



Packaged
Facts



David Sprinkle, Research Director
Packaged Facts
www.packagedfacts.com

Meat, Poultry, and Eggs: Culinary Trend Tracking Series Webinar

June 27, 2018

Foodie Is in the Details

THEMES

- Swap-in Innovation
- My Way vs. Hi/Lo, Chef/Street
- Healthful/Indulgence (#WorthIt)
- Local to Global/Traditions & Fusions
- Sustainability

TRANSLATIONS

- Put an Egg on It/Breakfast All Day
- All Meats Are Breakfast Meats
- Handheld vs. Bowlfood
- Reds vs. Whites
- Alternative Takes & Cuts: Lesser Nobility



**Rib Eye of American Wagyu Beef
with Seared Foie Gras**
Bouchon Bistro (Yountville, CA)
thomaskeller.com/bouchonyountville



Deputy Dog
(w/North Carolina pulled pork,
chilli vinegar mop, chipotle bbq sauce,
melted cheddar)
Oh My Dog (London)
omdhotdogs.co.uk

Eggs & Breakfast All Day

“In the last two weeks, at what times of day have you eaten cold breakfast cereal?”
(U.S. Adults Age 18-34)

Early morning/breakfast time	80%
Mid morning	44%
Mid day/lunch time	27%
Mid afternoon	26%
Early evening/dinner time	23%
Late evening	18%



The percent who agree that breakfast is the most important meal a day has notched down somewhat from 57% in 2007 to 52% in 2017. Even so, breakfast still beats the pancakes out of lunch (18%) or dinner (19%) by this measure.

Indulgent Swap-Ins



Southern Benedict

(bbq pulled pork, poached eggs,
spicy Hollandaise)

Spoons Café (Baltimore)
spoonsbaltimore.com



Pancakes, Bacon, Fried Egg

(with Runny Yolk)

EatBar (Washington, DC)
eat-bar.com



Cornbread Waffle w/

Breakfast Sausage, Fried Egg

(fried green tomatoes, cane syrup)

The Mill (Brandon, FL)
themillrestaurants.com/brandon

Healthy Halo, Indulgent

Biscuit Menuing Rates, 2013–YTD 2018

	Overall	Casual
2018	13.6%	14.5%
2017	13.3	14.7
2016	12.7	13.5
2015	12.0	12.3
2014	11.4	11.4
2013	10.9	9.6



Buttermilk Biscuit w/ Anderson Farms Sausage
 (Piedmont Provisions rosemary habanero jam,
 Full Moon Athens micro greens,
 Pastures of Rock Creek egg and cheddar cheese)
 Farm Cart (Athens, GA)
athensfarmersmarket.net/farm-cart/



Ol' Dirty Biscuit
 (fried chicken, sausage gravy, dill pickles,
 smoked pimiento cheese)
 Ace Biscuit & Barbeque (Charlottesville, VA)
acebiscuitandbarbecue.com





Innovation at Work: Successful innovation often involves a compelling balance between the old and the novel. With this grilled-marked and deliciously stacked breakfast sandwich, Meat Cheese Bread in Portland, Oregon wins you over on the comfort food scored at a glance, yet adventure is definitely baked in with grilled bread pudding as the carrier, and with shaved fennel and pear habanero hot sauce tucked in between the maple sausage and fried egg. There's flavor, texture, artanship, and indulgence in one trendsetting breakfast-and-beyond handheld.

meatchesebread.com

Global Influences



Barbacoa Benedict
First Watch Café (chain)
firstwatch.com



**Open-Faced Chicken Mole Biscuit
w/ Fried Egg**
Araña Taqueria y Cantina
(New Orleans)
aranataqueria.com



Brunch Banh Mi
(Vietnamese-style Baguette ,
Aromatic Chicken Sausage,
Pickled Carrot & Daikon, Spicy Mayo,
Cilantro & Two Fried Eggs)
E.P. & L.P. (Los Angeles)
eplosangeles.com



Breakfast Bao
Momofuku Noodle Bar
(New York City)
noodlebar-ny.momofuku.com

Breakfast & Indulgent Bowls

Fast Casual Breakfast Bowl Menuing Rates, 2012–YTD 2018

2018	11.4%
2017	4.8
2016	6.0
2015	4.7
2014	2.3
2013	2.6
2012	0.0



Hangover Bowl
(braised short rib , grits,
caramelized pearl onions,
crispy garlic, poached egg)
Willa Jean (New Orleans)
willajeans.com



