MARKETSPY AI

INFORMATION ONLY

# Charlotte Pizza Price & Delivery Spy Report

10 high-profile Charlotte pizzerias. What they charge, where they sell, and where the openings are for a competitor willing to move first.

INFORMATION ONLY

| 10 | 3.0x | +20% | 7 of 10 |
|---|---|---|---|
| pizzerias tracked | spread in price per sq. inch | highest app markup seen | run direct online ordering |

INFORMATION ONLY

Prepared for: Demo Client (Charlotte pizzeria owner)

Report date: October 6, 2026 | Report type: Market Landscape + Offer Spy + Executive Brief

Built from publicly visible menus and delivery listings. Not affiliated with any restaurant or delivery platform named.

EXECUTIVE INTELLIGENCE BRIEF

# The one-page version

Charlotte's best-known pizzerias are split into two pricing camps, and most of them are quietly charging delivery-app customers more than walk-in or direct customers. That combination creates two clear openings for any operator in this market: own the value message on size, and own the direct-ordering relationship that competitors are leaving to Uber Eats and DoorDash.

| | |
|---|---|
| **What we found** | Benchmark cheese pies range from $12.00 (King of Fire 10", direct) to $35.10 (Benny Pennello's 28"). Sticker price misleads, though. Measured per square inch, the big-pie shops (Benny Pennello's, Hawthorne's, Pure) deliver pizza at 5.7 to 9.4 cents, while the 10 to 11 inch artisan shops (Brixx, King of Fire, Omaggio) sit at 14.7 to 17.0 cents. |
| **What matters** | Delivery-app pricing is inconsistent. Pure Pizza charges 20% more on DoorDash and 13.7% more on Uber Eats than on its own Toast ordering. King of Fire shows a uniform 19.5% Uber Eats uplift. Brixx, Emmy Squared and Hawthorne's hold the same price everywhere we checked. |
| **Biggest threat** | Hawthorne's owns the value anchor: an 18-inch pie for $18.99, the same price on direct ordering and catering, across multiple locations, backed by an 'award-winning since 2004' story. Any NY-style shop pricing a 16-inch above $19 is competing against that number in the customer's head. |
| **Biggest opportunity** | Seven of ten run direct online ordering, yet none of the app listings we reviewed tell customers the direct price is lower. A shop that prices apps up and tells customers the direct price is lower converts the markup into a reason to switch. |
| **Recommended next move** | Run the three tests on page 6: a published per-inch value claim, a direct-order savings message, and an Uptown lunch/catering bundle where only two of ten competitors are visibly selling catering online. |

**How to read this report**

Every finding is labeled by type. **Observed** means a price or listing we saw directly on a menu or ordering page on October 6, 2026. **Inferred** means our interpretation of what those observations suggest. Treat inferences as hypotheses to test, not facts.

