Breakfast handhelds are essential at both restaurants and retailers. As today’s consumers increasingly request convenient foods to eat during the morning rush, operators need to fulfill morning cravings with satisfying on-the-go options. The good news is that many of these items already heavily populate menus. Sandwiches, for example, are the third-most popular breakfast entrée on menus, behind egg dishes and breakfast starches. But because menus are already inundated with breakfast handhelds, the challenge for operators is finding ways to differentiate their offerings to attract customers.

### Breakfast Handheld Purchasing Behavior

Consumers were asked to indicate the importance of specific elements when creating a good breakfast handheld item. The most prevalent responses were associated with the quality of ingredients used in the preparation, the packaging, the general quantity of ingredients, the ability to customize and its price.
Looking at the data from among consumers who buy handhelds from specific locations once a month or more often, 58% of consumers said they opt for drive-thrus. Although consumers have plenty of choices in terms of where to source breakfast handhelds, the convenience of drive-thrus is ranked higher than all other occasions. Convenience also influences 57% of patrons to purchase their breakfast handheld as a takeaway item from a limited-service restaurant. Slightly fewer consumers overall (56%) purchase breakfast handhelds from limited-service restaurants, and opt to dine in for the occasion during the week and the weekend.

More than seven out of 10 consumers cited customization as an important attribute. Condiments are an easy way for operators to allow their patrons the chance to add a personal touch to breakfast handhelds.

How often do you purchase breakfast handhelds (e.g., breakfast sandwich/wrap/taco/burrito, etc.) in the following settings? (Once a month+)

- In a drive-thru: 58%
- As a takeaway item from a limited-service restaurant: 57%
- As a dine-in meal at a limited-service restaurant during the week: 56%
- As a dine-in meal at a limited-service restaurant during the weekend: 56%
- At a full-service, sit-down restaurant during the week: 49%
- At a full-service, sit-down restaurant during the weekend: 45%
- At a retail prepared-foods area during the week: 39%
- At a retail prepared-foods area during the weekend: 38%
- At a business or industry office or building: 22%
- At a school/college/university setting: 18%

Base: 1,000 consumers aged 18+ who eat breakfast away from home on weekdays or weekends

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Full-service restaurants are less likely to be destinations for breakfast handhelds, both during the week (45%) and during the weekend (49%).
Base/Bread

Despite a broad range of carrier choices for handhelds, consumers still largely gravitate toward the most familiar breakfast handheld options. Croissant (37%), biscuit (37%) and English muffin (33%) sandwiches were the top three varieties according to consumers overall. Rounding out the top five choices were bagel sandwiches (28%) and breakfast tacos or burritos (26%).

Regional preferences played a role in these responses. For example, bagel preferences skewed strongly toward Northeastern consumers (48%), while the preference for biscuit sandwiches showed a clear skew toward consumers in the South (47%).

Beyond the traditional breakfast handheld bases, a number of more nontraditional options have been popping up at restaurants as of late in order to create a specialty positioning. Let’s take a look at some trends that umbrella these innovative bread/base options on menus:

- **Premium**—High-quality specialty breads like ciabatta and brioche are trending in breakfast handhelds. The added value of using these European breads is quality perception.

- **Mash-up**—Breakfast handhelds are now featuring other popular breakfast dishes as a base, such as favorites like doughnuts, pancakes, waffles and French toast. These bases provide sweeter counterparts to more savory breakfast handheld fillings.

- **Indulgent**—Operators are increasingly featuring hearty, decadent breads like challah and biscuits on breakfast handhelds. While many chefs are pairing these breads with lighter toppings, some chefs are opting for super-indulgent combinations like chipped beef-topped challah or a fried chicken biscuit sandwich.
Protein
In addition to or in place of eggs, other proteins often star on breakfast handhelds, particularly pork products. Bacon, ham and sausage are the top three breakfast handheld proteins, respectively, while chorizo, pork and Canadian bacon round out the top 10.

Better-for-you proteins like turkey, chicken and lox are also carving out a niche in breakfast handhelds as diners seek more healthy yet filling options in the morning. Turkey, in particular, has been surging on breakfast menus in the noncommercial arena as of late. In the summer, Polk County Public Schools in Bartow, FL, added a handheld turkey sausage stick wrapped in a pancake.