Mi & Yu Noodle Bar
miandyunoodlebar.com
(Baltimore, MD)

Mi & Yu Noodle Bar Menu

Eat In or Carry Out

Noodle Bowls

buttermilk brined fried chicken / 13.25 (gf)

herbed meatballs / 13.50

(contains pork products)

fried thai curry shrimp / 14.50 (gf)

roast duck carnitas / 14

5 spiced bbq pork belly / 14

soy-miso beef short ribs / 15

vegetarian bowl, seared tofu

(available in vegetarian broth) / 12 (gf)

Chilaquiles and Migas: Beyond the Breakfast Burrito

Chilaquiles Menuing Rates, 2008 – YTD 2018

	Midscale	Casual
2018	12.1%	15.1%
2016	10.7	12.9
2014	8.7	11.2
2012	7.1	12.0
2010	4.7	10.8
2008	3.6	9.8



Chilaquiles Verdes

El Pescador Restaurants
(California Chain)
elpescadorrestaurants.com



Chilaquiles

(tomatillo salsa verde, crispy corn tortillas,
sautéed zucchini and corn, heritage beans,
cotija, lime crema)
Nourish Kitchen & Bar (New York City)
nourishkitchentable.com



Migas

eatingwell.com





Okonomiyaki with OtaJoy Sauce

Otafuku Foods

otafuku.com

Slow-Cooked/Sous Vide Eggs



**Bacon & Gruyere Sous Vide
Egg Bite at Starbucks**
starbucks.com



**Onsen Egg, Sweet Mushroom Soy,
Laffa Bread**
Sparrow + Wolf (Las Vegas)
sparrowandwolflv.com



Sous Vide Egg with Duck Confit
Foxcroft & Ginger (London)
foxcroftandginger.co.uk



**Cup noodles fried and
topped with spam,
sous vide egg, nori**
Off the Grid (San Francisco)
offthegrid.com

Deviled Eggsplosion

Deviled Egg Menuing Rates, 2008-YTD 2018

2018	4.0%
2016	3.4
2014	2.9
2012	2.2
2010	1.7
2008	1.6



**Pimiento Cheese
Deviled Eggs**

Southern Bite Cookbook



Deviled Eggs

(dill, chives, smoked trout roe)
Yardbird Southern (Miami)
runchickenrun.com



**Deviled Eggs
"Cacio e Pepe"**

Cure (New Orleans)
curenola.com



**Beef Tartare, Deviled Egg,
Bone Marrow**

Ardent (Milwaukee)
ardentmke.com



Beef Short Ribs as Slow Food

Beef Short Rib Menuing Rates, 2008-YTD 2018

2018	4.0%
2016	3.4
2014	2.9
2012	2.2
2010	1.7
2008	1.6



Brontosaurus Flintstone Beef Rib

Pubbelly (Miami)
thepubbellygroup.com



Short Rib Gyoza
Pubbelly (Miami)
thepubbellygroup.com

Beef Short Rib on Brioche

Black Sauce Kitchen
(Baltimore)
blacksaucekitchen.com



**Short Rib
Chilaquiles**
(avocado, duck fat
fried egg)
BossCat Kitchen
(Newport Beach, CA)
bossckitchen.com



Burgers Drop the Rule Book

Bison Burger Fast Casual Menuing Rates, 2010-YTD 2018

2018	5.7%
2016	6.0
2014	4.0
2012	1.9
2010	0.0



Korean BBQ Braised Beef Short Rib Bulgogi Burger

(housemade BBQ sauce,
zucchini-carrot kimchi,
cheddar, mixed greens)
Hamilton Tavern (Baltimore)
hamiltontavern.com



Bison Burger

Bison Burger (Los Angeles)
bisonburgertruck.com



Chargrilled Lamb Burger

(feta & thrice cooked chips,
served w/ cumin mayo)
The Breslin (New York City)
thebreslin.com



Moga Rice Burger

(rice burger
w/ kobe beef patty
& Moga teriyaki sauce)
Bar Moga (New York City)
barmoga.com

