



FOODSERVICE

Breakfast Brief

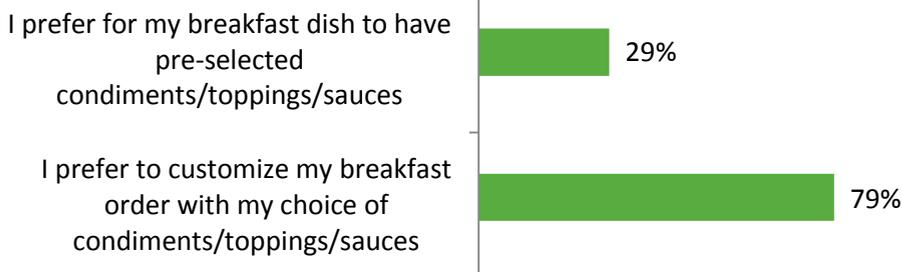
condiments, toppings and sauces

The breakfast daypart has greatly evolved over the past few years as operators find new ways to entice consumers to visit foodservice locations for their morning meal. One breakfast category that is particularly pushing the boundaries of innovation is condiments, toppings and sauces. Although these items typically complement a center-of-the-plate starch or protein, they are playing a vital role in helping to expand consumers' definition of what constitutes away-from-home breakfast occasions.

Serving Style

Breakfast consumers have clear ideas about how they want to have condiments, toppings and sauces presented to them. One of the top considerations for breakfast consumers is whether the service format allows for customization of their food as opposed to having condiments, toppings and sauces pre-selected for breakfast.

Please indicate how much you agree or disagree with the following statements about breakfast condiments/toppings/sauces. (Top two box = agree and agree completely)



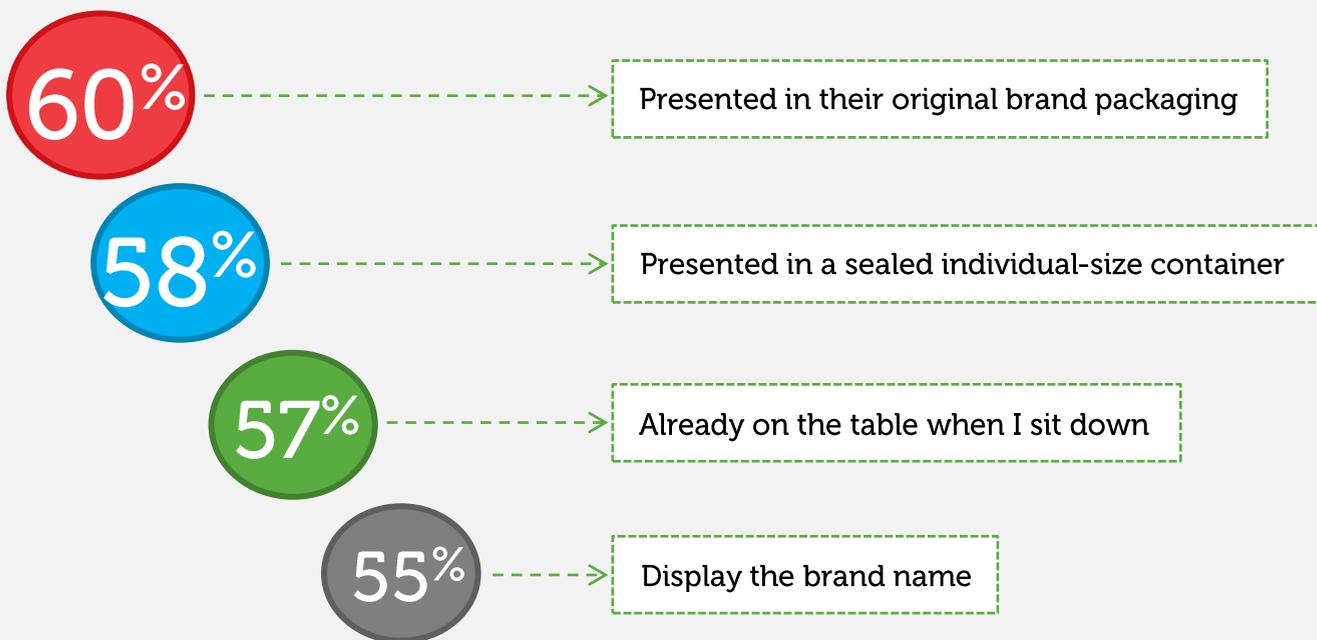
Base: 1,000 consumers aged 18+ who eat breakfast away from home on weekdays or weekends
Consumers indicated their opinion on a scale of 1-5 where 5 = agree completely and 1 = disagree completely