MARKET LANDSCAPE | OBSERVED

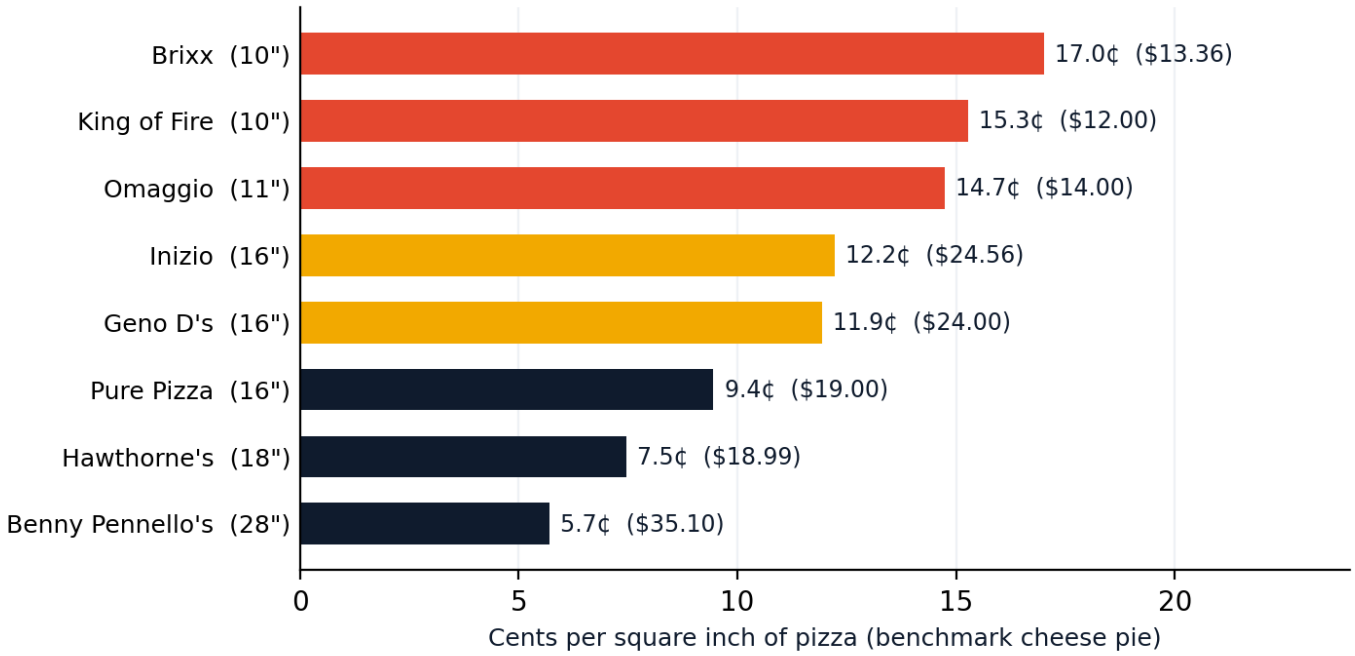
# Price snapshot: 10 pizzerias

Each restaurant's cheapest plain or base pie, at the lowest price we could verify, with the channel it came from. Selection was based on repeat appearances in 2026 Charlotte 'best pizza' guides plus high review counts on delivery apps. This reflects visibility and reputation, not sales volume.

| Restaurant | Style | Benchmark pie | Price | ¢ / sq in | Price source |
|---|---|---|---|---|---|
| **King of Fire Pizza** Uptown (S. Tryon) + food trucks | Competition-style, 10-inch | 10" build-your-own base | **$12.00** | 15.3 | Toast direct ordering |
| **Fuel Pizza** Central Ave (Plaza Midwood) + locations | NY slice shop | Cheese pie, 4 sizes | **$12.99** | n/a | Official menu PDF (Mar 2025) |
| **Brixx Wood Fired Pizza** Dilworth, Foxcroft, Blakeney, more | Wood-fired, 10-inch | 10" Classic Cheese | **$13.36** | 17.0 | Uber Eats = DoorDash = Storefront |
| **Pizzeria Omaggio** Midtown (Metropolitan) | Roman/Italian, personal pies | Classico cheese (personal) | **$14.00** | 14.7 | DoorDash |
| **Emmy Squared Pizza** South End + Plaza Midwood | Detroit-style (square) | Classic "Sixer" (6 slices) | **$18.48** | n/a | Toast direct ordering |
| **Hawthorne's NY Pizza & Bar** South End, E. 7th St, Rea Rd, more | New York | 18" New Yorker (cheese) | **$18.99** | 7.5 | DoorDash Storefront (direct) |
| **Pure Pizza** Plaza Midwood (The Plaza) | Neapolitan-leaning craft | Large (16") cheese | **$19.00** | 9.4 | Toast direct ordering |
| **Geno D's Pizza** Uptown (E. 7th St) | Jersey Shore / Grandma | 16" cheese | **$24.00** | 11.9 | DoorDash |
| **Inizio Pizza Napoletana** Providence Commons, Dilworth, Huntersville | Neapolitan, wood-fired | Large cheese (approx. 16") | **$24.56** | 12.2 | Uber Eats |
| **Benny Pennello's** NoDa | NY, 28-inch giant | 28" whole cheese | **$35.10** | 5.7 | Brand menu / Uber Eats & Postmates |