Meatballs on a Roll

Meatball Fine Dining Menuing Rates, 2008–YTD 2018

2018	29.1%
2016	27.8
2014	27.5
2012	21.6
2010	19.4
2008	18.3

Meatball Shop
(New York City)
themeatballshop.com



Bulgogi Meatballs
Everyday Korean
Cookbook

**Tomato-Coconut
Tandoori Meatballs**
Rook (Indianapolis)



**Meatball Slider
with Foie Gras**
Salt Tavern
(Baltimore, MD)

Eggs & Breakfast All Day: Ham & Bacon



**Breakfast Donut w/Country Ham,
Egg, Basil Hollandaise**
Sidecar Donuts
(Santa Monica, CA)
sidecardoughnuts.com

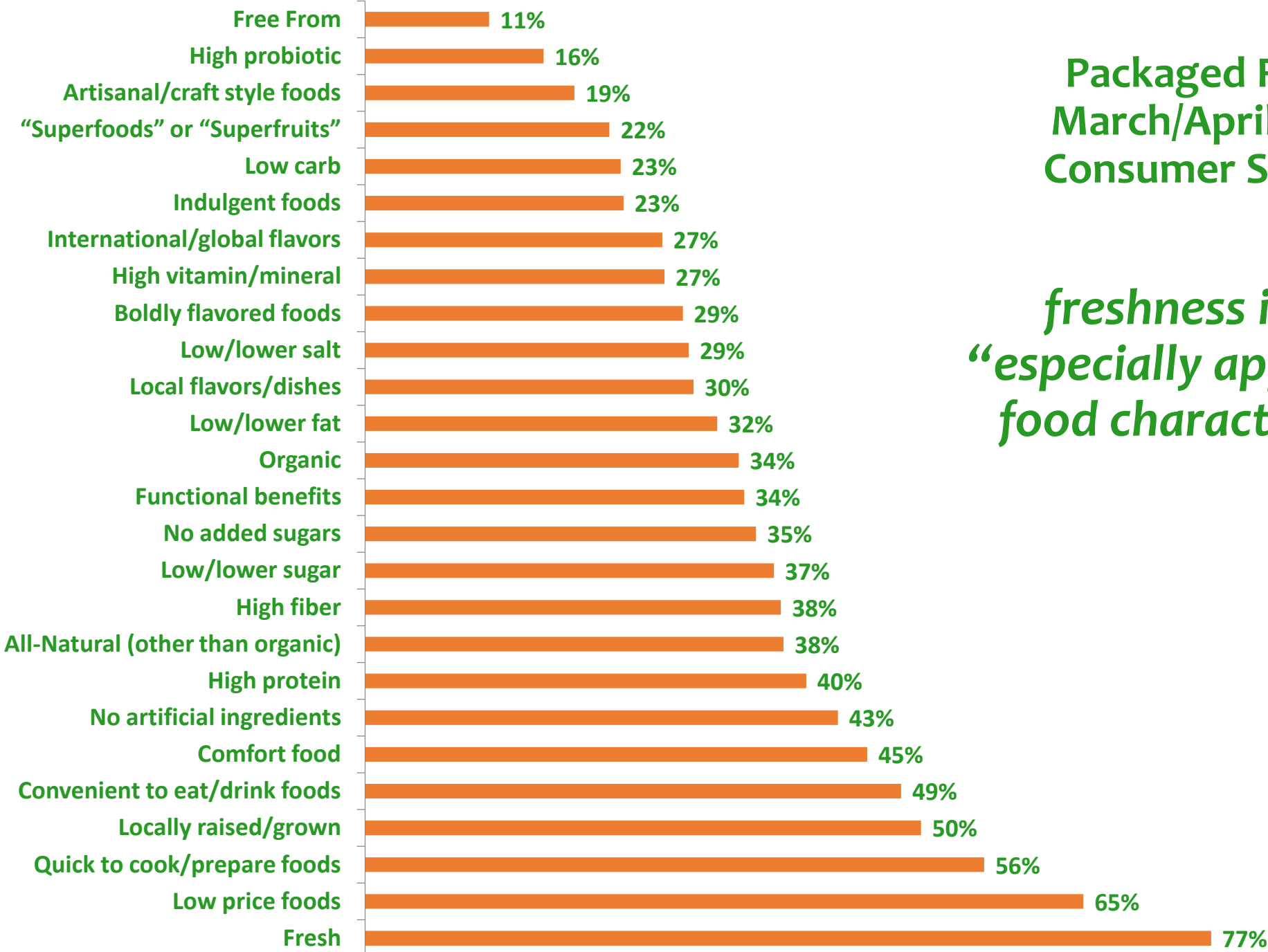


Monte Cristo Donut
(Black Forest ham, Emmenthaler and
American cheese, raspberry-cranberry jam)
Donut Bar (San Diego)
donutbar.com