When it comes to condiments, toppings and sauces, customization is no longer a point of differentiation for restaurants—it's an expectation. Consumers truly expect to be able to have their main course and all of its accompaniments made to order and presented according to their specifications. Therefore, it's no surprise that they place a high importance on customization as well as a large variety of condiments, toppings and sauces when breakfast is served. To capture the attention of breakfast consumers, clear emphasis should be placed on the ability of the guest to pick and choose from among a broad assortment of preparations and products.

In addition, consumers don't want condiments, toppings and sauces to be displayed in open containers beforehand; instead, they're looking for these items to be presented in their original packaging (60%) or in a sealed individually sized container (58%). These preferences are likely guided by how consumers perceive freshness.

How important or unimportant are the following serving styles for condiments, toppings and sauces? (Top two box = somewhat and very important)



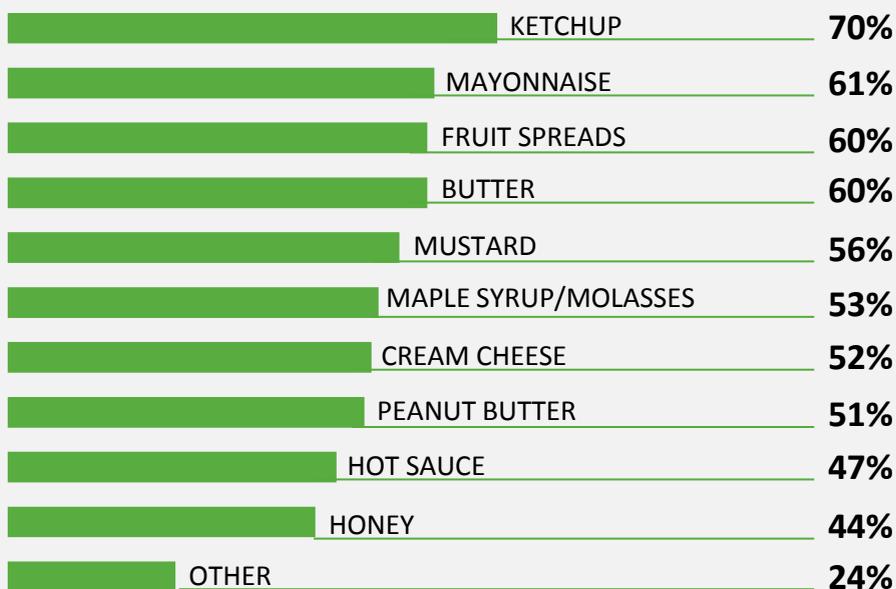
Base: 1,000 consumers aged 18+ who eat breakfast away from home on weekdays or weekends
Consumers indicated their opinion on a scale of 1–5 where 5 = very important and 1 = not important at all



The data also reveals that younger consumers place much higher importance on presentation. For example, 69% of respondents between the ages of 25 and 34 say that original brand packaging is important.

In regards to displaying the brand name, 55% of respondents think this attribute is very important or somewhat important for condiments, toppings and sauces. Taking a closer look at the weight of importance consumers place on the brand name for individual types of breakfast condiments, toppings and sauces, we see much variance. Name brands for certain items appear to carry slightly more weight with consumers than others.

How important or unimportant is it for restaurants to offer name brands for the following condiments, toppings and sauces? (Top two box = somewhat and very important)



Base: 1,000 consumers aged 18+ who eat breakfast away from home on weekdays or weekends
Consumers indicated their opinion on a scale of 1–5 where 5 = very important and 1 = not important at all

It's likely that consumers hold longstanding perceptions about a few select name brands—particularly those for ketchup, mayonnaise, butter and fruit spreads—and trust the quality level of these brands for use in their own home kitchens, as well as when they dine out.

