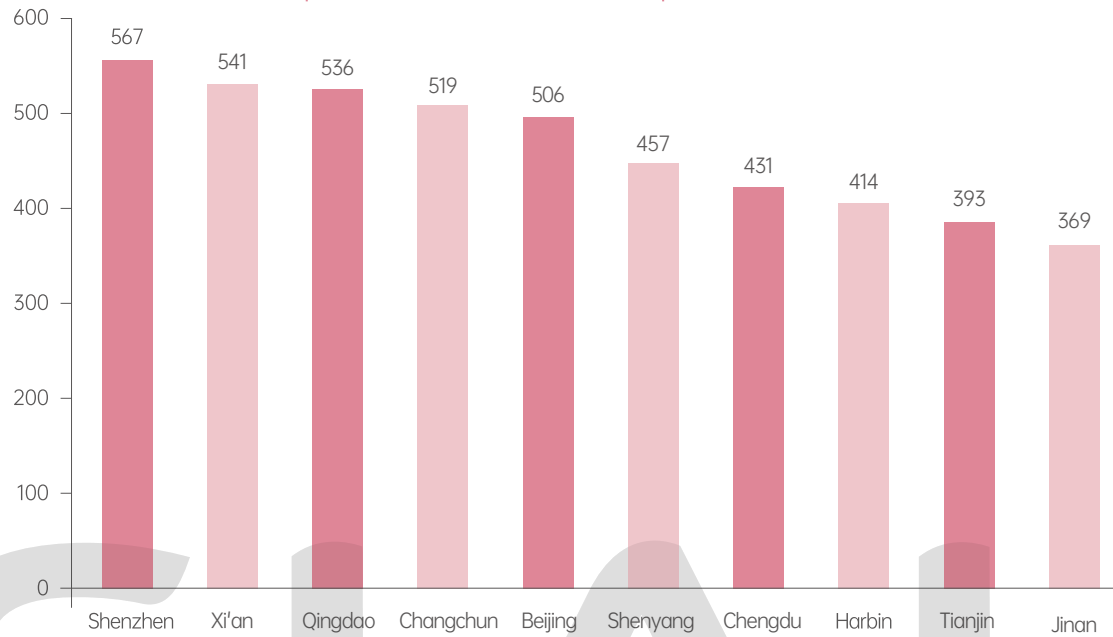
■ First-tier Cities ■ New First-tier Cities ■ Second-tier Cities ■ Third-tier and Lower-tier Cities



Data source: Frost & Sullivan

In terms of city distribution, Qcc.com data shows the top 10 cities by number of pizza-related enterprises are: Shenzhen, Xi'an, Qingdao, Changchun, Beijing, Shenyang, Chengdu, Harbin, Tianjin, and Jinan. Central-western and northern cities in China demonstrate significant growth potential.

Top 10 Cities for Pizza-related Enterprises (Unit: Nos.)



Only include businesses classified under the national standard category of "Catering Industry" and whose enterprise name, business scope, or product name contains keywords such as "pizza".

Data source: Qcc.com



Market Density Analysis: 11.7 Stores per Million People, with Triple Growth Potential Compared to Japan and South Korea

2022 China vs. Selected Countries Worldwide Pizza Store Density Comparison



Data source: Frost & Sullivan

At present, the penetration rate of the pizza market in China remains relatively low. According to available data, China had a pizza store density of 11.7 stores per million people in 2022, while the United States ranked first globally with 232.4 stores per million people. There is a significant gap between China and Western countries such as the United States, Australia, and the United Kingdom in terms of pizza store numbers. Even compared to East Asian countries like Japan (29.5 stores) and South Korea (30 stores), China still lags behind. Given that China, Japan, and South Korea share similar dietary cultures in Asia, with rice and wheat-based foods playing important roles in daily consumption, the acceptance and popularity of pizza among the public are comparable. Thus, China is likely to reach the store density levels of Japan and South Korea, indicating a potential market expansion of approximately threefold.

China pizza store density

11.7 stores per million people

The United States pizza store density

232.4 stores per million people



Development Overview

Pizza Classification & Development History

Pizza Product Classification

Pizza comes in a wide variety of types. Based on origin and popular regions, it can be categorized into Italian pizza, American pizza, Chinese local pizza, and fusion creative pizza. Based on one of pizza's core features - the thickness and style of its crust - it can be classified into types such as thin-crust pizza, traditional hand-tossed pizza, and deep-dish pizza. The type of crust directly affects the tastes, preparation methods, and consumption scenarios.

Pizza Product Classification (by Origin and Popular Region)

Type	Characteristics	Brands
Italian Pizza	Originating in Italy, it emphasizes traditional techniques and ingredients, such as stone-oven baking, fresh mozzarella cheese, and Italian spicy sausage.	PizzaMarzano (Italian hand-crafted thin-crust pizza) Albero (Italian wood-fired pizza)
American Pizza	Incorporate American characteristics, differing from Italian pizza in ingredients and preparation methods. Crust styles vary (e.g., New York thin crust, Chicago deep dish), with rich and generous toppings.	Pizza Hut (global chain) Domino's Pizza (American fast food pizza representative)
Chinese Local Pizza	Integrate local tastes by launching innovative products like durian pizza and spicy crayfish pizza.	Lacesar (pioneer of durian pizza) Champion Pizza (Chinese sausage pizza)
Fusion Creative Pizza	Cross-cultural fusion styles (e.g., Japanese teriyaki, Korean kimchi) appealing to younger consumers.	Tube Station Pizza (giant pizza + American fast food) Mr. Pizza (Korean-style creative pizza)

Pizza Product Classification (by Crust Type)

Type	Characteristics	Brands
Traditional Hand-tossed Crust	Hand-tossed dough with fluffy edges and a soft interior, medium thickness, focusing on dough fermentation and artisanal craftsmanship.	Pizza Hut (Pan Pizza) Lacesar (hand-crafted fresh pizza)
Thin-Crust Pizza	Crust is about 2-3 mm thick, crisp texture, short baking time, suitable for fast-paced consumption.	Domino's Pizza (classic thin-crust hand-tossed) Papa John's Pizza (thin-crust pizza)
Chicago Deep-dish Crust	High-edged deep pan with crust thickness up to 5 cm, filled with rich ingredients like cheese and meats, requires long baking time.	Giordano's (Chicago local brand)
Sicilian Thick Crust	Also known as "thick sponge", Sicilian pizza has a rectangular thick crust with a crispy exterior and soft interior, traditional Italian style. Toppings are fresh and light, typically including tomatoes and anchovies.	Pizzeria Spontini (Italian local brand, known as the benchmark for Milanese thick pizza)
Whole Wheat / Healthy Crust	Made with whole wheat, gluten-free, or low-calorie flour to cater to health-conscious consumers.	Wagas (light food pizza) Green Option and other niche healthy brands

Origin & Main Types of Italian Pizza

The prototype of pizza appeared quite early. As far back as ancient Greece, people were already adding onions, garlic, and herbs to flatbreads.

However, the pizza we are familiar with today - featuring cheese and tomato - did not emerge until the late 17th century. This is because tomatoes, originally from South America, were only introduced to Europe after the discovery of the New World in the early 16th century. It wasn't until the late 17th century that tomatoes became a common ingredient in Naples, Italy.

In 1889, Italian King Umberto I and Queen Margherita visited Naples and became intrigued by this humble cuisine. They invited a local chef to prepare a pizza for them. The chef created three flavors, among which the most famous featured tomatoes, mozzarella cheese, and basil - red, white, and green - the colors of the Italian flag. Thus, the legendary Margherita Pizza (La Pizza Margherita) was born.



La Pizza Margherita

After Neapolitan pizza gained fame, l'Associazione Verace Pizza Napoletana was established in Naples in 1984 to define detailed standards for the ingredients and preparation methods of authentic Neapolitan pizza. The dough must be made with ultra-fine "00" flour milled from the core of wheat. The tomatoes must be the San Marzano variety, known for their low acidity and bright sweetness. The cheese must be mozzarella made from buffalo milk. The pizza must be baked in a wood-fired oven with an open flame, reaching a central temperature of 500° C, enabling the pizza to be cooked in just 90 seconds.

The association even specifies which flavors qualify as true Neapolitan pizza. Only two varieties are officially recognized as Neapolitan pizza: Margherita Pizza (La Pizza Margherita), made with tomatoes, mozzarella cheese, and basil, Marinara Pizza (La Pizza Marinara), made with tomatoes, garlic, oregano, and olive oil, also known as "Sailor's Pizza". It contains no cheese, and its ingredients are suitable for long-term storage, making it a practical option for sailors on long voyages

In December 2017, the traditional art of Neapolitan pizza-making was inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity.



Sailor's Pizza

Because Neapolitan pizza is so iconic, it has become almost synonymous with Italian pizza in general. As a result, terms like "tomato", "mozzarella cheese" and "thin crust" are often the first things that come to mind when people think of Italian pizza.



Tomatoe



Mozzarella
Cheese



Thin Crust

However, different regions of Italy have their own distinctive pizza styles, including thick-crust varieties.

For instance, Sicilian pizza, originating from Sicily in southern Italy, uses three times the usual amount of yeast and double the fermentation time, resulting in a soft and spongy texture-earning it the nickname "thick sponge". Different from American pizza, toppings of Sicilian pizza lean toward freshness, typically featuring tomatoes and anchovies.

Many American pizzas, such as Chicago deep-dish, Philly tomato pie, and American Sicilian pizza, are rooted in the Sicilian pizza tradition.

Another variety is Sardenara pizza, which features a thicker dough made with high-gluten flour for a chewier texture. Toppings include onions, garlic, black olives, anchovies, and sometimes cheese and oregano.



Sardenara Pizza

Sardenara pizza hails from Genoa, the capital of the Liguria region, and is widely considered a forerunner of modern pizza. It was especially popular in the late 15th-century Mediterranean, where it was favored by Genoese admiral Andrea Doria. As a tribute, the pizza was also known as pissaladière (a nod to Andrea).