Maple Bacon Donut
(Black Forest ham, Emmenthaler and
American cheese, raspberry-cranberry jam)
Union Square Donuts (Chicago)
unionsquaredonuts.com

Packaged Facts March/April 2018 Consumer Survey



*freshness is top
“especially appealing”
food characteristics*

GOURDOUGH'S *Austin, Texas*



DONUT SANDWICHES

➔ SERVED WITH FRIED YUKON CHIPS

THREE LITTLE GUIDOS

BROWN SUGAR & CRACKED BLACK PEPPER RUBBED BACON, FRESH BASIL, MOZZARELLA, SLICED TOMATO & BALSAMIC REDUCTION, SERVED OPEN FACED

DIRTY BIRD

LEMON PEPPER CHICKEN BREAST GRILLED WITH TOMATO, SPINACH, FRESH PESTO, MOZZARELLA AND GRILLED RED PEPPERS

PHAT CLUB

OVEN ROASTED TURKEY BREAST, BACON, HAM, PROVOLONE & MUESTER PILED HIGH WITH CILANTRO, TOMATO & GARLIC

BACON ME CRAZY

LOADS OF BACON, PROVOLONE CHEESE, GUACAMOLE, CILANTRO, TOMATO, RED ONION & GARLIC MAYONNAISE

SEAFOOD PO' BOY

CHOICE OF BEER BATTERED FRIED OYSTERS OR SHRIMP, SHREDDED LETTUCE, TOMATO, RED ONION & CREOLE REMOULADE

DONUT ENTRÉES

➔ SERVED ATOP A PIPING HOT DONUT

DIRTY SOUTH

HAND BATTERED CHICKEN FRIED STEAK, POTATO PANCAKE, CREAMY WHITE GRAVY & CRANBERRY HABAÑERO JAM

COUNTRY CLUCKER

CRISPY FRIED CHICKEN BREAST, POTATO PANCAKE, WARM CREAM CORN & CANDIED JALAPEÑOS

THE BALLPARK

SMOKEY DENMARK JALAPEÑO SAUSAGE, TOPPED WITH FRITOS, HOUSEMADE CHILI, FRESH GRATED CHEDDAR AND A SIDE OF STONE GROUND MUSTARD

MOTHER CLUCKER

HAND BATTERED FRIED CHICKEN BREASTS & HONEY BUTTER

GRANDMA'S DUMPLINS

SLOW COOKED CHICKEN & DONUT HOLE DUMPLINGS SERVED WITH PEPPER VINEGAR & A GARLIC DONUT ON THE SIDE



Taco de Cochinita Pibil

(slow-roasted pork with achiote taco; Mexico City)

tacos-de-cochinita.negocio.site



Me Gusta Tacos (Las Vegas)
megustatacos.com



Pork: The Belly of the Feast

Pork Belly Menuing Rates, 2008–YTD 2018

	Casual	Fine
2018	13.2%	21.0%
2016	11.0	17.3
2014	8.2	18.1
2012	4.0	12.0
2010	1.2	8.6
2008	0.6	6.9

**Pork Belly
Eggs Benedict**
Fork and Wrench
(Baltimore)
forkandwrench.com



**Pork Belly Poppers w/
Pepper Jelly Glaze**
Frey Smoked Meat
(New Orleans)
freysmokedmeat.com

**Slow Roasted
Pork Belly Grillades
w/ Cheesy Grits**
Maypop (New Orleans)
maypopresdtaurant.com



**Clove-Glazed Berkshire
Pork Belly**
(roasted & pickled beets,
housemade ricotta,
beet greens, sorrel)
Seaworthy (New Orleans)
seaworthynola.com