Offering brands that have sustained a strong reputation for quality, flavor and other attributes can be instrumental in enhancing breakfast menus, but it will be vital to target brands that have the most impact with the restaurant's specific clientele.



Leading Condiments, Toppings & Sauces

Looking at the top condiments, toppings and sauces on chain and independent menus, we see much overlap between the two lists, yet a few distinct differences. Honey is the top breakfast condiment at chain restaurants, appearing mostly in yogurt parfaits and as a side for oatmeal and breakfast bowls. For independents, jelly leads the list as a topping for toast and bagels, as well as more innovative creations like a peanut butter-and-jelly crêpe at New York City's Cafe Jolie.

In addition, gravy is listed as one of the leading accompaniments for breakfast dishes at chains, but does not make the top-five list for independents. Most gravy incidences at chain restaurants refer to traditional white gravy, also dubbed "country gravy," which can feature sausage or bacon and is used to top classic entrées like biscuits. On the independent front, maple syrup is listed as a most-menueed condiment, appearing mainly as a topping for breakfast starches like pancakes, waffles and French toast.

There are more noticeable differences when looking at the fastest-growing condiments, toppings and sauces on chain and independent breakfast menus over a two-year period. Chain restaurants demonstrate a mix of innovative, nontraditional breakfast ingredients on the rise—such as chocolate sauce and salsa verde—and more traditional offerings like sausage gravy, jam and raspberry sauce. At independents, ethnic sauces and bolder flavors comprise the first three fastest-growing sauces, followed by mayonnaise and basil pesto—the latter of which appears in frittatas, omelets and breakfast sandwiches.



Top 5 Condiments, Toppings & Sauces

ON CHAIN MENUS

- 1 Honey
- 2 Salsa
- 3 Gravy
- 4 Hollandaise Sauce
- 5 Jelly

ON INDEPENDENT MENUS

- 1 Jelly
- 2 Hollandaise Sauce
- 3 Salsa
- 4 Maple Syrup
- 5 Honey

Source: Q1 2015 MenuMonitor, Technomic

Top 5 Fastest-Growing Condiments, Toppings & Sauces

ON CHAIN MENUS

- 1 Chocolate Sauce
- 2 Sausage Gravy
- 3 Jam
- 4 Raspberry Sauce
- 5 Salsa Verde

ON INDEPENDENT MENUS

- 1 Chipotle Sauce
- 2 Tomatillo Sauce
- 3 Hot Sauce
- 4 Mayonnaise
- 5 Basil Pesto

Source: Q1 2013–Q1 2015 MenuMonitor, Technomic



Flavor Innovation

Operators' experimentation with new condiments, toppings and sauces are transforming typical entrées—like omelets, pancakes and waffles—into something new, exciting and previously unseen at breakfast. Many of these new condiments, toppings and sauces showcase culinary creativity with different flavors, preparations and applications. These items also provide an opportunity for restaurants to invent signature accompaniments that have one-of-a-kind, craveable flavors.

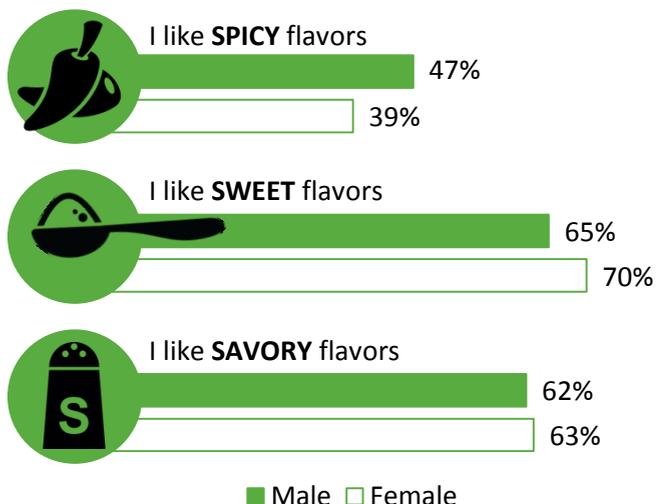
SAVORY, SWEET AND SPICY FLAVORS

When men and women were asked if they like sweet, savory or spicy flavors for breakfast condiments, toppings and sauces, similarities and differences clearly stand out for flavor preferences. Similarly, 62% of men and 63% of women strongly agree that they prefer savory flavors for breakfast condiments, toppings and sauces. One growing trend in savory breakfast accompaniments is savory jams, which are often featured on breakfast sandwiches and include flavors such as onion jam and bacon jam.

