



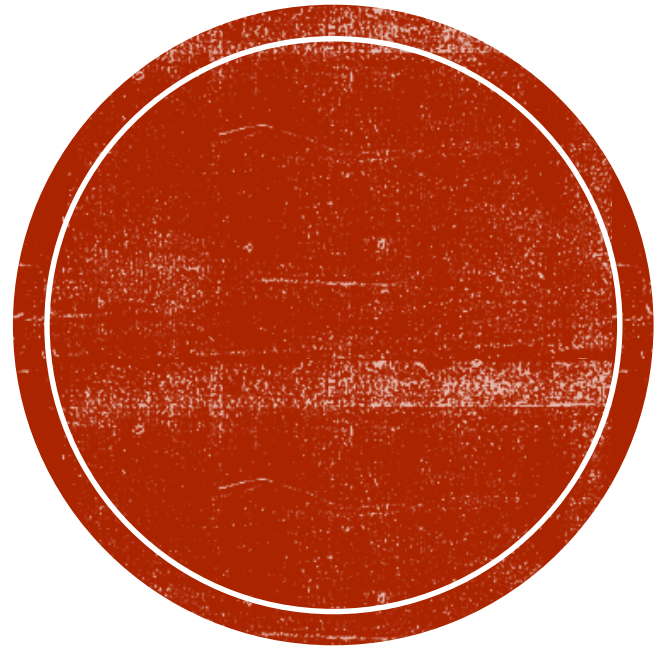
Beyond Avocado Toast: Breakfast Trends 2019

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BREAKFAST **TRENDS 2019**



**WE WILL DISCUSS
AND EMPOWER YOU
TO LOOK BEYOND
CURRENT TRENDS**

Topline Breakfast | Menu Penetration Time Trend



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	4 Year Growth
Chicken And Waffles	0.2%	0.3%	0.3%	0.5%	0.8%	1.2%	1.7%	2.8%	3.4%	4.2%	4.9%	192.1%
Shrimp And Grits	0.2%	0.4%	0.7%	0.7%	0.7%	1.0%	1.9%	2.6%	3.2%	3.8%	3.3%	76.5%
Taco	5.1%	6.1%	6.3%	6.3%	6.9%	7.2%	8.0%	8.3%	8.3%	9.9%	11.0%	37.1%
Chilaquiles	5.5%	6.0%	6.0%	6.8%	7.7%	8.2%	7.5%	8.3%	9.0%	9.8%	10.2%	35.8%
Pizza	4.0%	4.4%	4.4%	4.9%	5.1%	5.3%	5.8%	6.3%	6.3%	6.4%	7.0%	20.3%
Skillet	8.6%	8.3%	7.6%	7.6%	7.9%	8.4%	8.8%	8.7%	9.7%	10.4%	10.3%	17.5%
Enchilada	3.0%	3.3%	3.6%	4.0%	3.8%	3.8%	3.9%	4.2%	4.3%	4.5%	4.5%	14.1%
Parfait	4.4%	5.1%	5.5%	6.3%	7.6%	8.3%	9.1%	9.9%	10.3%	10.8%	10.2%	11.8%
Burrito	21.5%	22.4%	22.8%	23.7%	24.6%	24.9%	22.9%	22.8%	23.5%	25.2%	25.4%	10.8%
Yogurt	19.1%	21.7%	22.5%	24.3%	25.9%	27.3%	27.5%	29.7%	29.2%	30.3%	30.3%	10.0%
Waffle	28.6%	28.9%	28.5%	28.6%	27.7%	27.8%	27.2%	27.7%	28.7%	28.2%	29.0%	6.7%
Frittata	6.8%	7.8%	8.5%	8.6%	9.3%	10.2%	10.6%	12.0%	11.8%	11.6%	11.2%	5.2%
"Egg"	89.5%	90.0%	90.3%	91.5%	91.0%	91.6%	91.2%	92.2%	92.8%	93.2%	92.8%	1.7%
"Sandwich"	42.2%	43.1%	42.9%	44.7%	45.3%	46.6%	48.5%	50.0%	50.2%	50.5%	48.8%	0.5%
Biscuit & Gravy	13.9%	13.4%	13.1%	13.2%	12.6%	12.8%	13.0%	13.2%	13.7%	14.2%	13.1%	0.2%
Eggs Benedict	29.5%	32.4%	32.6%	33.8%	33.9%	34.1%	36.5%	36.3%	36.4%	36.3%	36.4%	-0.5%
French Toast	54.2%	55.8%	54.9%	54.3%	54.1%	55.2%	54.2%	53.6%	54.3%	54.6%	53.5%	-1.4%
Pancake	50.2%	49.8%	49.2%	49.5%	47.8%	48.6%	47.0%	46.0%	45.9%	45.8%	45.1%	-3.9%
Steak & Eggs	22.0%	23.0%	23.5%	23.4%	22.6%	21.9%	20.3%	21.1%	21.0%	20.0%	19.2%	-5.5%
Omelette	59.7%	60.8%	60.2%	60.3%	59.1%	59.4%	56.0%	55.1%	54.8%	53.9%	51.7%	-7.6%
Base size	1,103	1,173	1,194	1,152	1,197	1,201	1,243	1,249	1,331	1,355	1,378	1,243