Sicilian Pizza



Roman Square Pizza

Traditional Sardenara pizza did not contain cheese, but modern versions often include oregano and cheese to better suit contemporary tastes - after all, "cheese is power". Sardenara pizza is also popular in southern France and is considered a traditional dish in cities such as Nice, Marseille, and Toulon.

Then there is Roman pizza, which breaks from the typical round, hand-tossed shape of most Italian pizzas. However, Roman square pizza is an exception. Roman square pizza dough is rolled out with a rolling pin to form a large, thin, rectangular base that bakes into a crisp, cracker-like crust. Roman pizza allows for highly flexible toppings-ranging from simple cheese-only versions to fully loaded combinations-catering to all preferences.



Origin & Main Types of American Pizza

Pizza made its way to the United States as early as the 19th century alongside Italian immigrants, but it remained mostly confined to Italian-American communities. After World War II, American soldiers stationed in or near Italy brought their love for pizza back home, helping to popularize it across the country. From there, pizza spread across the U.S. and eventually around the globe.

American-style pizza was adapted to local preferences: more cheese, thicker dough, and a richer, more indulgent flavor profile compared to the light, fresh characteristics of Italian pizza.



New York Pizza



For example, New York Pizza is made with high-gluten flour and cold-fermented dough. The crust is thin, yet chewy and flexible. Toppings often include dry mozzarella cheese, pepperoni, and sausage. While it shares similarities with Italian thin-crust pizza, New York pizza is sturdier - you can fold a slice in half and eat it on the go, perfect for the city's fast-paced lifestyle.



Chicago Deep-dish Pizza






Another variety, Chicago deep-dish pizza, originated in the 1940s. It features a thick, buttery crust with high edges, generous layers of cheese, and a rich tomato sauce poured on top-reversing the usual order of pizza toppings. The crust is soft and thick, with the pan often greased beforehand to produce a crisp, fried-like texture on the bottom. Cheese stretches are practically a requirement - the more, the better.



California Pizza

Another example is California pizza, which has only been around for about 40 years. Its crust is of medium thickness, soft in texture, and much like its home state of California, it is known for its inclusiveness and unconventional spirit. As long as an ingredient is edible, it can find a place on a California pizza - whether it's salmon, arugula, satay chicken, or even Peking duck - everything can be laid on the dough and baked to perfection. Today, all kinds of wildly creative pizzas are considered part of the California pizza.

	Italy	America
 Toppings	Simple ingredients Typically no more than 1-2 types of meat	Rich and diverse Often loaded with a heavy mix of meats
 Crust	Mostly thin and crispy Usually made only with water, flour, and yeast	Generally thicker and softer Commonly includes sugar, salt, and oil
 Sauce	Made from fresh tomatoes	Rich, slow-cooked tomato sauce





Development Stages of Pizza in China

The future trajectory of any product is often hidden in the traces of its past, and the pizza industry is no exception. By retracing the journey of pizza entering the Chinese market and examining its integration with local market characteristics, dining habits, infrastructure, and consumer behavior, we can predict its future potential.

Introduction Stage (Before 2000):

Pizza Hut entered China in 1990, positioned as a mid-to-high-end Western restaurant, with stores mainly in first-tier cities.

As an imported product, pizza has a relatively short development history in China. In 1990, American pizza brand Pizza Hut opened its first store in Beijing's Dongzhimen area, marking the debut of pizza in China's dining scene and the start of its localization.

At that time, Pizza Hut was seen as a symbol of sophistication - with bright, clean stores, gleaming cutlery, and pizzas were priced at around RMB 22 each, equivalent to about one - sixth of an average worker's monthly salary.



1990: First Pizza Hut store officially opened in Beijing.

During this stage, pizza was perceived as a premium Western dining option, symbolizing a fashionable lifestyle and upscale consumption. Pizza stores were mostly concentrated in first-tier cities, with limited consumer penetration.

Growth Stage (2000–2020)

Value-for-money brands and food delivery models expanded rapidly, and domestic brands rose strongly.

From 2000 to 2020, China's pizza market entered a growth phase, with consumer awareness and fondness for pizza steadily increasing.

According to data, the pizza industry has grown at an average annual rate of over 10% since 2010. Data from Qcc.com shows that as of March 2025, there were 24,800 pizza-related enterprises in China. Even during the pandemic in 2020, 7,585 new pizza-related enterprises were established, a year-on-year increase of 29.3%.

7585 new pizza-related enterprises added in 2020

29.3% YoY increase



Number of Pizza-related Enterprises Registered Since 2015 (Units: Nos.)	
Year	Amount
2015	3140
2016	5762
2017	7218
2018	5939
2019	5865
2020	7585
2021	4585
2022	3246
2023	3855
2024	3185
2025 (as of March 25)	561

Only include businesses classified under the national standard category of "Catering Industry" and whose enterprise name, business scope, or product name contains keywords such as "pizza".

Data source: Qcc.com





During this stage, value-for-money brands and food delivery models expanded rapidly, and domestic brands rose strongly.

In terms of value-for-money brands, chains like Champion Pizza, Magritta Pizza, and Z! Pizza positioned themselves as fast-casual pizza outlets. Their stores had simple decor, fewer seats, and operated with a fast food mindset. Their average per capita spending ranged between RMB 26–32, about half of Pizza Hut's current average of RMB 60, covering a broader consumer base.

They expanded through franchising, enabling rapid scaling. For example, Champion Pizza, through its community-based small store model, expanded quickly. According to Hongcan Big Data, it had opened nearly 3,000 stores by March 2025.

On the food delivery side, brands like Domino's Pizza and ZZ Pizza made significant advances. Domino's Pizza, leveraging its "30-minute delivery guarantee" and diverse product offerings, rapidly captured the domestic market. Its Chinese franchise operator, DPC Dash, successfully listed on the Hong Kong Stock Exchange in 2023.



While the pizza industry is growing, it still faces challenges:

1

First, low frequency of consumption. Despite over 30 years of market education that leads to growing consumer cognition, pizza is still not the primary choice for Chinese consumers compared to noodles, rice dishes, or western fast food represented by McDonald's and KFC.

2

Second, limited dining periods. Pizza consumption is mainly concentrated around lunch and dinner. Operational hours are underutilized, and the high costs associated with rent and labor are not fully offset by traffic or revenue.





Maturity Stage (After 2020)

Market differentiation intensified, with product innovation toward healthier options, penetration into lower-tier markets, and the rise of ready-to-eat foods becoming new growth drivers.

After 2020, China's pizza market entered a stage of mature development. During this phase, product innovation toward health, lower-tier markets, and ready-to-eat (RTE) pizza products emerged as new growth drivers.

In terms of product innovation toward health, the three-year pandemic reshaped the restaurant industry, magnified the Matthew effect (where stronger brands grew even stronger), and changed consumer habits. Demand for healthy eating surged exponentially.



This led to a shift in the pizza market from high-carb, high-calorie offerings toward options that are lower in carbs, richer in protein, and more satisfying in terms of toppings. Additionally, the Mediterranean diet style, characterized by its health benefits, gained popularity. Combinations such as Italian pizza, salads, European-style grilled skewers, Western appetizers, and pasta became favored by consumers for being healthier and more balanced.

Regarding lower-tier market expansion, first-tier cities had high pizza store densities (25 stores per million people), leading to fierce competition and slowing top brand single-store revenue growth to under 5%. In contrast, lower-tier cities (third-tier and below) have a combined population of 1 billion, with rising purchasing power (annual per capita disposable income growing by 8%), but store penetration remains under 20%. As a result, brands like Champion Pizza and Pizza Hut have increasingly focused on lower-tier markets after 2020.

Meanwhile, ready-to-eat pizza also developed rapidly. On the one hand, lifestyle changes drove demand for "ready-to-eat in 5 minutes" products, making microwavable pizzas popular.

Single-store revenue growth

5% ↓

Annual per capita

disposable income **8% ↑**

Store penetration

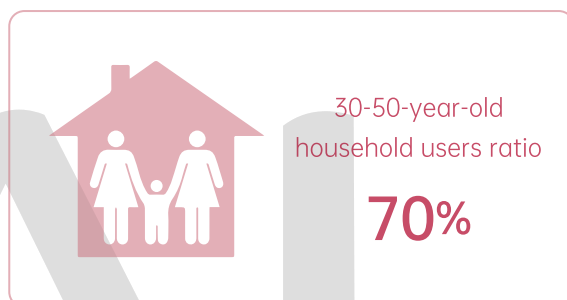
<20%



On the other hand, pandemic effects expanded at-home consumption scenarios. Advances in standardized production in central kitchens reduced ready-to-eat food pizza costs by around 20%. Frozen dough technology extended shelf life to 12 months, and cold chain logistics now cover 98% of counties, with distribution reaching township-level supermarkets, making ready-to-eat food pizza gain long-term development. Players like Domino's Pizza, Hitomorrow, Qiaonong, as well as frozen food brands like Anjoy, Sanquan, and Synear entered the sector.



According to JD.com, online sales of frozen ready-to-eat pizzas grew by 60% in 2024, with 30-50-year-old households accounting for 70% of users. Data from Freshippo shows that ready-to-eat food pizzas have expanded beyond family meals to camping and office snacks, with camping scene consumption reaching 15% in 2024.





The explosion of lower-tier markets and ready-to-eat food stems from supply-demand co-innovation. Lower-tier expansion relies on deep channel development and cost control. Ready-to-eat food depend on technological upgrades and broader consumption scenarios. In the next five years, these two engines are expected to push the pizza industry to exceed RMB 100 billion in scale and further highlight the importance of supply chain building.

