



Away From Home

Breakfast Brief



Breakfast Starches

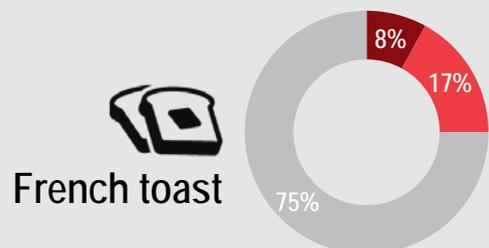
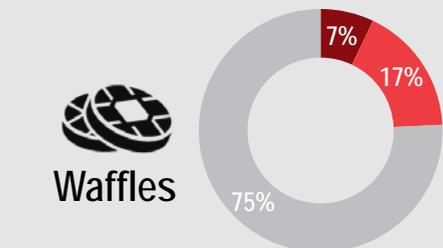
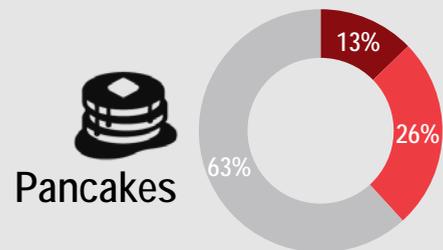
Breakfast starches like pancakes, waffles and French toast are such an integral part of the breakfast occasion for many consumers, and as such, they are customary items on operators' menus. Not only are these breakfast starches the ultimate morning comfort foods but they also appeal to both adults and kids alike. When it comes to breakfast starches, consumers express an interest in both traditional and new culinary versions. This makes breakfast starches ripe for innovation as more and more operators branch out with new preps and flavors.

Breakfast Starch Purchasing Behavior

When asked to think about their last 10 restaurant breakfast occasions, the majority of consumers who ordered a breakfast starch as a side or entree did so only up to three of those occasions.

Thinking about the last 10 restaurant breakfast occasions, how many times did you order the following breakfast starch as a side or entree?

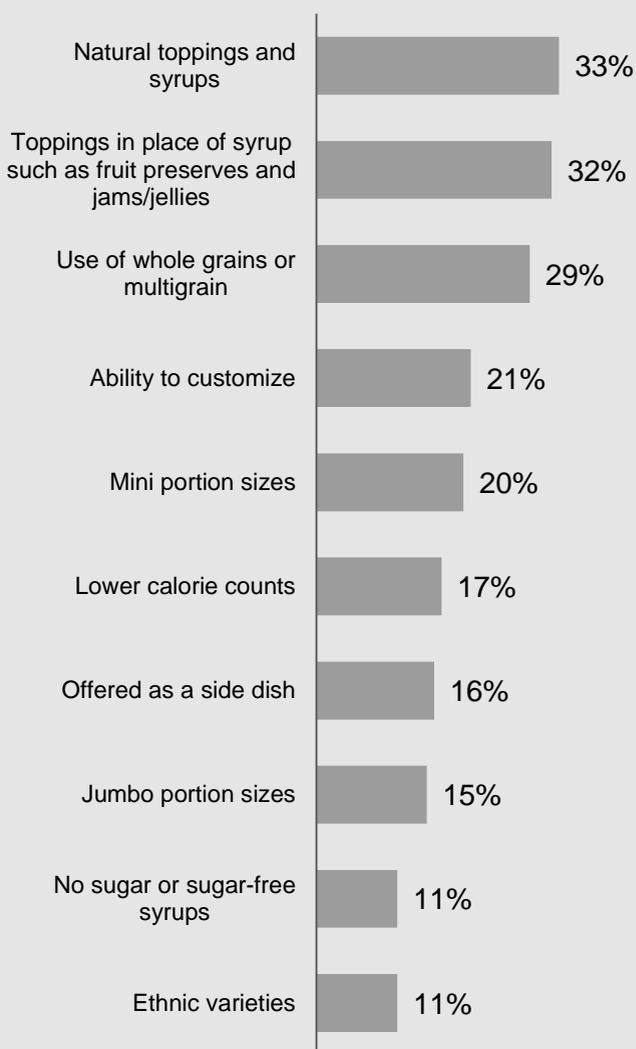
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Although breakfast starches were not ordered for every recent morning dining experience, nearly a quarter of consumers (26%) said they purchased pancakes for approximately half of the past 10 restaurant occasions. Trailing slightly behind, waffles and French toast were both ordered for nearly half of the breakfast occasions by 17% of consumers. And approximately one out of 10 consumers agree to ordering pancakes (13%), waffles (7%) or French toast (8%) at least seven of the 10 recent visits.