Fuel's $12.99 is its smallest of four sizes on the March 2025 official menu (largest: $23.99). Emmy Squared is a rectangular Detroit pie, so per-inch math does not apply; its 6-slice Sixer works out to $3.08 per slice. Inizio's 16-inch size comes from a customer review, and Omaggio's 11-inch size from its launch coverage. King of Fire's $12 is the build-your-own base.

## What you actually get for the money




**Inferred:** customers comparing on menu price alone will see Brixx and King of Fire as the 'cheap' options. In reality they cost roughly 2 to 3 times more per bite than the big NY pies. A competitor with a large pie can win that argument simply by doing the math out loud.

OFFER SPY | OBSERVED

# Who sells where

Ordering channels we found for each restaurant. 'Not verified' means we did not confirm a listing in this pass; it does not mean the listing is absent. Postmates listings mirror Uber Eats (same company) and are folded into that column.

| Restaurant | Direct online ordering | Uber Eats | DoorDash | Catering / other |
|---|---|---|---|---|
| **Hawthorne's** | DoorDash Storefront | Yes | Not verified (Storefront only) | ezCater |
| **Benny Pennello's** | SpotOn | Yes | Not found | None seen |
| **Pure Pizza** | Toast | Yes | Yes | In-house 'Catering by Pure' |
| **Fuel Pizza** | DoorDash Storefront | Yes | Yes | ezCater ($15 delivery fee) |
| **Inizio** | Not verified | Yes | Not verified | Mobile catering unit |
| **Geno D's** | Not verified | Yes | Yes | None seen |
| **Emmy Squared** | Toast | Yes | Not verified | Private events / buyouts |
| **Omaggio** | Not verified | Not found | Yes | None seen |
| **King of Fire** | Toast | Yes | Yes | Food trucks / family pack |
| **Brixx** | DoorDash Storefront | Yes | Yes | None seen |

## Patterns worth noticing

**Observed:** all ten sell through at least one third-party app. Direct online ordering runs on three platforms: Toast (Emmy Squared, Pure, King of Fire), DoorDash Storefront (Hawthorne's, Fuel, Brixx) and SpotOn (Benny Pennello's). Only Hawthorne's and Fuel have catering menus on ezCater. Pizzeria Omaggio appears to rely on DoorDash and its sister app Caviar, with no Uber Eats listing found.

**Inferred:** DoorDash Storefront gives a restaurant a branded 'direct' page while still routing delivery through DoorDash drivers. That lowers commission compared with the marketplace, but the customer relationship is less fully owned than with a POS-native system like Toast. For a client, the choice between these is a real margin and data decision, and worth a line in any sales conversation.