Data sources: iResearch "Catering Report on Lower-Tier Markets" (2024), JD Consumer Research Institute "Ready-to-eat Food Trend Insights" (2023)

Market Segmentation & Brand Analysis

Market Segmentation

Product & Pairing Product Innovations



From international brands that initially targeted mid-to-high-end consumers in the 1990s, to local brands making pizza affordable for the masses, and now to emerging brands leveraging mobile internet, dense urban populations, and advanced cold chain logistics based on food delivery, frozen ready-to-eat food and localized product innovation - pizza in China has fused with diverse market elements, innovated across boundaries, and blossomed into a vibrant, multi-faceted competitive landscape.

Major Pizza Brands in China (Partial List)

Brand Name	Per Capita Spending (RMB)	Number of Stores (Nos.)	Number of Cities (Nos.)	Main Store Distribution
Pizza Hut	55	3900+	320+	Nationwide
Champion Pizza	32	2900+	250+	Guangdong, Fujian, Hunan, Hubei, etc.
Domino's Pizza	57	1100+	40+	Shanghai, Jiangsu, Zhejiang, Guangdong, Beijing, etc.
Nine Road Pizzeria	22	630+	130+	Sichuan, Chongqing, Yunnan, Hunan, etc.
Z! Pizza	26	620+	90+	Jiangsu, Fujian, Zhejiang, etc.
ZZ Pizza	29	600+	80+	Guangdong, Hubei, Hunan, etc.
TA's Time Pizza	22	410+	160+	Hebei, Shandong, Northeast China, etc.
Magritta Pizza	26	380+	60+	Fujian, Shandong, etc.
Three Bears Pizza	25	340+	100+	Sichuan, Gansu, Shaanxi, Yunnan, etc.
Papa John's Pizza	58	280+	30+	Shanghai, Beijing, Jiangsu, etc.
Bigpizza	70	250+	40+	Beijing, Hebei, Shandong, etc.
Lacesar	61	150+	10+	Guangdong, Shanghai, etc.
City 1+1 Pizza	37	150+	30+	Jilin, Heilongjiang, Inner Mongolia, etc.
ai8c	26	100+	20+	Jiangsu, Zhejiang, Shandong, etc.
Mua Pizza	31	90+	20+	Zhejiang, etc.
101's Pizza	55	90+	20+	Dalian, Northeast China, etc.
Origus	50	50+	20+	Beijing, Hebei, etc.
Niunan Handmade Pizza	48	50+	20+	Jiangxi, Jiangsu, etc.
PizzaMarzano	93	40+	10+	Shanghai, Guangdong, etc.
Tube Station Pizza	83	30+	~6	Beijing

Data sources: Hongcan Big Data, brand public information, statistics as of March 2025.

Market Segmentation

From an operational model perspective, pizza brands in China can mainly be categorized into fast food and casual dining.

From a consumption scenario perspective, pizzas are consumed via dine-in, food delivery, and by purchasing frozen ready-to-eat products for home, camping, and other occasions.

This section classifies the pizza industry into three market segments: fast-food pizza, casual dining pizza, and frozen ready-to-eat pizza.

Fast-Food Pizza: Expanding Market Share with Value-for-Money, Small-Format Stores, and Food Delivery Capabilities

Fast-food pizza accounts for approximately 65% of the total pizza market.

Brands like Champion Pizza, Domino's Pizza, Z! Pizza, and Magritta Pizza belong to this fast-food pizza segment, focusing on value-for-money offerings, with an average per capita spending between RMB 22-58.

Domino's Pizza, leveraging its "30-minute delivery guarantee" and diverse product offerings, rapidly captured the domestic market. Its Chinese franchise operator, DPC Dash, successfully listed on the Hong Kong Stock Exchange in 2023. Z! Pizza and Magritta Pizza focus on solo dining and food delivery scenarios, with each brand operating over 300 stores.

Taking Champion Pizza as an example to explain the development of fast-food pizza. Champion Pizza takes the business model of direct operation + franchise. From 2018 to 2022, it expanded at a rate of around 300 stores per year, mainly in first-tier and new first-tier cities, with Shenzhen hosting over 330 directly operated stores.

Champion Pizza becomes the local pizza brand with the most widely spread stores, which benefits from the following three aspects:

Fast food pizza market share

65%





Pricing-Average spending around RMB 32, almost half that of Pizza Hut and Domino's Pizza. White-collar professionals, singles, as well as families with children, emphasizing value-for-money.

Location Strategy-Stores mainly located in residential neighborhoods, streets, or underground mall levels to optimize rental costs and enable dense last-mile food delivery coverage.

Marketing-Focused on offering discount vouchers via food delivery platforms instead of IP collaborations. According to Meituan's 2024 "Food Delivery Trend Report", 75% of pizza delivery orders are solo dining orders. 45% of orders are placed during nighttime (20:00-24:00).

There are also challenges for Champion Pizza. Despite having three times as many stores as Domino's Pizza China, its market share and profitability only slightly lead, primarily due to a low-margin, high-volume strategy. Pizza products tend to be highly homogeneous, making product differentiation difficult. Overall, success in the fast-food pizza segment relies on operational efficiency and the ability to penetrate multiple consumption scenarios to achieve total cost leadership.



Solo dining order ratio **75%**



Nighttime order ratio **45%**



Casual Dining Pizza: Attracting Consumers with Pleasant Environments, Signature Products, and Rich SKUs

Casual dining pizza accounts for approximately 25% of the total pizza market.

Brands like Pizza Hut, Lacesar, Papa John's, PizzaMarzano, Bigpizza, and Origus are part of this casual dining pizza category. These brands attract consumers through elegant dining environments, unique product offerings, and a wide product range (SKUs). Average per capita spending typically falls between RMB 50-100 which is higher than fast-food pizza.



Casual Dining Pizza
Market Share

25%

Taking Lacesar as an example to explain the attraction of signature products of casual dining pizza. Launched in 2009 as the "creator of durian pizza", Lacesar is known as the "king of durian pizza". Maintained a first-mover advantage for 5-6 years by Lacesar, many brands including Pizza Hut, Domino's Pizza, Champion Pizza, and Bigpizza started offering durian pizzas after 2015. This led to a phenomenon where "ordering pizza almost meant ordering durian pizza".

In 2024, YumChina's CEO Joey Wat reported that one in four pizzas sold by Pizza Hut China was a durian pizza. In 2024 alone, Pizza Hut sold nearly 30 million durian pizzas.





Key Events Related to Durian Pizza Launches

Brand	Year	Event
Lacesar	2009	The brand was established with the pioneering launch of durian pizza
Champion Pizza	2015	It claimed that its durian pizza used pure flesh from Malaysia's Sultan King D24 golden durian
Pizza Hut	2015	The durian pizza was first piloted in Guangdong and expanded nationwide in 2016
Bigpizza	2017	Created the "world's largest durian pizza" (World Record Association)
Domino's Pizza	2018	The brand launched durian pizza, and through a mini-program game, gave away 3,000 free durian pizzas and offered 6,000 half-priced durian pizzas

Data sources: Public information consolidation

According to Hongcan Big Data, Pizza Hut operated over 3,900 stores nationwide by March 2025. Papa John's Pizza has been rapidly revitalizing its brand image to attract younger consumers, with its "budget-friendly pizza" campaign gaining popularity. Bigpizza and Origus have focused on self-service buffet models, while PizzaMarzano has pursued a differentiation strategy with thin-crust Italian-style pizza.



In addition to pizza, casual dining pizza brands often offer steaks, pasta, salad, and sandwiches, primarily targeting family gatherings and business dining occasions. According to a Hongcan survey: 60% of casual dining pizza consumption in 2024 was for gatherings among friends and families. 20% was for business lunches.

Friend & Family
Gatherings



Business
Lunches



Frozen Ready-to-Eat Pizza: Rapid Growth Driven by Supply Chain Innovations and Scenario Diversification

Key Companies & Products of Frozen Ready-to-Eat Pizza (Partial List)

Company Name	Brand	Product	Specification	Price (Platform)
Shenzhen Bliss Cake Food Co., Ltd.	Bliss Cake	Classic Durian Pizza	180g/box	RMB 28.3 (JD.com)
Fujian Xinmeichen Food Co., Ltd.	NIUSAZZ	Cheese Boat Pizza	265g/box	RMB 29.9 (JD.com)
Hangzhou Daxidi Technology Co., Ltd.	Hitomorrow	Bacon & Potato Pizza	8 inches/box	RMB 59.9 (JD.com)
Zhejiang Kaixi Food Technology Co., Ltd.	Kassy Steak	Cheese Bacon Pizza	540g/box	RMB 15.63 (JD.com)
Qiaonong Food (Shanghai) Co., Ltd.	Qiaonong	Fruit Pizza	285g/box	RMB 18.4 (JD.com)
Shanghai Chaoxiangyuan Food Co., Ltd.	CXC Food	Durian Pizza	320g/box	RMB 35.8 (JD.com)
CP Food Enterprise (Qinhuangdao) Co., Ltd.	CP Food	Italian Cheese Mini Pizza	600g/box	RMB 31.9 (JD.com)
Hangzhou Xichu Beike E-commerce Co., Ltd.	Chef Baker	Black Pepper Beef Pizza	140g/box	RMB 19.98 (JD.com)
Sanquan Food Co., Ltd.	Sanquan	Hawaiian-style Pizza	90g/bag	RMB 10.98 (JD.com)
Shanghai Fengwei Industrial Co., Ltd.	ARTSHOW	Pizza Crust	720g/box	RMB 23.8 (JD.com)
Shanghai Pulmuone Food Co., Ltd.	Pulmuone	Savory Sausage Thin Crust Pizza	270g/box	RMB 39.9 (JD.com)
Guangzhou Restaurant Group Likofu Food Co., Ltd.	LIKOFU	Cheese Boat Steamed Pizza	85g/bag	RMB 12.45 (JD.com)
Dr.Oetker Food (Taicang) Co., Ltd.	DR. OETKER	Mushroom Pizza	365g/box	RMB 54.8 (JD.com)
Angel Yeast Co., Ltd.	Bakerdream	Pizza Crust	720g*6/box	RMB 31 (JD.com)
Beijing Huahua Shijie Food Technology Co., Ltd.	Foodvio	Meat Lover's Pizza	290g/box	RMB 72.9 (JD.com)
Fujian Xinmeichen Food Co., Ltd.	Meichen	Premium Beef Cheese Pizza	85g*10/box	RMB 58 (Tmall)
Fuzhou Shangyu Food Co., Ltd.	Magritta	Bacon Pizza	110g/box	RMB 10.9 (Tmall)
Zhuhai Xinyang Food Co., Ltd.	D·NUO	Five-Spice Beef Grilled Pizza	180g/box	RMB 79 (Tmall)
Nanjing Mino Food Co., Ltd.	Shizhedao	Orleans Chicken Pizza	250g/box	RMB 39.76 (Tmall)
Hangzhou Liyu Food Co., Ltd.	Chanjiang	Sausage Pizza	190g/box	RMB 39.9 (Tmall)
Shandong MeiHuan Food Co., Ltd.	MeiHuan	Beef Pizza	260g*2/bag	RMB 36 (Tmall)
Henan Jinweikang Lvyuan Food Co., Ltd.	Bei Xiao Jie	Pineapple Fruit Pizza	7 inches/box	RMB 15.8 (Tmall)

Data sources: Public information consolidation

Currently, frozen ready-to-eat pizzas account for approximately 10% of the overall pizza market in China.