On the other hand, women were more likely than men to prefer sweet flavors (70% compared to 65%, respectively), while 47% of men strongly preferred spicy flavors, compared to just 39% of women.

How much do you disagree or agree with the following statements about breakfast condiments/toppings/sauces?

(Top two box = agree and agree completely)



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These differences point to opportunities to appeal to men through the introduction of hotter, pepper-tinged sauces as breakfast accompaniments. Women may also show some interest in these types of condiments, but will gravitate more directly toward sweeter toppings, such as flavored syrups and fruit or berry sauces.



FEATURED RECIPE

[Serving Size: 4 Fritters]

Ingredients

4 cups flour, all-purpose
 ¼ cup sugar
 1 Tbsp. baking powder
 2 tsp. salt
 8 eggs, large, separated
 2 cups milk, whole
 ¼ cup Crisco® Vegetable Oil (#17665)
 4 cups strawberries, fresh, diced
 1 cup Smucker's® Strawberry Preserves (#321)
 As needed, powdered sugar
 3 cups Smucker's® Strawberry Fruit Syrup (#5685)
 As needed, strawberries, fresh, whole

Smucker's Strawberry Fritters



Directions

- 1 Preheat fryer to 350°F.
- 2 Combine flour, sugar, baking powder and salt in bowl; mix thoroughly. Reserve.
- 3 Combine egg yolks, milk and Crisco® Vegetable Oil in bowl; stir in reserved flour mixture and mix well.
- 4 Beat egg whites until stiff; fold into batter with diced strawberries and Smucker's® Strawberry Preserves.
- 5 To assemble single serving: Drop four ¼ cup portions fritter batter into hot oil and deep-fry for 3 to 4 minutes or until golden. Drain.
- 6 Portion fritters on plate. Dust with powdered sugar. Drizzle 2 tablespoons of Smucker's® Strawberry Syrup over top; portion 2 tablespoons additional syrup in ramekin and portion on plate. Garnish with strawberries.

Nutrition Facts

Serving Size: (4 fritters)

Amounts Per Serving

	Per Serving	% Daily Value*
Total Fat	10.2g	%
Saturated Fat	2.4g	%
Trans Fat	0g	
Cholesterol	147.5mg	%
Sodium	551.1mg	%
Potassium	0mg	%
Total Carbohydrate	117.9g	%
Dietary Fiber	2.6g	%
Sugars	85.4g	
Protein	9.8g	

	Per Serving	Per Serving
Vitamin A	6%	Vitamin C 0%
Calcium	0%	Iron 0%

*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:	2,000	2,500
Total Fat	Less than	65g	80g
Sat. Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodium	Less than	2,400mg	2,400mg
Total Carbohydrate		300mg	375mg
Dietary Fiber		25g	30g

Calories per gram:
 Fat 9 Carbohydrate 4 Protein 4



On the menu



Buckwheat Pancakes with housemade jam and bourbon-barrel maple syrup at CBD Provisions in Dallas

SYRUPS

Syrup innovation is prevalent at full-service independent restaurants. Many new syrups feature spices and fruit flavoring—such as apricot, apple and orange—to provide different taste experiences for pancakes, waffles and French toast.

Independents are also offering spiked syrups with breakfast starches. These syrups are typically made with bourbon and offer a much bolder taste compared to traditional maple syrup.

BETTER BUTTERS

Another trend on the rise at independent breakfast spots is to call out the use of European-style cultured butter on menus as a replacement for traditional sweet-cream butter. To make cultured butter, the cream must be fermented or “cultured” before churning, allowing for bacteria to help create a more complex, tangier flavor and soft, spreadable texture. Independents are particularly highlighting the use of cultured butter on traditional morning breads, including croissants, toast and housemade pastries; in many of these instances, cultured butter is paired with sweet jams and preserves to provide a more balanced taste.