Some trends among the fastest-growing proteins on breakfast handhelds are:

- **Sausages Galore**—In addition to standard sausage, salami, chorizo and pepperoni are all growing on breakfast handheld menus. Salami and pepperoni are typically piled atop traditional breakfast sandwiches with eggs, while chorizo often stuffs breakfast burritos and tacos.

- **Better-for-You**—Turkey and fish (like salmon and whitefish) are topping handheld bagels, sometimes in an open-faced format, with cream cheese, cucumber and other traditional offerings.

- **Beef Bifurcation**—Beef is proliferating on breakfast handhelds, though options are entirely contrasting. Sirloin is one of the more recognized beef cuts, though inexpensive and considered more common compared to other cuts, while Angus is a more expensive and premium type of meat.

On the menu

Turkey Sausage, Egg White and Cheddar Smart Bagel Breakfast Sandwich at QuickChek

Top Proteins on Breakfast Handhelds
(menu incidence)

1. Bacon (1,290)
2. Ham (1,030)
3. Sausage (984)
4. Turkey (244)
5. Chicken (184)
6. Lox (176)
7. Chorizo (155)
8. Pork (99)
9. Beef (92)
10. Canadian Bacon (45)

Source: Q2 2015 MenuMonitor, Technomic

Fastest-Growing Proteins on Breakfast Handhelds
(YOY incidence growth)

1. Pepper Bacon (25.0%)
2. Salami (23.1%)
3. Angus (22.2%)
4. Salmon (16.1%)
5. Chorizo (12.6%)
6. Sirloin (12.5%)
7. Whitefish (9.1%)
8. Pepperoni (7.7%)
9. Turkey (3.5%)
10. Sausage (1.9%)

Source: Q2 2014–Q2 2015 MenuMonitor, Technomic
Because of its gooey, sticky texture when melted, cheese is often considered the glue of the breakfast handheld, the ingredient that holds everything together. A plethora of cheese types means the ingredient can add anything from a delectably mild, creamy and soft mouthfeel to a pungent, hard and crumbly bite to a breakfast handheld. Further, cheese can have an entirely different character when young than it does when aged.

### Top Cheeses on Breakfast Handhelds (menu incidence)

<table>
<thead>
<tr>
<th>Cheese Type</th>
<th>Incidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheddar</td>
<td>593</td>
</tr>
<tr>
<td>Cream Cheese</td>
<td>267</td>
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<tr>
<td>American Cheese</td>
<td>223</td>
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<tr>
<td>Swiss Cheese</td>
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<td>Monterey Jack</td>
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<td>Mozzarella</td>
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<td>Pepper Jack</td>
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<tr>
<td>Provolone</td>
<td>77</td>
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<tr>
<td>White Cheddar</td>
<td>32</td>
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</table>

Cheddar, the mostly widely made cheese in the world, unsurprisingly leads the list of top cheeses on breakfast handhelds. The texturally smooth and dense cheese is featured in a range of handhelds in the morning—from atop biscuit sandwiches to breakfast burgers to burritos. Because the flavor of cheddars can range from bland to pungent, operators can feature the cheese with a vast variety of proteins and other toppings. For example, The Laundry in Fenton, MI, features smoked cheddar with Latin ingredients like Mexican-spiced mushrooms, avocado and salsa on its “Hold the Meat” toasted breakfast sandwich, while sharp cheddar pairs with spicy fried chicken in a Southern-style The Brittany biscuit breakfast sandwich from The Roost Carolina Kitchen in Chicago.
In addition to cheddar, the other top cheeses on breakfast handhelds are also the more familiar varieties on menus overall. These leading cheeses represent an array of types, from pasta filata (e.g., mozzarella) to semifirm (e.g., cheddar) to semisoft (e.g., Jack); textures, from soft and spreadable (e.g., cream cheese) to crumbly (e.g., feta) to firm (e.g., provolone); and even color, from white to bright yellow. Despite these variances, each of these cheeses adds a creamy element to a breakfast handheld.