Since 2020, fueled by the rise of the "stay-at-home economy", frozen ready-to-eat pizzas have significantly outpaced the broader industry in growth. In 2023, the market size reached approximately RMB 4.5 billion, representing a 40% year-on-year increase, far exceeding the growth rates of freshly made pizzas (15%) and the overall frozen food sector (12%). It is projected that the market will exceed RMB 8 billion by 2025 and could reach RMB 12 billion by 2027, positioning frozen pizza as one of the most dynamic segments within the frozen food category.

2023 market size
approximately
RMB **4.5** billion

40%
YoY increase

Three key driving factors for the growth of frozen ready-to-eat pizzas

01

Consumption
Habits

Post-pandemic, "stockpiling demand" has become normalized in households, with users aged 30–50 accounting for more than half of the consumer base.

02

Technological
Advancements

Breakthroughs in frozen dough freshness-locking technologies have allowed frozen pizzas to closely replicate the taste of freshly baked products, greatly improving consumer acceptance.

03

Cost Advantages

Ready-to-eat pizzas enjoy gross margins exceeding 50%, significantly higher than freshly made pizzas (30–35%).

Domestic brands such as Hitomorrow, Qiaonong, Anjoy, Kassy Steak, and CXC Food have emerged as leaders in the frozen pizza space. The market has developed a differentiated competition pattern covering low-end (RMB 10–20), mid-range (RMB 20–40), and high-end (RMB 40–60) price segments.

Low-end

RMB 10–20

Mid-range

RMB 20–40

High-end

RMB 40–60



Hitomorrow focuses on "affordable fast consumption", targeting convenience stores with its RMB 9.9 "microwave for 6 minutes" series (6-inch mini pizza), aiming for the solo dining market. Qiaonong positions itself in the high-end segment, partnering with Sam's Club and Freshippo, and developing air fryer-compatible pizza crusts. Its signature product includes the RMB 49.9 "Black Truffle Beef Pizza". Anjoy leverages its channel strengths for supply chain integration, collaborating with DDL on customized products, such as the RMB 19.9 "Fresh-Lock Thin Crust Pizza", featuring a low-margin, high-volume model. CXC Food focuses on deep regional penetration, targeting shelf placements in supermarkets such as Walmart and YH, with the RMB 29.9 "Orleans Chicken Pizza" as a representative product.



The development pattern of "online explosion, offline diversification" for frozen ready-to-eat pizzas has taken shape. Online channels (accounting for about 40%) include livestream e-commerce, fresh produce platforms, and traditional e-commerce sites. Offline channels (accounting for about 60%) include supermarkets, convenience stores, camping sites, and campus stores.



Frozen ready-to-eat pizza is rapidly evolving from a substitute product into a mainstream consumer choice. Its explosive growth is essentially the result of the synergy between supply chain innovation and scenario diversification.

Mainstream Choice



Substitute Product



NIUSAZZ Cheese Boat



Sanquan Fresh Microwave Pizza



Qiaonong Triangle Pizza



Shanwei Cartoon Bunny-Shaped Pizza

Product & Pairing Product Innovations

In recent years, competition in China's pizza market has intensified. Both international brands such as Pizza Hut, Domino's Pizza, Papa John's, as well as domestic brands like Lacesar, Champion Pizza, and Bigpizza, have actively pursued product innovation to enhance differentiation and competitiveness. This section summarizes trends over the past five years from two perspectives - pizza product innovation and pairing product innovation - to provide insights into the pizza industry's future direction.

Pizza Product Innovation

Innovation in Pizza Crusts: From Traditional to Diversified

Brand	Crust Innovations	Representative Products
Pizza Hut	First launch of "cheese-filled crust" and "durian half-and-half thin crust"	Golden Pillow Durian Bobo Pizza
Domino's Pizza	Introduction of "double-layered crust" and "air fryer-special thin and crispy crust"	Double Cheese Pizza
Lacesar	Fresh made hand-tossed crusts, emphasizing "no pre-made dough"	Fruit-Burst Durian Pizza
PizzaMarzano	Use of premium Italian 00 flour with traditional kiln baking, targeting the high-end segment	Black Truffle Beef Pizza
Champion Pizza	Focus on thicker crusts with extra cheese to cater to lower-tier markets	Super Supreme Pizza
Papa John's Pizza	Development of whole wheat, low-fat crusts for health-conscious consumers	Reduced-Calorie Pizza

The pizza crust is a fundamental element for product differentiation, making crust innovation become one of the most visible and competitive areas in pizza product development. Pizza brands have placed great emphasis on diversifying and innovating their crust offerings.

For example, Pizza Hut offers nearly 10 types of crusts for its standard pizzas, and in recent years has launched new options such as Cheese Angus Beef Rolls, Golden Award Cream Cheese Rolls, and Durian Mochi Rolls, enabling dozens of flavor combinations. Domino's Pizza provides around 40 pizza varieties, with nearly 20 crust options, allowing for more than 600 possible combinations - an impressively rich offering.



Image source: Domino's Pizza Mini Program



Pizza crust innovation generally falls into two categories. The first is by adding toppings to the crust edges or using double-layered crusts (such as cheese, durian, egg yolk, sausage, char siu, etc.) to enhance flavor complexity - among which cheese is used most frequently. The second is by upgrading the dough base itself, for example by adding ingredients like yogurt or butter to create a softer, more delicate texture.

Therefore, innovation in pizza crusts is closely tied to dairy companies supplying cheese, butter, yogurt, cream, and similar products. For example, Pizza Hut's 2025 "New Year Happy Crust" incorporates pistachio paste and mixed nuts, while also using imported New Zealand cream cheese to further enrich flavor and texture.

Looking at crust innovations from mainstream pizza brands over the past five years, four major trends of health-consciousness, freshly made, convenience and emotional value emerge:

Health-consciousness

Low-fat, whole wheat, and gluten-free crusts are increasingly favored. For example, Papa John's Pizza launched the industry's first crust-free "Reduced-Calorie Pizza".

Freshly Made

Emphasizing hand-tossed, freshly made dough with "no pre-made dough", aligning with consumers' growing preference for artisanal, freshly prepared foods.

Convenience

Crusts designed for compatibility with microwaves, air fryers, and other household appliances to improve convenience and flavor retention for pizza food delivery and ready-to-eat products.

Emotional Value

Infusing products with positive symbolism and auspicious messaging to resonate emotionally with consumers - for example, Pizza Hut's "Prosperity Crust" and "New Year Happy Crust", whose names alone evoke festive vibes.



Data sources: Public information consolidation

New Pizza Crusts Launched by Brands in Recent Years

Brand Name	New Pizza Crusts
Pizza Hut	Money Drawing Crust, New Year Happy Crust, Golden Award Cheese Cream Crust, Golden Award Cheese Egg Yolk Crust, etc.
Domino's Pizza	Volcano Crust, Bursting Pumpkin Double-Layer Crust, Black Gold Honey Char Siu Crust, etc.
Champion Pizza	Yogurt Cheese Crust, Golden Salted Egg Yolk Crust, Cheese Stick Crust, etc.



Pizza Hut – New Year Happy Crust



Domino's Pizza – Volcano Crust



Papa John's – Reduced-Calorie Pizza



Pizza Toppings Innovation: From Classic to Adventurous

Innovation Direction	Representative Brands	Representative Products	Market Performance
Localization	Lacesar	Spicy Crayfish Pizza	A hit product in South China
Cross-brand Collaborations	Pizza Hut × The Palace Museum	Lucky Sausage Pizza	Generated widespread discussion on social media
Plant-based	Papa John's Pizza	Plant-based Meat Pizza	Preferred by environmentally conscious consumers
Dessert-inspired	Domino's Pizza	Chocolate Marshmallow Pizza	Popular among children

Just like dumplings can hold anything, or hot pot can cook everything, pizza is known for its versatility in toppings. Innovation in pizza toppings is one of the most active areas of product development.

Over the past five years, toppings innovation has primarily focused on four major directions: regional specialty ingredients, cultural heritage elements, fruit-based ingredients, and healthy new ingredients. These include spicy Sichuan flavors, Cantonese sausage, Yunnan and Guizhou litsea pungens hemsl, and other regional specialties. Local dishes like crayfish, Peking duck, Hunan spicy pork, and Korean kimchi, as well as a variety of fruits incorporated into pizza toppings and flavor innovations.

