



Running for A.M. Gold



Everyone is aware of Taco Bell's recent entrance into the breakfast market. News outlets of every stripe have covered the national advent of the A.M. Crunchwrap™ & Waffle Taco's scrambled eggs, meat & cheese. Support came from the amazing

first volley of promotional media with a throng of men named Ronald McDonald proclaiming their love for Taco Bell's new breakfast.

Within 36 hours of the morning launch, McDonald's rapid-fire responses included a Facebook entry of Ronald McDonald patting a Chihuahua and the words, "Imitation is the sincerest form of flattery." Then came the tweets: "Breaking! Mayor McCheese confirms: Ronald, in fact, still prefers McDonald's," and "Nothing beats the original #FirstMeal." The finale for the day came with the announcement of free McCafé coffee

American Egg Board

during regular breakfast hours from March 31 through April 13.

What does this mean? Three things:

- Taco Bell recognizes McDonald's as the A.M. big dog.
- McDonald's recognizes Taco Bell as real competition.
- The daypart will receive increased attention as everyone works harder to differentiate themselves.

Taco Bell's entry may bring an entirely new demographic to the morning daypart. Fasten your seatbelts – it's going to be an interesting ride.

Protein Shake-Up

The undisputed king of foodservice breakfast proteins is the egg with a 92% penetration, followed by bacon, sausage and ham. Leaner poultry-based bacon and sausage are growing fastest, with menu penetration of turkey bacon increasing 53% and turkey sausage rising 39% since 2009.¹

But there are other changes as well. In 2013, 24% of consumers were eating turkey at breakfast more often, while 11% had been eating more chicken. Other proteins to watch include pork belly and pulled pork, up 159% and 76% respectively since 2012.²

Examples include:

- **Einstein Bros.' Santa Fe Egg Wrap** with eggs, turkey sausage, ancho lime salsa, jalapeño schmear and pepper jack cheese.
- **Qdoba's Breakfast Burrito**, a tortilla filled with grilled chicken, eggs, potatoes, choice of sauces and salsas, and optional cheese or sour cream.
- **2 Sparrows' (Chicago) Belly Sandwich** made of crispy pork belly, bacon jam, fennel & tomato relish, and sunny-side egg on a biscuit.

The American breakfast plate is changing but eggs remain the delicious constant.



Getting Your Veggies



American consumers are rediscovering the importance of protein for improving energy and well-being, with a full 57% of Americans actively trying to consume more.³ One group that often gets shortchanged on variety when getting enough protein are vegetarians.

For people getting much of their protein from eggs, creativity in combining them with veggies, grains and cheeses is vital. But more often than not, they stare at menus with no viable choices beyond steamed veggies or salad.

There is one bright spot: the breakfast menu. Operators have discovered new uses for spinach, mushrooms, zucchini, kale and avocado, and are using multiple veggies and cheeses in omelets, frittatas and Benedicts. Plantain, sweet potato and poblano have all at least doubled their number of menu mentions since 2009.¹

Some delectable examples:

- **Vegetable & Fontiago Breakfast Sandwich (Starbucks):** fried egg, spinach, sundried tomatoes, caramelized onions & aged Fontiago cheese on multigrain ciabatta.
- **John's Breakfast (Tasty n Sons):** house-made kimchi, sautéed vegetables, brown rice & sunny-side up egg.
- **Asparagus, Mushroom & Swiss (Einstein Bros.):** egg whites, asparagus, mushrooms, Swiss & roasted tomato spread on whole wheat honey bagel. Meatless food even a carnivore would love!

Millennial Dining



Nearly 80 million U.S. Millennials are exerting an increasing impact on restaurant menus. Defined as roughly 20-35 years old, Millennials currently account for 22-24% of restaurant spending, a figure that will jump to 40% by 2020.⁴ A successful operator will understand that this group:

- Eats out frequently, using restaurants to socialize.
- Likes to customize dining occasions & foods.
- Tends to eat frequently throughout day & night.
- Is adventurous with ethnic flavors.

Millennials' hunger is not tied to traditional mealtimes or foods, their preference being to eat whatever, whenever. While midscale operations have served this impulse for decades by offering entire menus 24/7, a growing number of QSR chains are joining in by adding late-night dining offering a

blended menu of breakfast and dinner items. Daypart-bending programs like these appeal to this crowd:

- **McDonald's After Midnight**, making breakfast items available for 10+ hours each day.
- **Jack-in-the-Box's Late Night** shareable egg-topped Brunch Burger Munchie Meal™.
- **Steak 'n Shake's Late Night Menu** including the Steakburger™ Slinger Skillet topped with two fried eggs.

Understanding this demographic will be a key to success in the not too distant future.

Chain News

McDonald's

- Began regional marketing for breakfast in February, partnering with Good Morning Boston and Good Morning Providence.
- Initiated testing of Petite Pastries in San Diego, including cinnamon cream cheese and raspberry varieties.
- Offered free small coffees during breakfast hours from March 31-April 13.



White Castle announced two new breakfast sandwiches with bacon, egg and cheese, or sausage, egg and cheese between authentic Belgian waffles.

Dunkin' Donuts reintroduced Baskin Robbins-inspired coffees for spring, including Cookie Dough, Jamoca Almond Fudge and Butter Pecan, available hot or iced.

Whataburger announced Jalapeño Cheddar Biscuits (LTO) which can be ordered in place of any regular biscuit.

Bruegger's Bagels

ran a spring LTO called The Big Easy made with eggs, andouille sausage, Sriracha mustard and green peppers.



Friendly's launched the Philly Steak & Cheese Bagel

with shaved grilled rib eye steak, melted American cheese and 2 large fried eggs on a grilled bagel.

Incredible Breakfast Trends

Breakfast trends change rapidly as market influencers help define new forms and flavors. Current trends information helps you create breakfast dishes fresh and

sometimes edgy, yet always appealing. The American Egg Board tracks and analyzes the data to tell you what's hot and what's next for breakfast creations with quarterly

"Incredible Breakfast Trends." Find out more at www.AEB.org/BreakfastTrends

Data Digest

- Breakfast items have grown 19% in menu penetration in the past 8 years.¹
- More of us are eating more breakfasts – 336 annually/person in 2013 vs. 316 in 1999.⁵
- 52% of breakfasts being eaten on-premise are eaten at QSR – in 2002 QSR was only 36.2% of on-site.⁶
- Since 2009, 32% more restaurants offer egg whites on their breakfast menus, which includes 5% growth over the past year.¹
- In the past 4 years breakfast menu penetration of chorizo has risen 19%.¹
- More than 30% of Millennials want to see more vegetarian protein on breakfast menus.²



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SOURCES

1. Datassential MenuTrends
2. Technomic, The Breakfast Consumer Trend Report
3. International Food Information Council Foundation
4. National Restaurant Association
5. The NPD Group's National Eating Trends® and CREST®
6. The NPD Group's CREST®