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Food Innovation Grid

Innovation Scale	Consumer Needs	Menu Item/Product Positioning
Rethink (new direction)	Values Expression	Values Conscious Transparency Fresh Global Foods Local Foods Artisanal/Chef
Remix (fusion)	Self Expression	Functional Superfood Nutrition Health Halo
Crossover (twist)	Experiences	Real Organic/Natural Free-From
Variation (tweak)	Affiliation	Taste Adventure Indulgence Comfort Food Novelty
	Self-Care	Convenience
	Safety	Value Priced



Pork belly can stand on its own, but it's also perfect for adding a flavorful touch of fatty indulgence as well as comforting familiarity to this cheffy mashup of monkfish with littleneck clams, pork belly, Carolina gold rice and kimchi broth at **Woodberry Kitchen** in Baltimore. Abundant herbs add a fresh, healthy touch that links to the superfood appeal of the kimchi.

woodberrykitchen.com



Fried Chicken Is Red Hot



Hot Fried Chicken & Biscuit
Brwnbread (Baltimore)



Spicy Fried Chicken Sandwich
Blue Oak BBQ
(New Orleans)
blueoakbbq.com



Hot Chicken Dinner
Hattie B's (Nashville)
hattieb.com



Nighthawk Breakfast Bar
(Los Angeles and Chicago)
Fried Chicken with Gravy Biscuits

**Fried Chicken
Fine Dining
Menuing Rates,
2008-YTD 2018**

2018	29.1%
2016	28.1
2014	25.1
2012	27.3
2010	24.2
2008	23.4



Korean Fried Chicken
Jubo (London)



Nagoya Style Spicy Chicken
Tori Shin (New York City)
torishinny.com

Piled High Chicken Thighs



Organic Chicken Thighs
(with crispy skin,
creamy leek & garlic sauce)
City Kitchen (Sacramento)
citykitchensacramento.com



Chicken Chops
(rum flambe, gram flour,
chutney)
aRoqa (New York City)
www.aroqanyc.com



Chicken Thighs alla Cacciatora
(peppers, onion, porcini,
tomato, poached potatoes)
Barbacoa (San Francisco)
barbacoasf.com



Pollo al Ajillo
(slow-cooked chicken thigh
w/ black garlic)
Bazaar by Jose Andres
(Miami Beach)
[sbe.com/restaurants/brands/
thebazaar](http://sbe.com/restaurants/brands/thebazaar)

Foie Gras & Chicken Livering It Up

Fine Dining Menuing Rates, 2008-YTD 2018

	Foie Gras	Chicken Liver
2018	24.9%	10.5%
2016	22.5	9.3
2014	20.5	12.1
2012	17.4	9.3
2010	17.5	5.7
2008	18.0	6.3



Sautéed Foie Gras

(green apple puree,
dashi-yuzu broth)

Jean-Georges (New York City)
jean-georges.com



Foie Gras Poutine

Jack's Bistro (Baltimore)
Jacksbistro.net



Fried Chicken Livers

Cracker Barrel Old Country Store
www.crackerbarrel.com



Toast with Chicken Liver

(green tomato, cocoa)
Rolf & Daughters
(Nashville)
rolfanddaughters.com



hinckleymeats • Following
Hinckley's Fancy Meats

hinckleymeats Terrine of Trotters, Tails & Truffles getting gift wrapped. #nytimesfood #giftguide #charcuterie #terrines #foodie #nyt #chefsfeed #decadence #truecooks #eater #fancy #entertaining #meat #delivery #shipping

travelingpoodle Impressive content!



60 likes

JANUARY 6

Add a comment...



Duck Makes a Bigger Splash

Duck Casual Dining Menuing Rates, 2008–YTD 2018

2018	27.2%
2016	27.1
2014	25.3
2012	22.3
2010	19.7
2008	20.3

Duck Breast

(Moroccan spices, Mission figs, huckleberries, brioche)
Batard (New York City)
batardtribeca.com



Slow-Roasted Half Duck

(blackstrap molasses
bbq sauce,
dirty rice & cracklins)
Hominy Grill
(Charleston, SC)
www.hominygrill.com