For example, PizzaMarzano, positioned as a "premium handcrafted Italian thin-crust pizza" brand, celebrated its 15th anniversary in China in 2021 with a promotional campaign emphasizing themes like "Thinner is Better", "Mastering the Art of Thinness", "Light and Thin Lifestyle", and Italian-style leisure. They claimed that key toppings like buffalo mozzarella, tomato sauce, and Parma ham were all sourced from Italy, with traditional preparation methods that preserved the art of hand-tossed Italian pizzas.



PizzaMarzano



Lacesar

PizzaMarzano has also continued incorporating local Chinese ingredients to develop "Guochao-style" (Chinese trend) pizzas. In early 2022, they launched five new Guochao-inspired products, including Crispy Peking Duck Pizza and Fish-flavored (with fish) Shredded Pork Pizza. Additionally, they introduced some American elements with products like Hawaiian Pizza and American Sausage Pizza.

Similarly, Lacesar has amplified its use of "fruit elements". In addition to reinforcing its position as the "pioneer of durian pizza", the brand has launched various other fruit-based pizzas, including: Hawaiian Pizza, Summer Pineapple Italian Meat Sauce Pizza, Avocado Potato Wedge Scrambled Egg Pizza. They also offer fusion creations like BBQ Chicken Pizza using a mix of American BBQ sauce and Thai chili sauce, and American Potato Bacon Pizza.



DADONG and Sam's Club jointly launched an "Peking Duck Pizza", with the tagline: "A pizza with no 'seven slices' (wordplay on 'deception'), featuring real Peking duck, authentically roasted with heritage techniques".



Pizza Pairing Product Innovations

The overall dining experience of enjoying pizza is not only influenced by the pizza itself but also by complementary offerings such as pasta and other main dishes, snacks like fried chicken or fries, as well as salad, soup, dessert, and beverages. These pairing products are typically priced affordably, making them easy add-ons to accompany pizza or enjoyable as standalone meals, while also increasing consumption frequency for pizza brands. To that end, pizza brands have pursued diverse and innovative pairing products based on consumption trends, core customer groups, brand positioning, and seasonal marketing demands.

Hamburgers/Pasta: Supplementing Staple Food Options

Brand	Innovation	Representative Products	Positioning
Pizza Hut	Pizza-flavored Hamburgers	Honey-glazed Chicken Thigh Burger	Product Matrix Expansion
Product Matrix Expansion Pizza	Black Pepper Beef Pasta	Combo Meal	Essential Demand in Lower-tier Markets
Magritta Pizza	Tomato Meat Sauce Pasta	Children's Meal Standard	Family Customer Group

Pizza brands are showing a trend of menu integration overall, with pasta and hamburgers appearing in the main course sections to supplement customers' staple food choices.

For example, Pizza Hut has launched a variety of pizza-inspired burgers, such as the Golden Triple-crispy Juicy Chicken Burger, Honey - glazed Chicken Thigh Burger, Angus Beef Burger, Cheese Wagyu Supreme Burger, and Spicy Chicken Thigh Burger. These hamburgers not only offer a wide range of choices but also feature distinct textures and ingredients. For instance, the Golden Triple - crispy Juicy Chicken Burger combines a crispy outer layer, juicy chicken, and fresh lettuce, delivering a triple "crunch" sensation. The Honey - glazed Chicken Thigh Burger is known for its large, tender chicken cut and rich lemon - based flavor, offering a savory - sweet balance with layered taste. The Angus Beef Burger features a juicy beef patty paired with onions and pickle cucumbers. The Cheese Wagyu Supreme Burger includes beef slices, cheese, mushrooms, and a fried egg among its rich toppings.

Additionally, Pizza Hut has introduced various combo meals, such as a RMB 69 set including a hamburger, pizza, pasta, and a drink, and a RMB 29.9 set with a hamburger and pizza, catering to consumers' diverse needs and demonstrating Pizza Hut's innovation and flexibility in the market.





Fried Chicken: From Side Dish to Star Product

Brand	Innovation	Strategies
Pizza Hut	Golden Crispy Fried Chicken	Pizza + Fried Chicken Combo Meals to Increase Average Order Price
Champion Pizza	Garlic Soy Sauce Fried Chicken	Hit Product in Lower-tier Markets, High Value-for-money
Lacesar	Air-fried Oil-free Chicken	Health-conscious Pairing, Popular among White-collar Professionals
Papa John's Pizza	American Spicy Fried Chicken	Classic American Style, Stable Sales

From the pairing of fried chicken products across brands, it is evident that health orientation and distinctive flavor innovation are the main drivers, with selling points such as low-fat, air-fried, oil-free options attracting consumers interested in healthier choices. Garlic-flavored and American spicy variations stand out as memorable flavor innovations.



French Fries: From Standard Side to Creative Upgrade

Brand	Innovation	Highlights
Domino's Pizza	Cheese Meat Sauce Fries	Star Product for Food Delivery, High Gross Margin
Pizza Hut	Meat Sauce Cheese Crinkle-cut Fries	Paired with Pizza Combos to Enhance Perceived Value
PizzaMarzano	Truffle Cheese Fries	Premium Snack Option to Elevate Brand Image
Bigpizza	Self-serve Fries	Unlimited Refills, Popular among Family Customers

From the pairing of French fries across brands, it can be seen that high-value toppings and condiments like cheese and black truffle are being incorporated to enhance the product's premium appeal, while concepts like Bigpizza's self-serve model enhance the customer's sense of freedom and selection experience.



PizzaMarzanos Truffle Cheese Fries

Beverages: From Carbonated Drinks to Freshly Made Tea Drinks

Brand	Innovation	Highlights
Pizza Hut	Cheese Foam Tea	Co-branded with Heytea to launch "Cheese Oolong Tea" and "Grape Berry Tea"
Pizza Hut	White Peach Oolong Sparkling Water	Promoting Zero-sugar, Low-calorie Concepts Aligned with Health Trends
Lacesar	Explosive Lemon Tea Series, Coconut Americano	Grease-cutting Pairings for White-collar Afternoon Tea
Domino's Pizza	Cola Slush	Classic Cola Turned into a Slush, Launched as a Summer Limited Offering
Champion Pizza	Frozen Lemon Cola	Cantonese Flavor, Limited to the South China Region
Bigpizza	Self-serve Yogurt Drinks	Attracting Children's Customers

With the booming development of freshly made beverages and the growing consumer pursuit of healthy eating, pizza brands are transitioning from mainly offering carbonated drinks to introducing freshly made tea beverages. Milk tea, fruit tea, and Italian-style coffee are increasingly frequent on pizza menus. Aligning with the trend of price-to-quality ratio, and backed by a strong freshly made beverage supply chain, some brands such as Bigpizza and Z! Pizza have also introduced self-serve drinks to boost consumer engagement.





Consumer Demand Insights

Consumer Composition

Core Factors for Choosing Dine-in Pizza

Core Factors for Choosing Delivery Pizza

Core Factors for Choosing Frozen Ready-to-eat Pizza

In this chapter, the consumption behavior shifts in China's pizza market are analyzed from four dimensions: consumer composition, dine-in demand, food delivery preferences, as well as logic behind choosing frozen ready-to-eat pizzas. Overall, consumer preferences reflect a strong focus on value for money, with equal emphasis on taste and quality, diverse consumption scenarios, and an increasing appreciation for emotional value. Today's consumers seek food that is not only healthy and flavorful, but also emotionally engaging, enjoyable, and reasonably priced-raising the bar for operational performance across pizza brands.

Consumer Composition

Age and Gender Distribution

Age	Proportion	Core Consumption Channel	Consumption Characteristics
Teenagers & Young Adults (Under 19 and 20–39 years old)	60%	Food Delivery (Approximately 70%)	Student Group (primary/secondary school, university): Constitute a major customer segment, typically favoring convenient, affordable options with a wide variety of flavors. Young Professionals (20-40 years old): Primarily located in Tier 1 and Tier 2 cities, tend to consume in scenarios such as solo dining or small social gatherings.
Middle-aged Group (40–59 years old)	35%	Dine-in (Approximately 60%)	Primarily composed of families, this group tends to choose pizza as a convenient choice for casual get-togethers. While their consumption frequency is relatively low, they place a stronger emphasis on ingredient quality and health considerations.
Elderly Group (60 years old+)	5%	Frozen ready-to-eat (Approximately 50%)	Consumption frequency is significantly lower compared to younger consumers, but in Tier 1 cities, some old people are gradually accepting pizza as a convenient dining option.

From the consumer age distribution perspective, teenagers and young adults are the main pizza consumption groups. They prefer convenient, diverse food choices, are highly receptive to Western fast food, often place orders via food delivery platforms, and favor adventurous flavors, such as snail rice noodle pizza.



The middle-aged demographic serves as a secondary consumer base, generally viewing pizza as a convenient leisure food suited to family-friendly dining occasions. This group tends to place greater emphasis on the quality and healthfulness of pizza products. Notably, a survey conducted by the China National Food Industry Association in early 2025, involving 3,000 parents, revealed that 78.6% of Chinese parents perceive pizza as an "unhealthy Western fast food," while 65.3% express concerns that ingredients such as cheese and processed meats may negatively affect their children's health.

The senior consumer segment remains small, but in Tier 1 cities, an increasing number of elderly consumers are beginning to accept pizza as a convenient dining choice, showing preference for ready-to-eat options, and paying attention to low-sugar, low-fat products.



In response to consumer health concerns, offering healthier options such as whole-wheat crusts and reduced-fat cheese, along with transparent nutritional labeling, is likely to become a basic strategy for pizza brands.

Regarding gender composition, female consumers account for approximately 58%, with purchasing decisions more focused on health and visual appeal. While male consumers account for about 42%, placing greater emphasis on portion size and value-for-money.