How could restaurants make pancakes, waffles and French toast more appealing during your breakfast occasions?

Top 10 answers shown.



Breakfast Starch Preferences

When asked how restaurants could make pancakes, waffles and French toast more appealing, nearly a third of consumers said natural toppings and syrups (33%) and toppings such as fruit preserves, jams and jellies in place of syrup (32%) would be appealing.

Breakfast starch enthusiasts also appreciate a plethora of sizes to choose from when it comes to pancakes, waffles and French toast, including jumbo and mini versions of these popular breakfast offerings. Smaller portions are particularly popular with younger generations, with more than six out of 10 Gen Zers (63%), millennials (68%) and Gen Xers (66%) stating that they like to dip mini pancakes, waffles or French toast in a variety of sauces and syrups. These mini portions are not only perfect for the on-the-go lifestyle of younger cohorts, but they can also serve as a breakfast or snack item for the children of these generations.



Base: 1,500 consumers aged 18+ who purchase food or beverage for breakfast at a foodservice location.
 Note: participants were asked to select up to three responses

Other ways operators can make breakfast starches more appealing:

- Experiment with a build-your-own menu of various fillings and toppings to satisfy the 21% of consumers who said customization would make breakfast starches more appealing
- Provide better-for-you options such as whole-grain or multigrain breakfast starches or sugar-free syrup to meet the needs of 17% of consumers wanting lower calorie counts
- Another way to allow consumers control is to offer mini portions (20%). This can allow for calorie control (17%) and customization (21%)



Breakfast Starch Flavors

More than eight out of 10 consumers (84%) like traditional maple syrup with pancakes, waffles and French toast, which demonstrates that classic pairings will always have a place on the menu. However, more operators are also dressing up batters and toppings with new flavors to differentiate these items from competitors. And consumers are responding favorably to new flavor infusions. Strawberry tops the list of most appealing flavor on or in breakfast starches, slightly beating out maple.

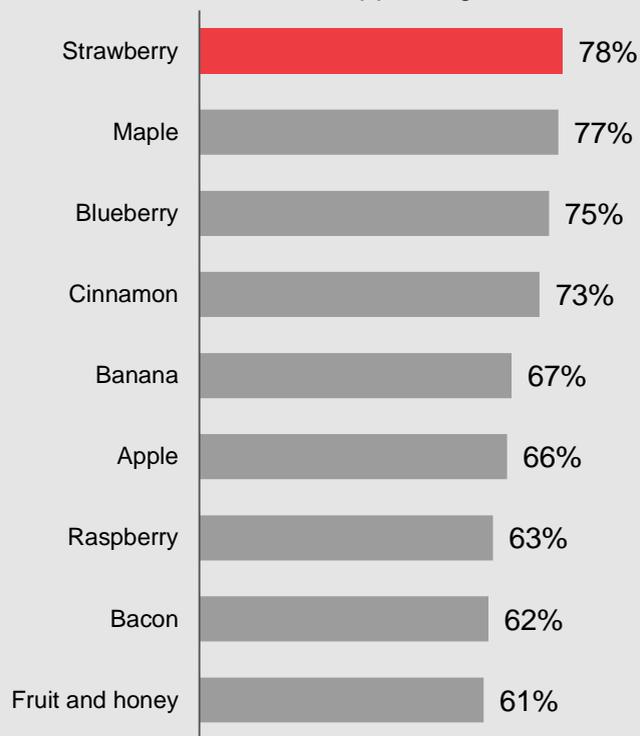
Since **73% of consumers like fruits or fruit-flavored condiments, toppings and sauces**

with pancakes, waffles or French toast, operators should consider serving jams, jellies, fruit-flavored syrups or whole fruit with breakfast starches.



How appealing are the following flavors on/in pancakes, waffles and French toasts?

(Top two box = very appealing and somewhat appealing)



Base: 1,500 consumers aged 18+ who purchase food or beverage for breakfast at a foodservice location. Consumers indicated their opinion on a scale of 1 to 5 where 5 = very appealing and 1 = not appealing at all



Other flavors in the top 10 list run the gamut of classic complements like blueberry and apple, and other options such as cinnamon and raspberry. Opportunity exists for operators to mix and match these leading flavors to create new appealing combinations for breakfast starches.

Incorporating dessert flavors is another trend happening with breakfast starches. Nearly three-fifths of consumers cite chocolate (59%), vanilla (59%) and cheesecake (57%) as appealing breakfast starch flavors, and more than four out of 10 respondents say the same of red velvet (46%) and birthday cake (41%).