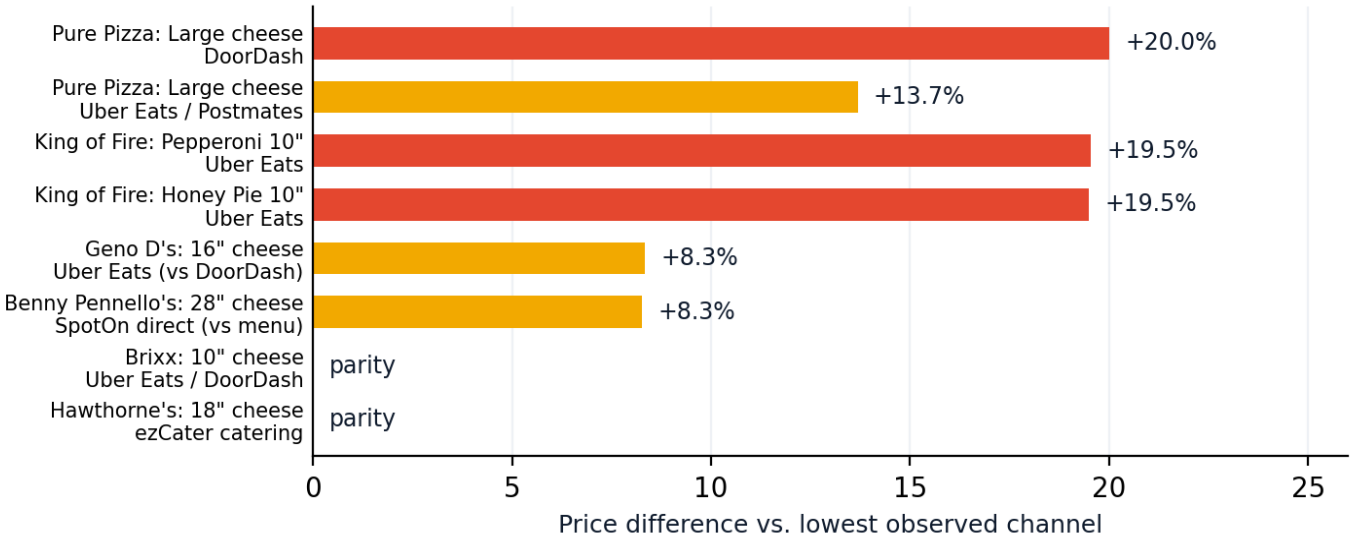
### Promotions visible on the apps today

Geno D's: buy-one-get-one on 10" pies (Uber Eats). Hawthorne's: buy-one-get-one on side salads (Uber Eats, South End). Pure Pizza: large pizza + large salad earns a free kids item (direct). King of Fire: $78 family pack on its food-truck listings. Every listing we checked also displayed Uber Eats' own $0-delivery-fee offer for new users, which is platform money rather than restaurant money.

PRICING INTELLIGENCE | OBSERVED + INFERRED

# The delivery-app markup gap

Same item, same restaurant, different channel. Percentages compare each app price with the lowest price we found for that item. Delivery and service fees are excluded, so the real gap a customer pays is larger.




| Restaurant | Policy we observed | Evidence |
|---|---|---|
| **Pure Pizza** | Tiered markup by app | Large cheese $19 direct, $21.60 Uber Eats/Postmates, $22.80 DoorDash. Small cheese $13 direct, $14.40 Postmates, $15.60 DoorDash. |
| **King of Fire** | Flat ~19.5% on Uber Eats | Every Uptown item checked is 1.195x the Toast price. DoorDash pepperoni is $16.90 vs $13 direct, but at a different S. Tryon address, so treat that +30% with caution. |
| **Geno D's** | Uber Eats priced above DoorDash | 16" cheese $24 vs $26; Grandma $20.40 vs $22.10. No direct price found to compare. |
| **Benny Pennello's** | Direct ordering priced above menu | SpotOn lists the 28" cheese at $38.00 vs $35.10 on the brand menu and Postmates. This is unusual and may be a stale listing; worth a phone check. |
| **Brixx, Emmy Squared, Hawthorne's** | Price parity | Identical prices across every channel we compared. |

**Inferred:** the parity shops are absorbing app commissions on delivery orders, which is a margin choice the markup shops have refused to make. Neither approach is wrong, but a markup only pays off twice if the restaurant also tells customers that ordering direct is cheaper. Otherwise the customer simply pays more on the app and never learns there is a better option.