Vegetables
Since breakfast handhelds have few healthy components, vegetables serve as the nutritious part of these dishes. Different vegetables can lend varied flavor and textural accents to a breakfast handheld, from crisp, pungent raw red onions, to soft, spicy roasted jalapeño peppers, to smooth, earthy mushrooms.

Operators must also consider consumer preferences for vegetable preparation. Most consumers prefer cooked over raw vegetables; in fact, 39% of consumers said they consider raw vegetables to be very or somewhat appealing on breakfast handhelds, compared to 47% of consumers who said the same for cooked vegetables. Methods for cooking vegetables abound; roasted, sautéed, caramelized, fried, grilled and pickled vegetables are all fair game on breakfast handhelds.
Condiments and sauces are oftentimes the most flavorful element of a breakfast handheld. They provide a way for the diner to customize their handheld and can add spice, herbaceousness, fruitiness or succulence that oftentimes the bread/base, protein, cheese and vegetable cannot supply.

When looking at the list of top condiments and sauces on breakfast handhelds, we see a number of trends break out:

- **Ethnic Ingredients**—The widespread popularity of global flavors and ingredients has ethnic condiments and sauces also trending in breakfast handhelds. Salsa and pico de gallo—which are regularly highlighted in breakfast burritos and tacos—are also appearing in breakfast wraps and panini. Featured in the top three condiments/sauces on breakfast handhelds, these Latin ingredients are followed closely by Asian soy sauce and Italian pesto sauce.

- **Typical Lunch Fixings**—Condiments and sauces that are typically found on lunch sandwiches now top the list for breakfast handhelds. Mayonnaise, hot sauce, mustard and ranch all give a breakfast sandwich, burger, taco or burrito a savory bite with a bit of a lunch mashup crossover.

- **Sweet Flavors**—Breakfast handhelds needn’t feature only savory ingredients. Sweet flavors like jelly and honey are also popular condiments in the morning. These items are typical on toast, though are also featured atop bagel, biscuit and croissant sandwiches.
While these condiments and sauces will continue to trend in breakfast handhelds, opportunity exists for operators to think more outside the box. Here are some ways in which operators can bring excitement to the breakfast handheld condiment and sauce category:

Add fruit in an innovative way...
- Compote
- Fruit Spread
- Apple Butter

Bring a hint of formal dinner fare to breakfast...
- Aïoli/Rémoulade
- Savory Jams
- Hummus

Make it kid-friendly or nostalgic...
- Chocolate/Hazelnut Spread
- Fruit Spread Mash-ups
- Nut Butter

Ethnic Handhelds
Because global foods are trending, it’s no surprise that ethnic-inspired handhelds are also gaining more steam. Handheld foods from across the globe that are typically associated with lunch and dinner in other markets are now getting a morning twist with breakfast ingredients here in the U.S. And many of these items can be seen at American-focused restaurants that want to feature a taste of a different region, in addition to ethnic restaurants. Let’s take a look at three ethnic handhelds highlighted on morning menus:

- Breakfast Bao—This Chinese steamed and filled bun is typically small, served a few to a pack. At breakfast, baos can be stuffed with ingredients ranging from egg, bacon and cheddar to coconut custard. Operators may also pair breakfast baos with dipping sauces that traditionally accompany these flavors, such as maple syrup.

- Breakfast Empanada—These Mexican/Spanish specialties are usually single-serving turnovers with a pastry crust and a filling. At breakfast, an empanada’s stuffing can range from traditional Latin ingredients like peppers and avocado to standard breakfast ingredients like eggs and bacon.

- Breakfast Bánh Mì—Vietnamese bánh mì sandwiches traditionally feature a baguette stuffed with pâté, mayonnaise, cilantro, cucumber, jalapeño and pickled carrots and daikon. Most breakfast versions include fried or scrambled eggs, while other ingredients can range from proteins such as pork belly, ham or Vietnamese sausage; vegetables like jalapeños or kimchi; and condiments such as sambal or cream cheese.
Build-You-Own
There is ample opportunity for build-your-own options in the breakfast sector, with handhelds in particular offering unlimited possibilities for customization. Operators can offer create-your-own handhelds—allowing customers to choose the base, protein and toppings such as cheese and sauce—or feature handhelds with one or more customizable ingredients to keep operations simple while still giving patrons a chance to personalize their meal.