Seasonal flavors for breakfast starches have also proven to be useful traffic drivers.

Flavor combinations to consider:



**BANANA
STRAWBERRY**



**BACON
MAPLE**



**CINNAMON
APPLE**



**MIXED
BERRY**

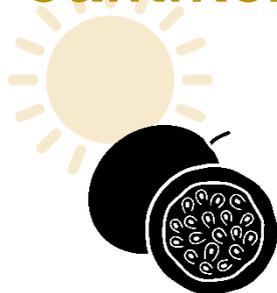
Seasonal flavors to explore:

Spring



- Pineapple
- Peach
- Blackberry

Summer



- Passion Fruit
- Rhubarb
- Lemon

Fall



- Pumpkin
- Apple Spice
- Pecan

Winter



- Peppermint
- Gingerbread
- Eggnog



1 Savory Interpretations

Although traditionally associated with sweet flavors, breakfast starches are featuring more surprising savory preparations to interest consumers and differentiate menus. Ingredients like herbs, cheese, egg and sausage are being baked into the batter or served atop in place of or as a complement to syrup.



On the Menu:
Babycakes Food Truck in Chicago offers many savory short stacks, including a Sausage Cheddar version

2 Waffle, French Toast and Pancake Sandwiches

Breakfast handhelds are no longer relegated to just bagel, toast and biscuit bases. Instead, more operators are stuffing breakfast fillings like eggs, bacon and cheese inside waffle, pancake and French toast bases. This innovation of pairing traditional savory and sweet morning ingredients to create interesting flavor combinations is part of the larger industry mashup movement.



On the Menu:
Pilot Flying J offers the option to use French toast or maple griddlecakes as the base for breakfast sandwiches

3 Portable Presentations

Once confined to the plate, breakfast starches are now showcasing on-the-go presentations. This includes pancakes on a stick, French toast strips, French toast or pancake balls, and mini pancakes or waffles. These preparation twists also make breakfast starches more appealing as shared offerings or snacking options throughout day.



On the Menu:
Toast in New Orleans serves Danish aebleskivers (puffed pancake balls) with powdered sugar and choice of sauce or jam



FEATURED RECIPE

Ingredients

- 2 cups Hungry Jack® Complete Extra Light & Fluffy Pancake & Waffle Mix (Just Add Water)
- 1 cup low fat granola
- 2 teaspoons grated orange peel
- 1 ¼ cups water
- Crisco Professional® Original No-Stick Cooking Spray
- 2.1 oz. Smucker's® Breakfast Syrup PC
- Butter



GRANOLA GRIDDLE CAKES



Directions

Step 1: COMBINE pancake mix, granola, nuts and orange peel in large bowl. Mix well. Add water. Stir just until large lumps disappear.

Step 2: HEAT griddle or skillet over medium-high heat. Lightly spray griddle with no-stick cooking spray. For each pancake, pour 1/4-cup batter onto hot griddle to form 4-inch pancake. Cook 2 to 3 minutes, turning when edges look cooked and bubbles begin to break on surface. Continue to cook an additional 1 ½ to 2 minutes or until golden brown. Serve with syrup and butter.





Technomic Takeaway: 3 Areas of Opportunity for Breakfast Starches

#1

BALANCE TRADITIONAL AND UNIQUE FLAVORS

Classic flavors like maple, strawberry and blueberry are well-loved and continue to be the most preferred for breakfast starches. But less traditional flavors also have growing appeal with consumers. Since fruit flavors particularly tempt consumers, operators should test less common fruits (e.g., passion fruit, mango, pear, etc.) and fruit blends with pancakes, waffles and French toast. Seasonal and dessert flavors on breakfast starches are also winning over consumers.



#2

QUALITY MATTERS

Consumer demand for quality extends to all types of breakfast foods, even more indulgent starches like pancakes, waffles and French toast. Satisfy this demand by showcasing natural and better-for-you ingredients. Displaying reputable household brands at the table, such as Smucker's syrups and jams, will also promote transparency and improve quality perceptions.

#3

EXPERIMENT WITH PORTION VARIETY

Today's consumers want more than just flavor assortments for breakfast starches—they also want portion variety. Smaller sizes play into trends like snacking and portion control, whereas jumbo sizes promote indulgence and shared occasions. Offering various pancake, waffle and French toast portions on the menu also aligns with the growing customization movement happening at breakfast.