COMPETITOR X-RAY | OBSERVED

# Restaurant profiles

**Hawthorne's NY Pizza & Bar** New York | South End, E. 7th St, Rea Rd, more — **$18.99** 18" New Yorker (cheese)

Same $18.99 on its DoorDash-powered direct ordering and its ezCater catering menu (serves 4). Uber Eats listing (South End) runs a buy-one-get-one on side salads. Markets itself as six-time 'Best of the Best Pizza' winner, open since 2004. Uber Eats rating 4.7 from 480+.

**Benny Pennello's** NY, 28-inch giant | NoDa — **$35.10** 28" whole cheese

Whole 28" cheese is $35.10 on the brand menu and Postmates; its SpotOn direct ordering lists $38.00. Slices: $5.31 on menu, $5.75 on SpotOn. Late-night slice culture is the hook.

**Pure Pizza** Neapolitan-leaning craft | Plaza Midwood (The Plaza) — **$19.00** Large (16") cheese

Large cheese is $19 direct, $21.60 on Uber Eats/Postmates and $22.80 on DoorDash. Runs the only visible combo deal in this set: large pizza + large salad earns a free kids item ($34 bundles).

**Fuel Pizza** NY slice shop | Central Ave (Plaza Midwood) + locations — **$12.99** Cheese pie, 4 sizes

Official menu lists cheese pies at $12.99 / $14.99 / $20.99 / $23.99 across four sizes. Direct online ordering runs until 1:10 AM, the latest window in this set. Local since 1998.

**Inizio Pizza Napoletana** Neapolitan, wood-fired | Providence Commons, Dilworth, Huntersville — **$24.56** Large cheese (approx. 16")

Uber Eats: large cheese $24.56, large Margherita $25.73, small cheese $15.20; specialty larges $28.88 to $32.75. 4.7 rating from 1,500+ on Uber Eats. Customer reviews repeatedly call it pricey but worth it. Size taken from a customer review mentioning a 16-inch pie.

**Geno D's Pizza** Jersey Shore / Grandma | Uptown (E. 7th St) — **$24.00** 16" cheese

16" cheese: $24.00 DoorDash vs $26.00 Uber Eats. Grandma pie: $20.40 DoorDash, $21.49 Postmates, $22.10 Uber Eats. Uber Eats runs buy-one-get-one on 10" pies. 4.7 from 1,000+ on Uber Eats. Closed Mondays.

**Emmy Squared Pizza** Detroit-style (square) | South End + Plaza Midwood — **$18.48** Classic "Sixer" (6 slices)

Classic pizza: Skinny Square $16.28, Sixer $18.48, Tenner $25.85 direct. Spot checks show matching prices on Uber Eats (boneless wings $13.09 on both). Multi-state chain; 2,000+ ratings on Postmates for South End.

**Pizzeria Omaggio** Roman/Italian, personal pies | Midtown (Metropolitan) — **$14.00** Classico cheese (personal)

DoorDash: Classico cheese $14.00, Diavola $15.50, Regina Margherita $17.00, Trio $20.00. Also on Caviar (DoorDash-owned). No Uber Eats listing found. Pies have historically been a personal 11-inch size.

**King of Fire Pizza** Competition-style, 10-inch | Uptown (S. Tryon) + food trucks — **$12.00** 10" build-your-own base

Direct: BYO $12, Pepperoni $13, Honey Pie $14. Uber Eats (Uptown): $14.34 / $15.54 / $16.73, a consistent 19.5% uplift. DoorDash (separate S. Tryon address): cheese $15.60, pepperoni $16.90. Founder is a multi-time world pizza champion.

**Brixx Wood Fired Pizza** Wood-fired, 10-inch | Dilworth, Foxcroft, Blakeney, more — **$13.36** 10" Classic Cheese

Identical prices everywhere checked: cheese $13.36, pepperoni and Margherita $15.80, 1/2+1/2 $18.24. Single 10-inch size. Charlotte-founded in 1998; 4.6 from 1,500+ on Uber Eats (Dilworth).