Benefits of the build-your-own format include...

...APEALING TO CUSTOMERS WITH DIETARY RESTRICTIONS by allowing them to customize their meal according to their preferences

...ADDING FRESHNESS, since create-your-own handhelds are made to order

...OFFERING VARIETY without developing and training staff on a lengthy menu of signature offerings

...PROVIDING AN INTERACTIVE EXPERIENCE by allowing customers to exercise their creativity and design their own meal

...ALLOWING FOR CONTROL over flavor and price

Operators who offer build-your-own options can still menu suggested or premade handheld selections for those who don’t have the time (or energy) in the morning to create their own meal. One simple way for operators to add a build-your-own component to their existing menu is to feature a condiments bar where patrons can choose their sauces or toppings for grab-and-go or signature morning handhelds.

On the menu
Egg and choice of cheese with bacon, ham or sausage on a choice of bagel at Bruegger’s Bagels
**Ingredients**

- 2 Tbsp. honey
- ½ cup pecans, chopped
- 36 slices French bread, sliced diagonally into ½-inch thick slices
- 2 ¼ cups Smucker’s® Peach Preserves (#316)
- 6 eggs, large, beaten
- 1 qt. milk
- 1 ¼ cups Crisco® Vegetable Oil (#17665)
- 4 ½ cups Smucker’s® Blueberry Syrup (#5682)
- 1 lb. cream cheese, softened

**Directions**

1. Combine cream cheese and honey in food processor bowl; mix thoroughly. Add pecans and pulse briefly to mix.

2. Spread 2 tablespoons each cream cheese mixture and Smucker’s® Peach Preserves evenly over 18 slices of bread; top with remaining bread to form sandwiches. Reserve.

3. Combine eggs and milk; whisk to blend. Reserve.

4. To prepare single service: Dip 1 sandwich in egg mixture to coat; drain excess. Brush preheated panini grill with 1 tablespoon Crisco® Vegetable Oil; grill sandwich until golden. Diagonal slice and place on plate. Serve with ½ cup Smucker’s® Blueberry Syrup in a ramekin.

**Nutrition Facts**

<table>
<thead>
<tr>
<th>Nutrition Facts</th>
<th>Serving Size: 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per Serving</td>
<td>% Daily Value*</td>
</tr>
<tr>
<td>Calories</td>
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<tr>
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<tr>
<td>Protein</td>
<td>11.5g</td>
</tr>
</tbody>
</table>

Per 1000 calories:

- Calories: 2000, 2500
- Fat: 90g, 120g
- Carbohydrate: 140g, 170g
- Protein: 100g, 130g

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs.

Calories per gram:

- Fat: 9
- Carbohydrate: 4
- Protein: 4
Technomic Takeaway:
3 Areas of Opportunity for Breakfast Handhelds

#1 PLANT-BASED PROTEINS
Vegan options are scarce in the breakfast handheld category; sandwiches that don’t have meat most always at least have eggs. Spotlighting soy-based products like tofu or other vegan favorites like nut butter can fill the blank space. Operators offering these plant-based proteins can tout their morning meals as better-for-you and protein-rich.

#2 CREATIVE PACKAGING AND PRESENTATION
The majority of consumers take breakfast handhelds on the go. Packaging and presentation of handhelds are key to a satisfied consumer. Beyond a classic bag or plastic container, nontraditional options exist, such as handhelds on a stick. Convenience-store operators in particular are using this method as a way to draw patrons who want to eat traditional fork-and-knife breakfast foods on the go. For example, Clark’s Pump-N-Shop serves a pancake on a stick.

#3 CUSTOMIZATION AND PERSONALIZATION
For many consumers, the ability to customize a meal is expected at today’s foodservice visits. One low-risk way to add a personalized component to breakfast handhelds is through condiments, sauces and spreads; more topping options will equate greater value to patrons. However, creating a sauce or condiment entirely from scratch can take time and money, so operators can kick retail condiments, sauces and spreads up a notch by enhancing them with other ingredients like herbs and spices as a quick and easy way to innovate. For example, chefs can heighten strawberry jam with lemon zest and fresh basil to spread atop an English muffin breakfast sandwich.