Chains and independents are also infusing butters with new and interesting flavors, and casual-dining operators have caught on to this trend as of late. These new butters provide multifaceted flavor dimensions for classic buttered morning dishes such as bagels and toast.

On the menu



Sweet Potato Pancakes with ginger butter at Snooze, an A.M. Eatery

Emerging Butter Flavors



Hazelnut



Cinnamon



Honey



Pecan



Apple



Bacon

What's next for butter? Expect this trend to trickle down to fast-casual chains, particularly bakery cafés that specialize in breakfast. These well-established morning destinations can use new butter varieties to further promote signature breakfast breads, many of which are made in-house daily to showcase quality.



On the menu



Chicken Biscuit Taco with jalapeño honey at Taco Bell

HONEY

Honey is already a staple breakfast condiment at chain and independent restaurants. It's often featured as a drizzle on a crêpe, a flavoring in yogurt and an add-in for hot tea or a smoothie. There are hundreds of honey types throughout the world for chefs to feature in breakfast dishes, and most are named for the flower from which they originate. Like many other condiments, toppings and sauces, the big trend in honey is flavor infusions. Some flavors appearing in honey include strawberry, lavender and jalapeño.

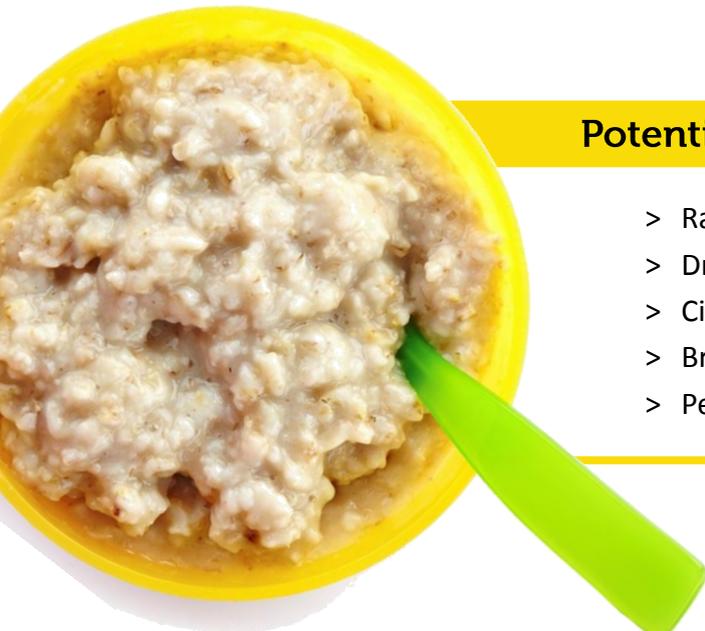
SEA SALT

Whereas table salt is usually highly refined and stripped of minerals, sea salt is made by evaporating seawater or water from saltwater lakes and can retain small amounts of its minerals, which add flavor and color to the salts. It is the remnant minerals that lead many consumers to perceive sea salt as more healthful than table salt, which is why many operators now highlight their use of sea salt as a way to appeal to health-conscious diners. The two salts have different mouthfeels too, with sea salt featuring a variety of coarseness levels.

On the menu



Hazelnut butter, sea salt and honey on toast at The London Plane in Seattle



Potential Oatmeal Toppings

- > Raisins
- > Dried Fruit
- > Cinnamon
- > Brown Sugar
- > Pecans
- > Granola
- > Preserved Fruit
- > Shredded Coconut
- > Maple Syrup
- > Honey



New Applications and Preparations

FRUIT SPREADS

Fruit spreads are highly versatile in terms of flavor and preparation. Some of the more common ways in which fruit spreads are featured on breakfast menus include as a stuffing in a doughnut and as a spread atop toast or biscuits. However, some restaurants are beginning to use fruit spreads in more nontraditional applications such as atop items like breakfast cakes, French toast, cornbread and pancakes. Operators can also blend fruit spreads into smoothies and frozen beverages, or even use fruit spreads in muffin batters. In addition, fruit spreads can simply serve as an added sweetness or color variant.