GROWTH PLAYBOOK | INFERRED

# Three tests a Charlotte pizzeria could run next month

These are written for a hypothetical client competing in this set. Each one is cheap to test and has a clear success measure. None of them is guaranteed; the point is to find out fast.

### Test 1: Sell the inch, not the pie

If you sell a 16 to 18 inch pie, publish the per-inch comparison on your menu board and online ordering page: what a customer gets versus a 10-inch artisan pie at a similar price. The data above shows the 10-inch shops charging 2 to 3 times more per square inch. Measure: average ticket and large-pie mix over four weeks versus the prior four.

### Test 2: Put a number on 'order direct'

If your app prices are higher, say so on the app listing description, your Google Business profile and the pizza box: 'Order at [site] and save about 15%.' Pure and King of Fire carry 13.7 to 20% app uplifts and the listing pages we reviewed carried no such savings message. Measure: share of orders through direct ordering, tracked weekly.

### Test 3: Uptown lunch and office catering bundle

Only Hawthorne's and Fuel show catering menus on ezCater, and Uptown has a dense office lunch market around King of Fire and Geno D's. A fixed-price 'feeds 10' bundle (pies, salad, knots, drinks) listed on ezCater and pitched to nearby office managers tests demand cheaply. Measure: catering inquiries and repeat orders within 30 days.

## What to watch weekly

Re-run this scan every week and flag three things: any price change at Hawthorne's (the market's value anchor), new buy-one-get-one or bundle promotions on Uber Eats and DoorDash, and any competitor adding Toast or Storefront direct ordering. Those are the moves most likely to shift local price expectations.

METHODOLOGY & SOURCES

# How this report was built

Prices were captured on October 6, 2026 from public restaurant ordering pages (Toast, DoorDash Storefront, SpotOn), delivery marketplaces (Uber Eats, Postmates, DoorDash), ezCater catering menus and official menu files. Marketplace prices can differ by delivery address, time of day and location, and never include delivery, service or small-order fees. Where a restaurant has several locations, the location used is named in its profile.

**Excluded from the top 10:** Pizza Baby (Wesley Heights and Elizabeth) appears on several 2026 best-of lists and holds 50 Top Pizza recognition, but we could not find a current published pie price. Due Amici Pizza was also excluded because the only prices available were on third-party menu aggregators with no clear date. Both are worth a phone or in-person price check before a client presentation.

- Uber Eats store pages: Inizio (Providence Commons), Hawthorne's (South End), Geno D's, King of Fire (Uptown, Food Trucks 1 and 5), Brixx (Dilworth, Foxcroft, Blakeney), Emmy Squared (South End, Plaza Midwood), Fuel (The Green)
- Postmates store pages: Benny Pennello's, Geno D's, Pure Pizza, Emmy Squared South End, King of Fire Uptown
- DoorDash store pages: Geno D's, Pizzeria Omaggio (and Caviar), Pure Pizza, Fuel, King of Fire, Brixx (Fairview Rd)
- Direct ordering: order.emmysquaredpizza.com (Toast); order.toasttab.com for Pure Pizza and King of Fire Uptown; order.online (DoorDash Storefront) for Hawthorne's, Fuel and Brixx; order.spoton.com for Benny's
- Brand sites and menus: bennysva.com (Benny Pennello's), fuelpizza.com menu PDF (March 2025), emmysquaredpizza.com
- Catering: ezcater.com listings for Hawthorne's NY Pizza Bar and Fuel Pizza
- Popularity screen: Top of Charlotte '10 Best Pizza Spots' (2026), Charlotte Magazine best pizza guide, CharlotteFive / Charlotte Observer 2026 top 20, Pizza Today, OpenTable listings

### Limits of a quick-pass scan

This is a pricing and channel snapshot. It does not cover review sentiment in depth, local search rankings, social media activity, or website conversion, all of which a full MarketSpy engagement would add. Restaurant sizes for Inizio and Omaggio come from secondary sources and should be confirmed.