Female Consumers

58%



Male Consumers

42%



Consumer Type

Consumer Type	Core Needs	Typical Behaviors
Students	Value-for-money, convenience	Group ordering for food delivery, opting for RMB 19.9 meal deals
White-collar Professionals	Quality, health	Choosing simple lunch combos, often pairing with salad or American coffee
Family Customer Group	Group gatherings, child-friendly	Dine-in on weekends, ordering "family-friendly combo meals"
Single Young Adults	Solo dining, convenience	Choosing frozen ready-to-eat pizzas, microwaving for quick meals



Core Factors for Choosing Dine-in Pizza

Flavor Innovation and Sense of Quality

Flavor innovation and product quality perception are key factors influencing consumers' dine-in pizza choices. In terms of flavor innovation, consumers are no longer satisfied with traditional cheese or sausage flavors, but seek diverse and personalized taste experiences. For instance, distinctive offerings such as durian pizza and crayfish pizza are highly popular among consumers. Authentic Italian flavors, seafood/fruit pizzas, and localized adaptations like bacon pizza and kimchi pizza also serve as core attractions for consumer experimentation.

Regarding quality, the freshness of ingredients (such as freshly made dough and imported cheese) directly impacts purchasing decisions, and the use of seasonal ingredients (like asparagus and strawberries) enhances product appeal. Details such as the crispiness of the crust and the stretchiness of the cheese play critical roles in consumers' pizza quality judgment. In cooking techniques, handmade fresh pizzas-valued for their natural ingredients and minimal additives - is especially favored by consumers.



Price Sensitivity and Value-for-money

Consumers are increasingly price-sensitive, making value-for-money a critical factor in choosing pizza products. Amid the current economic climate, price weighs significantly in the pizza decision-making process, with consumers generally pursuing a balance between affordability and quality.

In 2025, Pizza Hut introduced a new menu featuring across-the-board price cuts on 30 items and adopted a "one fixed price" strategy, which successfully attracted a large number of new customers. This underscores the importance of offering affordable yet quality-assured products, enabling consumers to enjoy desirable cuisines within limited budgets.

Service Efficiency and Dining Experience

Quick serving times and responsiveness to customization requests are key factors to boosting repurchase rates, especially in family gatherings and holiday scenarios.

When it comes to restaurant environment preferences, notable differences exist between consumer groups: young consumers favor trendy designs, whereas family groups prefer cozy and comfortable spaces.





Location and Convenience

Restaurants located near office areas, shopping districts, or residential communities enjoy higher customer flow. Although store density in lower-tier markets is only about one-third that of Tier 1 cities, the growth potential is significant. Data shows that between 2016 and 2022, the compound annual growth rate (CAGR) of pizza consumption in Tier 3 and lower-tier cities reached approximately 10%, surpassing the 7.6% in Tier 1 cities and 9.1% in new Tier 1 cities.



In the whole, the priority factors influencing consumers' dine-in pizza choices are: flavor & quality > value-for-money > service & experience. Brands need to strengthen competitiveness through localized innovation, health-oriented transformations, and precise regional operations (e.g., enhancing experiential scenarios in Tier 1 cities, optimizing supply chains in lower-tier markets).

Core Factors for Choosing Delivery Pizza

Delivery Efficiency and Convenience

For food delivery, consumers are highly sensitive to food delivery times, and pizza food delivery is no exception. A high rate of delayed deliveries directly increases order cancellations and negative reviews. Brands should enhance efficiency by optimizing the delivery distance (3-5 km) and utilizing intelligent dispatch systems.



Product Quality and Hygiene

Quality control in aspects such as heat retention and packaging during pizza food delivery is crucial for encouraging repeat purchases, as it directly impacts the taste experience upon consumer receipt. Regarding food safety, standardized processes such as sealed packaging and contactless delivery have become basic requirements.

In terms of ingredient freshness, consumers are increasingly demanding high-quality ingredients like freshly made dough and imported cheese. For hygiene assurance, some brands have implemented "transparent kitchens" with live-streaming of kitchen operations to build consumer trust.



Price Sensitivity and Set Meal Design

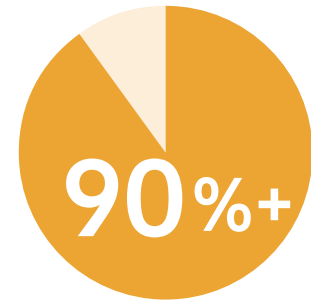
In terms of per-order spending, price remains a key factor in consumers' pizza food delivery decisions. Brands can attract price-sensitive users through promotions like discounts on bulk purchases or "buy one, get one half off".

Regarding value-for-money perception, consumers tend to prefer combo meals that include a "main dish +snack+beverage". To maintain profitability, the cost of bundled items should be controlled within 30% of the selling price.



Online Experience and Information Transparency

At present, over 90% of consumers have access to online ordering, digital menus, and real-time order tracking. Streamlined and user-friendly platforms significantly boost conversion rates. "Recommendation content" on platforms like Tiktok and Rednote, as well as other high ratings on food delivery apps (above 4.8 stars), also strongly influence consumers' decision-making.



Online ordering, digital menus, and real-time order tracking

Regional and Consumption Scenario-based Differences

Consumers in Tier 1 and new Tier 1 cities emphasize more on brand reputation (e.g., classic American pizzas from Pizza Hut) and diverse dining scenarios (such as overtime meals and late-night snacks), with nighttime orders accounting for over 25%.

Nighttime Orders

25%+



In lower-tier markets, the proportion of family orders has notably increased. Large-sized pizzas (12 inches and above) and "buy one, get one free" promotions are particularly popular. Stores can boost repeat purchase rates through community-based operations (e.g., group orders via WeChat groups).

In summary, the priority factors for consumers choosing pizza food delivery are: delivery efficiency > product quality > price & value-for-money. Brands should enhance competitiveness through supply chain optimization, smart technology applications and targeted marketing - for example, strengthening nighttime delivery services in Tier 1 cities and promoting family meal combos in lower-tier markets.



Core Factors for Choosing Frozen Ready-to-eat Pizza

Convenience and Time Efficiency

The instant-ready nature of frozen pizzas, requiring only 10-15 minutes of heating (via oven or microwave), fits perfectly with fast-paced lifestyle, making them a preferred meal solution for families and single-person households. No need for preparation or tedious cleanup makes frozen pizzas particularly suitable for busy professionals and consumers with limited cooking skills.



Flavor Diversity and Innovation

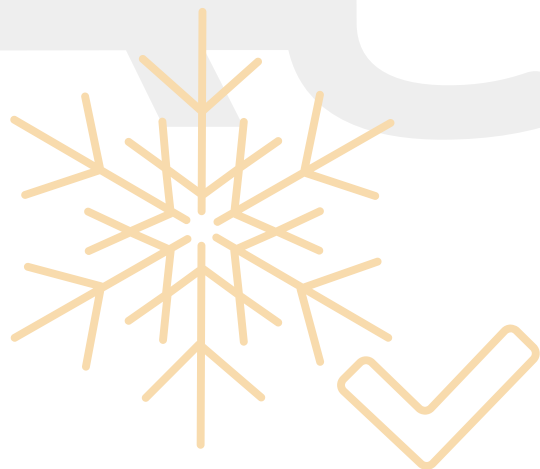
From classic Margherita to localized flavors such as durian and bacon pizzas, the frozen ready-to-eat pizza product line spans traditional Italian, vegetarian, and premium segments, catering to varied consumer preferences.

In lower-tier markets, localized innovations like kimchi pizza are rapidly gaining traction and becoming key points of differentiation.

Price Sensitivity and Value-for-money

The unit price of frozen ready-to-eat pizza generally ranges from RMB 15 to RMB 50, which is significantly lower than that of food delivery pizzas (where the average ticket price in Tier 1 cities is around RMB 75), offering strong cost advantages.

Brands attract price-sensitive consumers through promotions such as "buy one, get one free" and "spend to get discount", with lower-tier markets showing a preference for value-for-money products priced below RMB 30.



Health and Nutritional Balance

Consumers of frozen ready-to-eat pizzas are increasingly concerned about calories and additives, driving brands to launch healthier options such as whole wheat crusts, reduced-fat cheese, and low-sodium sauces.

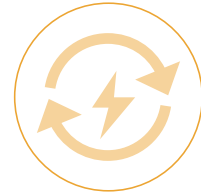
Almost every consumer checks ingredient labels, and transparent labeling (e.g., indicating non-GMO ingredients and zero trans fats) as well as clean-label initiatives are critical to building consumer trust.



Packaging Appeal and Environmental Responsibility

Younger consumers prefer "Guochao" (national trendy) packaging designs, with brands enhancing product attractiveness through visual innovation.

The use rate of biodegradable packaging materials (such as corn starch-based boxes) is on the rise, aligning with the values of environmentally conscious consumers.



In summary, the priority factors influencing consumers' frozen ready-to-eat pizza purchases are: convenience > flavor diversity > value-for-money. Brands must enhance competitiveness through localized innovation, health-focused product upgrades, and refined channel operations - for example, strengthening e-commerce live-streaming in Tier 1 cities and expanding community group-buying initiatives in lower-tier markets.

Potential Opportunity Insights

Market Growth Potential

Product & Technology Innovation Potential

Scenarios & Marketing Innovation Potential



Market Growth Potential

Food Delivery Remains the Growth Engine

From 2025 to 2027, China's pizza market is expected to maintain a high compound annual growth rate (CAGR) of 15.5%, driven primarily by the rising penetration of food delivery services and the release of consumption potential in lower-tier markets.

2025-2027
China's Pizza
Market CAGR

15.5%



As of 2022, the online share of the pizza market was over 58.1%, surpassing offline channels. Over the next five years, delivery services - especially nighttime food delivery and family meal bundles - are projected to become the main growth engines. According to Domino's Pizza China IPO prospectus, the pizza delivery market size is expected to reach RMB 37.4 billion by 2025, accounting for 60% of the overall pizza market.