HOLLANDAISE SAUCE

Hollandaise sauce is moving beyond eggs Benedicts by now appearing as a flavor enhancement for other breakfast dishes, such as hashes. In addition, hollandaise sauce can complement breakfast tacos, breakfast sandwiches and savory crêpes on menus as a gourmet, indulgent ingredient. For example, IHOP’s Chicken Florentine Crêpes are filled with chicken breast strips, spinach, mushrooms, onions, Swiss cheese and hollandaise sauce to offer a savory, hearty dish for breakfast patrons.

HEALTHIER PREPARATIONS AND INGREDIENTS

Many consumers approach away-from-home dining occasions with health in mind. Because of this, diners are increasingly looking for “clean” foods on morning menus, meaning items that are unprocessed and free of additives and artificial ingredients. This explains why 50% of consumers place high importance on preservative-free condiments, toppings and sauces, and 46% say the same for non-GMO items.

How important or unimportant is each of the following when choosing a breakfast condiment, topping or sauce?

(Top two box = somewhat and very important)

Preservative-free	50%
Low sodium	47%
Non-GMO	46%
Lowfat	44%
Low sugar/sugar-free	44%
Low-calorie	41%
Made from scratch	41%
Made with local ingredients	40%
Gluten-free	29%

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One growing phenomenon at restaurants is the influx of made-from-scratch preparations, which 41% of consumers cited as important when eating a breakfast condiment, topping or sauce. The “scratch made” descriptor tends to convey quality and freshness for patrons, and consumers like the fact that these items are created with a chef’s expert touch. Several independent chefs make their jams, jellies and preserves in-house in order to showcase fresh, seasonal fruits. Other housemade items seen on breakfast menus include gravy, hollandaise, butter and crème anglaise.

There is also more movement at breakfast toward sourcing organic, local and natural ingredients for condiments, toppings and sauces. At leading independents, many breakfast entrées highlight the use of more wholesome ingredients such as organic granola, local honey and natural agave as a sweetener for some items.

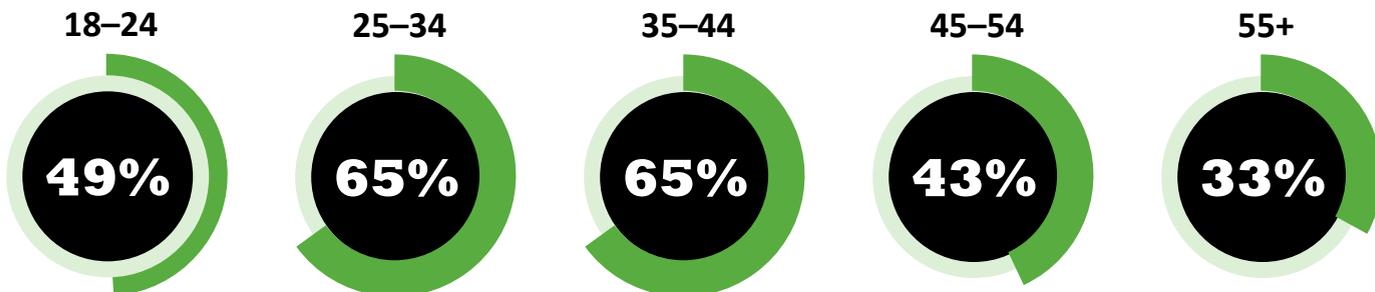
For restaurants wanting to showcase more housemade condiments, toppings and sauces, bringing these custom items out in bottles or jars with meals is one way to draw attention to culinary craftsmanship and product differentiation from the competition.

Ethnic at Breakfast

In general, younger consumers are more interested in trying bolder new flavors compared to Baby Boomers. Consumers between the ages of 25 and 44 strongly indicated that they’d be willing to try new and unexpected condiments, toppings and sauces for breakfast, which include spicy and ethnic-style options. And nearly half of consumers aged 18–24 also expressed an interest in more ethnic items and flavors to enhance morning dishes, showing a willingness from Generation Z to explore new offerings from global cuisines.

How much do you agree or disagree that you would like to see more ethnic items and flavors offered for breakfast condiments/toppings/sauces?

(Top two box = agree and agree completely)



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SRIRACHA GOES MAINSTREAM

When it comes to adding ethnic on menus, Sriracha (from Thailand) has particularly increased significantly on breakfast menus at both chain and independent restaurants. Over the past year, Sriracha rose 80% on breakfast menus and experienced a 24.2% increase on menus for all dayparts. The Thai chili sauce has gone mainstream by permeating Top 500 chain restaurant menus; for instance, Jack in the Box offers a Grande Sausage Breakfast Burrito that features the chain's creamy Sriracha sauce.