**FOOD FADS ARE
USUALLY IDEAS THAT
ENJOY A QUICK
POPULARITY AND SOON
DISAPPEAR.
FADS ARE LIKE ROLLER COASTERS.**

ENJOY THE FAD ROLLER COASTER.



GROWTH SPIKES



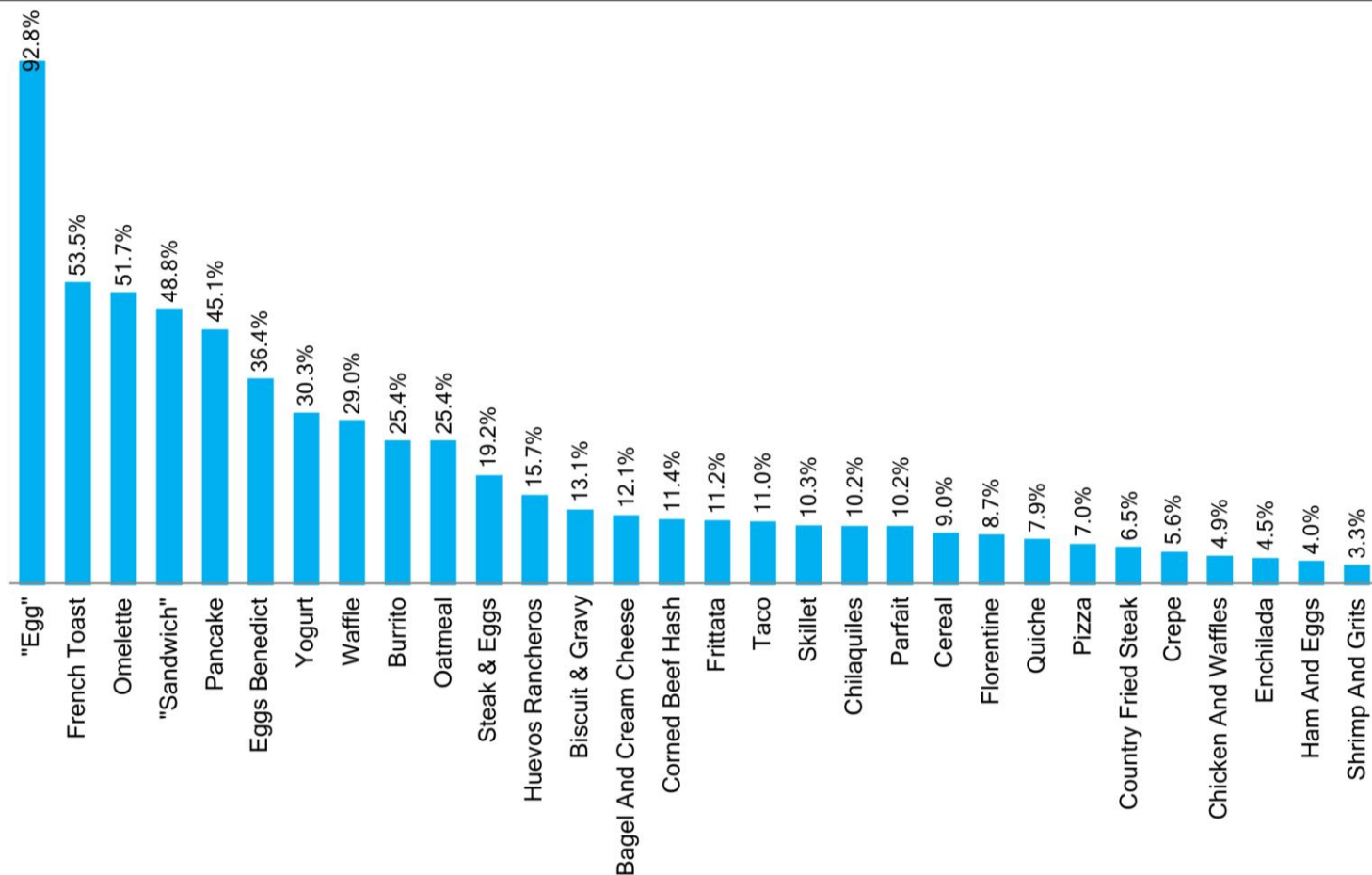
QUICK CYCLES



EXCITEMENT

**FOOD TRENDS ARE
WIDESPREAD CHANGES IN
FOOD PREFERENCES.
TRENDS PROVE TO BE
LONG-LASTING. FOOD
TRENDS OFTEN FIND A
PERMANENT PLACE ON
MENUS.
TRENDS ARE LIKE MERRY-GO-ROUNDS.**

Topline Breakfast | Menu Penetration



EMBRACE / CREATE TRENDS THAT SUSTAIN BUSINESS RELEVANCE



LONG TERM
GROWTH



REPLICABLE



TASTE MEMORY



De-mystifying food trends

- Who-
 - consumers...operators...athletes...vacationers...business travelers...families....expert chefs....novice chefs
- What-
 - experience...memories...satisfying...entertaining...beneficial...local...story
- When-
 - Timely...meal time...late....early...
- Where-
 - Here.....where you are
- Why
 - People need to eat, but food is much more than sustenance....This might be the best question to answer



CONSUMERS LOVE A GOOD STORY



BREAKING DOWN FOUR CURRENT TRENDS



Skillets



Carb fest



Smoothie
bowls/overnight
oats



Ethnic/regional

ETHNIC / REGIONAL

- Ethnic inspired
- Regional Cracker barrel
- Identity
- Memorable
- Relatable





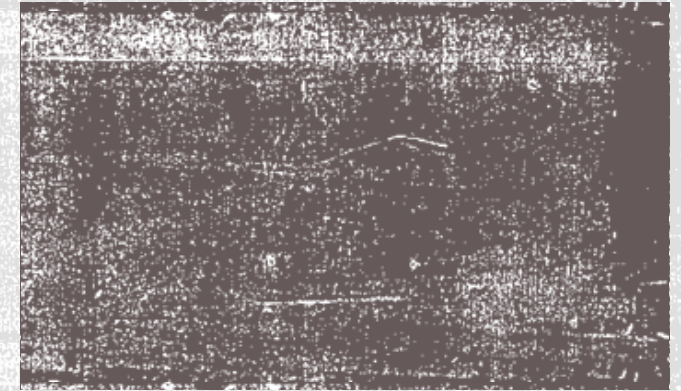
SKILLETS

- Breakfast skillets are a great way to combine variety of flavors, textures and aromas.
- Skillets are versatile and can be made to meet any of the fad type diets.
- Easy to produce and usually can be one dish meals.
- Presentation incorporates all of the senses including hearing.



SMOOTHIE BOWLS / OVERNIGHT OATS

- These offerings appeal to consumers looking for healthier and lighter options.
- Uncooked oats offer higher ratios fiber and resistant starch
- Refreshing alternative to very common breakfast offerings
- Easy to store and prepare





OVERNIGHT OATS

- $\frac{1}{4}$ cup rolled oats
- $\frac{1}{2}$ cup coconut milk
- $\frac{1}{4}$ cup frozen mango
- 1 tbs honey
- $\frac{1}{4}$ cup fresh berries
- 1 tbs shredded coconut
- Sprinkle of chia seeds



CARB FEST

- American favorite
- Comfort food
- Nostalgia
- Indulgent
- Endless possibilities



FINDING YOUR INVESTORS

- Do you!
- Take great ideas and make them personal
- Don't spend too much time trying to keep up with fads...use them for a quick ride...an LTO
- Understand what makes trends a steady bet...
- Write your story...answer the who, what, when, where and WHY.
- Create memories for long term investors in you.

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