2025 Pizza Delivery Market Size Expected

RMB **37.4** billion



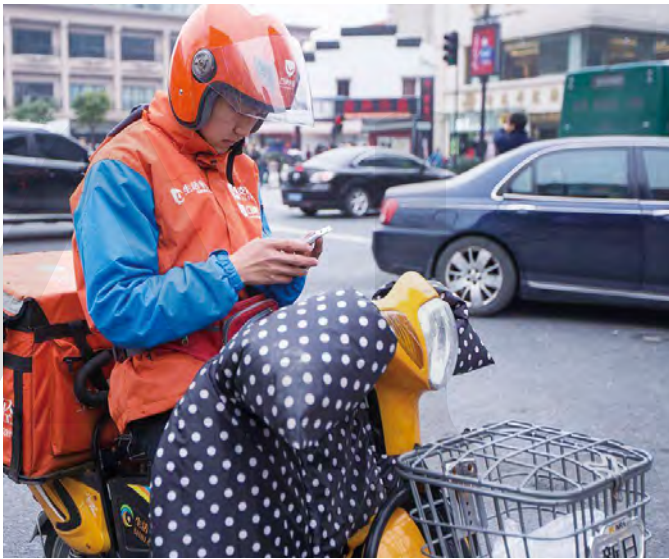
Domino's Pizza China, which focuses on food delivery, plans to open 800 new stores by 2026, with a focus on expanding into second-tier and third-tier cities. Leveraging its "30-minute guaranteed delivery" logistics system, Domino's Pizza aims to increase its penetration rate in lower-tier markets to 40%.

Explosive Growth Potential in Lower-tier Markets

Pizza Enterprises Distributionby City Tier (Unit: Nos.)	
City Tier	Stock
Tier 1	1601
New Tier 1	4127
Tier 2	5520
Tier 3	6222
Tier 4	4531
Tier 5	2754

Data source: Qcc.com, data retrieved as of March 25, 2025

Due to factors such as growing consumption demand, improving consumer awareness, lower cost structures, store density, and infrastructure development, pizza store compound growth rates in Tier 3 and below cities reached 10% from 2016 to 2022, surpassing the 7.6% growth seen in Tier 1 cities. It is projected that between 2025 and 2027, up to 15,000 new pizza stores could open in Tier 3 and below cities.





Consumption Upgrade Demand

Residents in lower-tier cities enjoy relatively strong disposable incomes, and the consumption upgrade trend in lower-tier market is accelerating. Meituan data shows that food delivery offerings in county-level markets have evolved from "Shaxian Stewed Chicken" to "freshly baked pizza + handmade lemon tea", with Meituan Instant Shopping' GMV in township markets growing by 120% year-on-year.

Lower Rent & Labor Costs

Rent and labor costs in lower-tier cities are about 30% - 50% of those in Tier 1 cities.

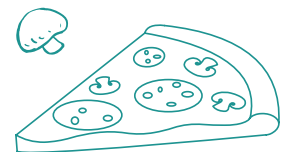


Western Fast Food Awareness Increase

Benefiting from years of market cultivation by brands like McDonald's, Tastien, KFC, Zhengxin Chicken Steak, and Dicos, consumer familiarity with Western fast food items such as hamburgers and fried chicken is already widespread, laying a solid foundation for the pizza category.

Low Pizza Store Density

Pizza stores remain largely concentrated in Tier 2 and above cities. Of Pizza Hut's more than 3,900 outlets, only around 30% are in Tier 3 and lower-tier cities. As the Western fast-food market in Tier 1 and Tier 2 cities approaches saturation and operating costs continue to rise, Tier 3 to Tier 5 cities are emerging as the next key battleground for the pizza industry.



Rising Food Delivery Platform Penetration

Meituan's 2024 data shows that the user growth rate for delivery services in Tier 3 and below cities is 2.3 times that of Tier 1 cities, with increased pizza awareness among younger consumers.

Growth Potential of Minimalist Store Models

Just as Starbucks, which operates under the "third place" concept of cafés, and Luckin Coffee, which focuses solely on coffee products, the pizza industry has evolved from initially targeting high-end consumers with large stores to more accessible, smaller shops that focus on the product itself. Minimalist store models are created to enhance penetration in communities and lower-tier markets, which is expected to be one of the significant growth drivers for the pizza industry.

For example, KFC launched the "KFC Small Town Mini Restaurant" model, reducing opening costs to one-third of that of standard stores. Pizza Hut introduced the "Small Town Plan", launching simplified stores (80-100 m²) by 2025, eliminating complex menu items and focusing on pizza and snacks, with average customer spending dropping to RMB 50-70. It aims to cover 80% of county-level cities. Meanwhile, Pizza Hut launched the "Pizza Hut Wow" concept, with over 200 stores nationwide by December 2024. PizzaMarzano introduced a new franchise model with the MINI store concept, which has already opened in cities such as Shanghai, Zhejiang, and Jinhua.





Brand Name	Small Store Models Exploration
Pizza Hut	<p>In May 2024, Pizza Hut launched the "Pizza Hut Wow" concept in Guangzhou, focusing on a "small yet exquisite" operation model.</p> <p>By December 2024, Pizza Hut had opened over 200 WOW stores nationwide, covering Tier 1 cities like Guangzhou, Shanghai, and Beijing, as well as expanding into Tier 3 and Tier 4 cities and county markets.</p>
Champion Pizza	<p>Champion Pizza plans to open 800 stores in lower-tier markets by 2025, with a focus on community-oriented small shops (15-30 m²), primarily for takeout and food delivery. These stores, located in areas with lower rent, such as communities, street corners, and underground shopping centers, require only 2-3 staff for daily operations. In 2023, 60% of new stores were located in Tier 3 and Tier 4 cities. The "RMB 19.9 solo dining" has led to daily orders of 150 per store, with revenue from lower-tier markets accounting for over 50%. The zero-fee franchise model further accelerates penetration in communities and lower-tier markets.</p>
Domino's Pizza	<p>Domino's Pizza China plans to open 200-300 stores annually, with an expected total of over 1,200 stores by 2025. Domino's Pizza adopts a strategy that balances shopping malls, community, and office locations to serve a food delivery-first, dine-in-secondary model. Most of its stores feature a strong kitchen with limited seating. For example, the Guangzhou Poly Time Store has a kitchen area accounting for about 3/4, with only 1/4 allocated to seating.</p>
PizzaMarzano	<p>In the end of 2023, PizzaMarzano, in partnership with Shanghai CGV Cinemas, opened its first MINI store, covering just over 80 m², with more than 40 seats inside and an additional 10 seats in the outdoor area. Subsequently, PizzaMarzano pushed its small-store franchise model, with the MINI store already operating in Jinhua, Zhejiang.</p>

Domino's Pizza stores are primarily "food delivery hubs" with dine-in as a secondary feature.



SKUs **70+**

In the case of Pizza Hut Wow launched in May 2024, its menu including pizzas, pasta, fried rice, and desserts, with over 70 SKUs, most priced between RMB 10-20, with some items as low as RMB 9, offering an affordable dining experience often compared to Saizeriya restaurant.

Saizeriya, an Italian restaurant from Japan, serves pizza, salad, and pasta with prices around RMB 10, and the average spend per person is only about RMB 40. Despite low pricing strategies, Saizeriya can still achieve a 60% gross profit margin, thanks to its highly standardized, large-scale operations. Saizeriya was one of the first Western restaurant brands to adopt the central kitchen model, where ingredients are processed and standardized in a central facility, then distributed to individual stores for final preparation. At Saizeriya, there are no chefs or knives in the kitchen — most ingredients are semi-finished or ready-to-eat products, and staff only need to heat them before serving. Pizza Hut has indicated that this new store model aims to provide high-quality products with great value-for-money.



Among Pizza Hut Wow menu items, appetizers account for the largest share, with as many as 27 SKUs, including Tuscan-style escargot, cheese tarts, fried squid, salt and pepper chicken, etc. More than ten of these items are priced at RMB 9, while some are priced around RMB 12-15, and a classic three-item snack platter is priced at just RMB 19. The restaurant offers 13 pizza varieties and 5 pasta dishes, with pizza prices starting at RMB 19 and Italian-style meat sauce pasta selling for RMB 17. Rice and pasta dishes are priced between RMB 15-19.





Yum China's CEO, Joey Wat, stated in an investor meeting that this Pizza Hut store model has made significant progress, successfully attracting solo diners, young people, and price-sensitive consumers. Since opening its pilot store in May 2024, Pizza Hut has converted over 100 existing stores into this new model by the end of July. She also mentioned that consumers now demand high value-for-money while ensuring food safety. The solo dining market has emerged as a significant business opportunity, catering to the growing trend of solo dining.



Product & Technology Innovation Potential

Localization Innovation Potential

Just as hamburger and coffee categories have undergone localization innovations in the Chinese market, pizza product innovation must also focus on localization to achieve similar success. In the hamburger category, local brands like Tastien have gained widespread recognition for their "Chinese hamburgers", which fuse Chinese flavors and culture into the products. Since its establishment in 2012, Tastien has expanded to over 9,400 stores by March 2025.

Tastien Stores

9400+



Coffee brands have localized by introducing "milk coffee" to suit Chinese tastes, with Luckin Coffee's store count nearing 23,000.

Luckin Coffee Store

23000





Looking back at the major growth areas in China's F&B industry over the past three years, regional specialty cuisines have shown vibrant momentum, such as Zibo barbecue, spicy hotpot from Tianshui in Gansu, sour soup from Yunnan and Guizhou, Hunan stir-fries, Jiangxi stir-fries, freshly pounded hotpot, and Shunde-style steamed dishes, all of them are vivid examples of the explosive rise of local flavors.

Developing specialty pizzas on the basis of regional food cultures, such as Northeast sauerkraut pizza, Korean kimchi pizza, Yunnan mushroom pizza, Sichuan spicy hotpot pizza, and Cantonese barbecue pizza, aligns with regional tastes and represents a potential growth point for pizza product localization.

Research by Hongcan shows that regional-flavor pizzas saw a 50% increase in sales in 2024, with repurchase rates in lower-tier markets rising by 20%.