As chefs evolve Sriracha's role at breakfast, they are fusing it into more traditional breakfast condiments such as hollandaise sauce and mayonnaise. These flavor fusions give Sriracha a larger role at breakfast and help to create more standout dishes. At Eat'n Park, the South of the Border Stack features red and green peppers, Parma chorizo and onions served over grilled home fries, topped with two over-easy eggs, drizzled with Sriracha hollandaise sauce and served with toast.



South of the Border Stack at Eat'n Park

EMERGING SOUTHEAST ASIAN FLAVORS

As breakfast menus become more saturated with Sriracha mentions and consumers increasingly embrace heat in a variety of forms, independent restaurants are already seeking out the next emerging Asian flavors with potential to win over American consumers. Since interest in Southeast Asian flavors continues to increase, more and more independents are looking to newer and lesser known Asian condiments, toppings and sauces to differentiate breakfast menus. Expect to specifically see growth in incidence for gochujang, nuoc cham and sambal on independent restaurant breakfast menus in the coming year:



- Gochujang is Korean chile bean paste made from dried chiles, fermented soybeans, garlic and other seasonings. The spicy-salty paste can be sweetened with ingredients like sugar, syrup or honey, and variations can be created with the addition of such add-ins as pumpkin or sweet potato. The dark-red paste brings a nice visual appeal to a dish.



- Nuoc cham is a Vietnamese condiment of fish sauce, red chiles, garlic, lime juice, ginger and sugar, making it sweet, sour, salty and spicy. It can be featured as a dipping sauce or a drizzle. The pieces of chile and garlic floating throughout the orange-brown sauce bring a sense of authenticity to any dish.
- Sambal is a multipurpose condiment popular throughout Indonesia, Malaysia and southern India. It combines chiles, brown sugar, salt and oftentimes other ingredients, such as garlic, onion, galangal, tamarind, coconut milk and/or kaffir lime leaves. Like gochujang, it has a bright-red color that brings a visually interesting look to a dish, and like nuoc cham, the chunks of chiles and garlic make the dish more authentic. In addition, sambal can traditionally be served in a stone mortar, furthering the dish's authenticity.



Each of these ingredients can take the place of Sriracha in any breakfast meal; they can be featured on egg-centric dishes, incorporated into a hollandaise or used to marinate breakfast meats. But sambal shows the greatest potential for growth on menus in the coming year. Compared to gochujang and nuoc cham, sambal currently has the most mentions on restaurant menus tracked, and sambal incidence for all dayparts increased 10.7% year over year, according to Technomic menu data. Because the condiment is especially prevalent on traditional casual-dining menus, we can expect growth primarily in the full-service arena as it first enters the Top 500 chain market.



EMERGING NORTH AFRICAN FLAVORS

Emerging interest in North African flavors is starting to develop. Harissa, in particular, is a condiment to watch, increasing menu mentions in all dayparts 4.1% year over year, according to Technomic menu data. This fiery-hot sauce from Tunisia is usually made with hot chiles, garlic, cumin, coriander, caraway and olive oil, and is typically found on independent breakfast menus.



Moroccan flavors and ingredients are also popping up at independents. “Moroccan” mentions have increased 16.7% on breakfast menus at all restaurants year over year, showing sizeable growth in this trend. Stir Market in Los Angeles, for example, menus Moroccan Baked Eggs with merguez sausage, organic eggs, tomatoes, chickpeas, peppers and grilled bread for weekday breakfast.

Because North African flavors are less mainstream than Southeast Asian options, we probably won't see as many mentions on chain menus in the coming year; however, harissa is certainly an opportunity flavor for leading breakfast chains to watch, with potential to incorporate it into new LTOs down the line.

SALSA

Salsa is the second-most-popular condiment on U.S. chain breakfast menus behind honey, proving it's still a force to be reckoned with at breakfast. Salsa options are endless: spice profiles range from mild to extremely hot; it's available red, green or an array of other colors; and it can be made with a number of ingredients, from mango and pineapple to habanero and garlic. Operators have a plethora of ways in which to menu salsa and customize it if they are creating housemade versions.

