

The Breakfast Club

Introduction

The breakfast segment has shown impressive gains within the restaurant industry over the past few years, with key breakfast trends continuing to move into new and exciting territories. Lately, operators are offering everything from creative egg dishes and sandwiches to Mexican flavor fusions, all while keeping popular attributes like health and portability front and center.



Tracking the Top Growing Breakfast Items

Since 2008, the top five fastest-growing breakfast items are yogurt, frittatas, oatmeal, burritos, and huevos rancheros. Paying particular attention to menu items showing the most growth, it's evident that each one represents a sub-trend in the industry—frittatas representing an overall push toward creative egg dishes; yogurt and oatmeal representing consumers' desire for healthful ingredients; huevos rancheros and burritos representing an embrace of Mexican flavors. As more and more consumers look for culinary innovation, more and more operators are introducing these popular items at their restaurants.

Menu Item	Growth ('12 vs. '08)
Yogurt	36%
Frittata	31%
Oatmeal	15%
Huevos Rancheros	11%
Burrito	11%
Sandwich	7%
Corned Beef Hash	6%
Benedict	5%
Pancakes	4%
Ham & Eggs	3%
French Toast	2%
Steak & Eggs	1%

Egg Ingenuities on the Menu

With items like frittatas, skilletts, and benedicts showing significant menu growth since 2008, it's no surprise that operators are scrambling (pun intended) to come up with one-of-a-kind egg dishes. In fact, as the table above shows, egg variations beyond the usual omelet account for six of the top twelve menu items showing the most growth. Many family and fast-casual dining establishments rolled out unique egg dishes in the past year. For example, Panera added a Sausage and Gouda Baked Egg Souffle to its "Fall Flavors" menu in September, and over the summer, Mimi's Cafe served its patrons a Smoked Ham and Vegetable Egg Frittata with feta cheese.

Restaurant Examples:

- **Steak 'n Shake California Skillet Chicken:** "A fresh combination of eggs, scrambled with your choice of savory sausage or grilled chicken, cheddar cheese and pico de gallo on a bed of crispy hash browns. It's topped with fresh avocado slices and served with our fresh homemade salsa."
- **First Watch Casa Frittata:** "An open-faced frittata with roasted tomatoes, spinach, herbed goat cheese and sliced breakfast sausage."

Artisan To-Go: Redefining the Breakfast Sandwich

Clearly, operators are progressing past standard scrambles and omelets and creating some really interesting flavor combinations. But it's when operators combine eggs with portability that creativity really seems to shine. That wasn't always the case; portable breakfasts from restaurants used to mean a very basic egg-and-cheese sandwich. But lately, operators offer customers the best of both worlds: convenient, on-the-go options made with premium ingredients.

Sandwiches lead the portability category in terms of popularity. Now over half of restaurants serving breakfast have them on the menu, and at the QSR level, they've shown a 9 percent growth since 2008.



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The following are some of the more inventive egg sandwiches on menus in the past year.

Restaurant Examples:

- **Paradise Bakery & Cafe's Breakfast Power Sandwich:** "Made with all-natural egg, Vermont white cheddar, and smoked lean ham all grilled on freshly baked whole grain bread."
- **Au Bon Pain's Southwest Egg Sandwich:** "Two fresh eggs, applewood smoked bacon, sliced tomatoes and cheddar cheese served with a chipotle spread on a skinny wheat bagel."
- **Panera's Mediterranean Egg White on Ciabatta:** "Egg whites, a thick slice of Vermont white cheddar, roasted tomatoes, fresh spinach, & basil pesto on freshly baked ciabatta."

Portable breakfasts may not be new, but portable breakfasts with premium ingredients are (see table to the right), and they're redefining the morning-meal landscape. These ingredients are the top five in each category when it comes to breakfast sandwich menu penetration between 2011 and 2012.

Why have a basic, nondescript "egg and cheese sandwich" when you can have "all-natural egg and white cheddar on fresh-baked bread"? Add a little crispy bacon and basil pesto and you have all the makings of a gourmet meal.

Busy consumers looking for something quick and hand-held no longer have to settle for basic and ho-hum thanks to the introduction of these new carriers, cheeses, proteins, sauces, veggies, and descriptors.

Fastest Growing Breakfast Sandwich Ingredients and Descriptors					
Carriers	Cheeses	Proteins	Sauces/Flavors	Veggies	Descriptors
Cuban	Asiago	Fried Chicken	Balsamic	Zucchini	Braised
Grain Bread	Fresh Mozzarella	Roast Beef	Dijon	Arugula	Baby
Rye	Fontina	Battered Chicken	Horseradish	Sauerkraut	Organic
Texas Toast	White Cheddar	Pork Tenderloin	Chutney	Portobello	Garden
Multi-Grain	Gouda	Breakfast Sausage	Hollandaise	Roasted Red Pepper	Cured

Chefs Draw Inspiration from Mexican Cuisine

Another way restaurant chefs are catering to their patrons' desires is by experimenting with new, bold flavors in the kitchen. For example, Mexican menu items are quickly becoming staples for breakfast. Enchiladas, huevos rancheros, burritos, and tacos have had significant penetration on non-Mexican breakfast menus over the past year, with enchiladas topping the list at a 32 percent gain. Because both corn and flour tortillas work well with classic breakfast ingredients like scrambled eggs and sausage, it's easy for operators to incorporate these carriers into their menus without deviating too far from their customers' culinary comfort zones. And since Mexican flavors are so distinctive, a little can go a long way. Adding just one or two of those flavors can really showcase a dish's Mexican influence. Chipotle, pico de gallo, and guacamole are flavoring a growing number of breakfast dishes, with chipotle leading the pack at a 12 percent gain at non-Mexican restaurants over the past year. Below is a sample of dining establishments working popular Mexican flavors into non-Mexican breakfast dishes.

Restaurant Examples:

- **Coco's Restaurant & Bakery's El Paso Benedict:** "Crisp applewood smoked bacon, fresh tomatoes, two poached eggs, spicy chipotle hollandaise sauce and fresh avocado atop a toasted English muffin."
- **Village Inn's Santa Fe Style French Toast:** "Savory battered French bread topped with tender carnitas, pepper jack cheese, red peppers, onions, and two eggs any style, all smothered with green chili and fresh jalapeno slices."

The adoption of Mexican flavors and menu items sometimes goes hand-in-hand with the adoption of other breakfast trends as well. For example, whole wheat tortillas can be used as a carrier instead of buttered toast, and fresh salsa and cilantro can add flavor to omelets without adding any fat. And for a quick, on-the-go breakfast, it's hard to beat a taco or burrito.

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