Health-oriented Innovation Potential

In 2024, the market size of health-oriented pizza products reached RMB 12.7 billion, accounting for 21.3% of the total industry. In the next three years, driven by demand for healthier options, innovations such as low-calorie crusts, probiotic crusts, high-calcium cheese, reduced-fat cheese, and non-GMO ingredients will bring considerable growth potential to the pizza market.

Health-oriented Pizza
products Market Size

RMB 12.7 billion

Recipe Reform Case Studies

Papa John's Pizza "Low-Calorie" Series

By reducing the amount of cheese and increasing the proportion of vegetables, the calorie content of a 9-inch classic pizza is controlled at 450–500 kcal, representing a 30% reduction compared to the traditional recipe. Whole wheat crust is used to enhance dietary fiber content. A calorie labeling system was introduced alongside, allowing consumers to scan a QR code to access detailed nutritional information such as protein and fat content for each product.





Pizza Hut's Quinoa Crust Technology

With the method of blending quinoa flour and wheat flour in a 1:3 ratio and fermenting the mixture, the protein content of the crust was increased by 25%, and the GI value was reduced to below 45, meeting the needs of fitness enthusiasts. This technology has been applied to the "Light Enjoyment Series", which saw a 42% year-on-year increase in sales in 2024.



Ingredient Substitution Innovation

THE PIZZA SHOW's Healthy Craftsmanship

Uses 24-hour low-temperature fermented dough to reduce yeast usage and boost probiotic activity. This increases crust digestibility by 18%. Stone baking is used in place of traditional iron pans, cutting oil absorption by 50%. A self-developed white sauce (yogurt-based) replaces traditional cream-based sauces.

Master Pizza's Low-fat Cheese

Cooperating with a dairy producer in Yunnan, it developed mozzarella cheese with 50% less fat, using whey separation technology to preserve its stretchiness. This cheese is now used in 80% of the product line. A "zero trans fat" certification label was also introduced, and by Q1 2025, health-oriented products accounted for 37% of orders.



Set Menu Design and Service Upgrades

Pizza Hut's kids' meals include a standard platter of vegetables such as broccoli and carrot sticks, and Tuesdays are designated as "no fried food" days.

Domino's Pizza offers intelligent health recommendations on the basis of users' BMI data and dietary preferences. The APP generates customized pizza options such as "low sodium" or "high protein", and uses biodegradable corn starch boxes for delivery, which help reduce packaging pollution while displaying carbon footprint data.



Regional Health Adaptations

Yunnan-style Herbal Pizza

Master Pizza introduced a "notoginseng powder crust" in the southwestern region, incorporating local medicinal-food traditions and promoting improved blood circulation. A Pu'er tea-flavored sauce was developed simultaneously to replace traditional tomato sauce, addressing its high sugar content.



Scenarios & Marketing Innovation Potential

Cross-industry collaborations create new reasons for in-store visits

Product value = functional value + emotional value + asset value.

With consumers' multi-layered demands for products that are healthy, tasty, and fun, food and beverage brands must deliver on functional value while offering engaging emotional value.

Scene and marketing innovation is also a growth driver that pizza brands cannot ignore. Pizza Hut has long been an industry benchmark in emphasizing experience and fun. Since 2018, Pizza Hut has regularly launched batches of co-branded and themed stores to give customers new reasons to visit.

Pizza Hut's Theme Stores Overview

Launch Time	Theme	Store Description
2018	Pizza Hut · Reading Moments	Promotes nationwide reading and creates a mental retreat
2020	Urban Encounter	An art-inspired store with an upscale ambiance
November 2020	Pizza Hut Dunhuang Art Exhibition Restaurant	A cross-industry collaboration between Pizza Hut and the Dunhuang Museum
December 2020	Pizza Hut · Movie Theme Restaurant	Activates the night economy and caters to young professionals' social needs
Spring Festival 2021	Pizza Hut Intangible Cultural Heritage Theme Restaurant	Pizza Hut is in collaboration with 11 national intangible cultural heritages including Beijing clay figurines, Sichuan opera, Manchu paper-cutting from Xiuyan, and Suzhou Kunqu opera
May 2021	Pizza Hut · A-Sheng's Pet House	A pet-themed store
/	Chef's Rendezvous	A refined social space designed for urban professionals
2021	Floral Escape	A healing garden-like retreat for urban dwellers
August 2022	Genshin Impact Theme Restaurant	Recreates the in-game "Liyue Treasure Hunt" theme and iconic scenes
June 2023	Vacation-style Design Theme Restaurant	Pizza Hut's 3,000th store nationwide, featuring a transparent glass façade, tech vibe, and eco-conscious design
September 2023	Wang Hedi Theme Restaurant	18 newly opened themed restaurants nationwide featuring the celebrity and related merchandise
September 11 to October 1, 2023	League of Legends Theme Store	League of Legends co-branded meal sets and merchandise launched in stores nationwide (excluding those in airports, train stations, etc.)

Data sources: Public information consolidation

Wild Creativity Delivers Emotional Value

For example, on April Fool's Day 2025, Pizza Hut launched a limited-time 2025 "Double Snake Sisters Cultivation Pizza" in select stores, featuring a cheese-filled White Snake Sister Pizza and a pistachio jam-filled Green Snake Sister Pizza, priced at RMB 29 each. It was widely ridiculed online as "so abstract that even the monk Fahai couldn't recognize them".

Despite the mixed reactions, Pizza Hut successfully generated buzz and repeat purchases. As per online data, during the April Fool's event, national daily sales of the Double Snake Pizza exceeded 50,000 units, and some stores even imposed purchase limits due to high demand. Though consumer opinions were divided, the campaign effectively reinforced Pizza Hut's youthful image as a brand that dares to be playful.

Topics about the Double Snake Pizza generated an estimated 300 million views across platforms, making it a landmark marketing event in the food and beverage industry in 2025.



Since 2019, Pizza Hut in Taiwan has been launching creatively bizarre pizza offerings. Viral items like the Halloween Goblin Pizza with deep-fried bullfrogs and plastic eyes on a cilantro bed, the cilantro-century egg-pig's blood pizza, and the durian-stinky tofu pizza all came from the Taiwan creative team.

On April Fool's Day 2023, Pizza Hut Taiwan launched the "Zero-Harm Pizza" - a crust-only creation with no filling in the center. In a subsequent April Fool's campaign, the brand leaned into imperial-themed creativity, introducing quirky items like the Cheese-Filled Twin Glutinous Turtle Pizza and the Cheese-Filled Snake Circle Pizza, said to "tread on a turtle and coil a snake". Amused netizens commented, "It feels like Pizza Hut has given up on making money, they're just indulging in their own artistic fantasies".

In fact, these efforts demonstrate that Pizza Hut is offering emotional value for consumers through creative campaigns and engaging storytelling.



Zero Harm Pizza and Cheese-Filled Twin Glutinous Turtle Pizza



Open Kitchens and Bar Counters Enhance Customer Engagement

PizzaMarzano also emphasizes immersive environments, featuring semi-open kitchens where customers can observe traditional Italian pizza-making techniques such as hand-tossing dough. At its Black Gold location in Guangzhou, a distinctive highlight is the bar counter that opens directly to the outdoors, enabling patrons to enjoy drinks without stepping inside the restaurant.

PizzaMarzano has also launched a "Starlit Party" series of new evening dishes such as grilled beef skewers, sausage platters, and pork ribs, available after 7:30 p.m. It's obvious that PizzaMarzano is actively exploring the late-night dining segment and expanding into snack, barbecue, and beverage categories.



PizzaMarzano China CEO Mr. Wang Dongsheng expressed that these categories hold significant growth potential and help high-frequency items drive sales of lower-frequency products. The challenge now lies in integrating them with Italian pizza and forming a cohesive product line with salad, pasta, and more to meet customer needs.





PizzaMarzano's focus extends beyond pizza - its entire product range, including pizza, pasta, baked rice, salad, steak, beverages, and soup, is built around "core" offerings. For instance, items like grilled chicken wings as a starter or avocado chicken salad are strategically positioned to steer consumer preferences.



Additional efforts are being made to improve the experience: introducing tableside dough-tossing performances for more interaction. Installing heat lamp to keep pizza warm and improve texture. Upgrading food delivery packaging for better insulation, these all strengthen PizzaMarzano's foundation by delivering both functional and emotional value to consumers.





Images from: PizzaMarzano official website



Becoming Trendy Social "Check-in" Spots

Lacesar and Korea's Nine Road Pizzeria adopt a store design strategy aimed at becoming trendy social "check-in" locations.

In 2021, Lacesar began transforming into a "new-generation lifestyle brand" and fully upgraded its store aesthetics. Its Guangzhou Poly Plaza location features a Mediterranean style with sunlight and ocean elements.

The camping-themed store had a pop-up appearance at OCT Creative Park in Shenzhen and was later permanently installed at Shenzhen's COCO Park in Futian. Other store types like kiln-baked pop-ups and "Durian Club" locations sparked a wave of social media check-ins.



Images from: Le Caesar Pizza public account



Nine Road Pizzeria, known as the "cultural mashup packaging master", designs its stores with an American highway theme and mixes nightclub, industrial, and streetwear styles to maximize appeal for in-store diners.





Conclusion

From 2025 to 2027, driven by supply chain infrastructure and AI technology, China's pizza industry will develop along three main tracks: localized innovation, health-focused upgrades, and digital transformation. Health-driven innovation, growth in lower-tier markets, and digitally led omnichannel operations will form the core of future expansion.

It is recommended that pizza brands start by understanding consumer needs, drawing inspiration from the explosion of regional Chinese cuisines, aligning with the growing trend toward healthy eating, optimizing regional ingredient supply chains, leveraging digital and AI technologies, enhancing membership systems and recommendation algorithms, and increasing user retention-seizing the opportunity of a pizza market expanding by more than 15% annually to thrive in this competitive and dynamic category.



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