Of all salsas, pico de gallo has seen the largest year-over-year increase of mentions on menus at 4.3%. The condiment is a relish of finely chopped ingredients like jicama, oranges, onions, bell peppers, jalapeño peppers and cucumbers, along with various seasonings.

Expect to continue to see an uptick in made-from-scratch salsas as diners increasingly become attracted to housemade creations. Also anticipate more sweet-spicy salsas in the chain realm, such as mango-habanero versions, to tempt diners' taste buds in the morning.





Technomic Takeaway:

5 Areas of Opportunity for Breakfast Condiments, Toppings and Sauces

#1

CRÈME FRAÎCHE

Crème fraîche, an ingredient combining whipping cream with buttermilk, is on the rise at independents. This matured, thickened cream has a slightly tangy, nutty flavor and velvety rich texture. With a thickness similar to that of commercial sour cream, it's typically served as a dollop atop a dish. Independents are particularly highlighting crème fraîche on dishes like oats, French toast, waffles and pancakes to add a lighter creaminess to these more starch-heavy dishes.



Since crème fraîche is not commonly seen on breakfast dishes at Top 500 chain restaurants, there is ample room for growth within this segment. Crème fraîche has appealing qualities that will help it flourish on chain breakfast menus: it can easily be made in-house requiring only two ingredients, and the white condiment can easily take on new flavor and ingredient infusions to add color, texture or more complex flavors to a dish.

#2

GRAVY

Gravy is a sauce that hasn't evolved much on breakfast menus. On occasion, an independent will offer a flavored gravy, but most instances on menus are the traditional country gravy. Chefs should try adding pepper to gravy, such as cayenne, to bring a kick of spice. Because gravy is one sauce that may not be appetizing to the eye, as it typically features a brown or white color, chefs can enhance gravy's look and taste by incorporating fresh herbs or spices like paprika or rosemary.



It's also important to mention that operators have a lot of room to experiment with gravy in breakfast dishes outside of traditional Southern recipes like biscuits and gravy. Because gravy is such a time-honored sauce, chefs can feature it in a variety of morning recipes. Replacing hollandaise with gravy in eggs Benedict, for example, is one way to surprise diners.



#3

DRIZZLES AND GLAZES

Fruity and sweet drizzles and glazes are an easy way to add flavor while giving dishes more of a visual appeal. These toppings can range in flavor from raspberry to cream-cheese icing to chocolate and vanilla syrupy drizzles. Because drizzles and glazes can be featured on anything from egg dishes like omelets to indulgent crêpes, pancakes, waffles and French toast, the opportunities for these toppings are endless at both chains and independents.



Chefs should use drizzles and glazes when they want to experiment with more innovative or opposing flavors. Because there is typically only a small amount of drizzle or glaze that goes onto a dish, sneaking in some bolder flavors is one way to stimulate taste buds. For example, drizzling a habanero sauce atop a lighter egg dish will add a tinge of spice without over-stimulating the diner.

#4

SAVORY JAMS

Mostly featured on lunch and dinner menus for burgers and sandwiches, savory jams have a lot of opportunity on breakfast menus. For one, operators can replace some of the savory components of many breakfast dishes with a savory jam. For example, bacon jam and tomato jam can substitute for bacon and tomato/ketchup, respectively, as a topping on breakfast sandwiches. The result is a similar flavor with a varied texture. Another opportunity for savory jams is as a topping for or filling in pastries.



#5

AÏOLI

Although traditionally defined as a strongly flavored garlic mayonnaise that accompanies fish, meats and vegetables, the definition of aïoli has expanded to include non-garlic-infused versions. Like most other breakfast condiments, toppings and sauces, aïoli can also be enhanced with the simple infusion of various flavors and ingredients, which provides significant room for growth of this condiment on breakfast menus.



Since aïoli has an upscale connotation (originating from the Provence region of southern France), opportunity lies at limited-service chains to use this condiment to increase their premium appeal. For all restaurants, creating large portions of a housemade aïoli that is served with meals may be one way to add both innovative flavor and upscale appeal to a simpler breakfast item.