Duck Wings

The Nickel Taphouse
(Baltimore)
nickletaphouse.com



Dungeness Crab Deviled Duck Egg

(curried aioli,
potato gaufrette)
Waterbar (San Francisco)
waterbarsf.com

Charcuterie: A Cut Above

Charcuterie Menuing Rates, 2008-YTD 2018

2018	27.2%
2016	27.1
2014	25.3
2012	22.3
2010	19.7
2008	20.3

**Spanish
Charcuterie Plate**
(featuring Iberico ham)
Ovenbird (Birmingham)
ovenbirdrestaurant.com



Torchio, 'Nduja, Peas
Lolita (Portland, ME)
lolita-portland.com/



**Beef & Broccoli
Carpaccio**
Lobo (Baltimore)
lobofellspoint.com



Rabbit Rillettes
Bouchon Bistro
(Yountville, CA)



**Housemade Spam, Portuguese Sausage,
Duck Adobo Rilette**
Latitude 29 (New Orleans)
latitude29nola.com



**House Pork Garlic Sausage,
Resurrection Ale-
Braised Crispy Pork Belly**
Brewer's Art (Baltimore)
brewersart.com

Harvest Sausage Cassoulet
Chaval (Portland, ME)
chavalmaine.com

**Sausage of the Day:
Coconut, Ginger, Chicken & Pork**
(roasted papaya, sesame,
mint & honey relish)
Banger's Sausage House & Beer
Garden (Austin)
bangersaustin.com





Housemade charcuterie speaks to artisanship and indulgence. When it's offered as part of an assortment like this one from **Rustic Canyon**, a wine bar in Santa Monica, CA, it also offers novelty and adventure in a format that's perfect for sharing. Shown are 'nduja (top left) and duck rillettes (second from bottom right), as well as mortadella, chicken liver, gribenes, cotechino, pork butter, and house mustard, pickles, and green tomato chutney.

rusticcanyonwinebar.com

	Age 18-34 (Millennials/ Gen Z)	Foodies	Eating Healthier	HH Income: \$100K+
HOT DOGS: TYPES EATEN MOST OFTEN				
All Chicken	119	81	89	61
All Pork	117	68	89	75
All Turkey	111	102	102	95
Vegetarian	104	200	122	126
All Beef	84	81	98	99
SAUSAGES: TYPES EATEN MOST OFTEN				
Chicken	109	138	106	102
Turkey	100	130	103	105
Beef	96	84	89	88
Pork	89	82	95	99

Simmons Market Research
Winter 2017/2018
Consumer Survey

usage indices
adult norm = 100



Alternative Cuts: Lesser Nobility

Pork Shoulder Menuing Rates, 2008–YTD 2018

2018	3.9%
2017	3.5
2016	3.4
2015	3.2
2014	2.7
2013	2.1
2012	1.6



Slow-Braised Pork Shoulder
Lazy Dog Café
lazydogrestaurants.com



Osso Buco (sous vide)
Cuisine Solutions
cuisinesolutions.com



Lamb's Neck Ragout
(w/ ricotta gnocchi)
Lucques (Los Angeles)
lucques.com



Pig's Head Platter
B&O Brasserie (Baltimore)
bandorestaurant.com

Grilled Skirt Steak
(crushed fried Potato)
Horseradish-Mint Cream
Baco Mercat (Los Angeles)
bacomercat.com



Slow-Braised Oxtail & Beef Tongue Curry
Whole Wheat Noodles
Marjie's Grill
(New Orleans)
marjiesgrill.com



Toron Sandwich
(oxtail hash, cheddar tater,
horseradish yogurt)
Baco Mercat (Los Angeles)
bacomercat.com



Beef Cheek Taco
(cotija, radish)
Tacolicious (San Francisco)
tacolicious.com



Takeaway: Foodie Is in the Details

- Swap-in Innovation
- My Way vs. Hi/Lo, Chef/Street
- Healthful/Indulgence (#WorthIt)
- Local to Global/Traditions & Fusions
- Sustainability



which characteristics?
(beyond which categories)



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questions?

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RESTAURANT SEGMENTS

Limited Service Restaurants (LSR)

Full Service Restaurants (FSR)

QSR

255,964 US units

counter service with no wait staff; focus on speed and food often served on disposables

Fast Casual (FC)

62,799 US units

counter service with focus on higher quality, fresh ingredients, and customization

Midscale (MDS)

117,590 US units

waiter service at a moderate price; often breakfast-focused, and generally no alcohol

Casual (CAS)

187,620 US units

waiter service at a higher price point than midscale, and often offering a full bar

Fine Dine

14,142 US units

high-end table service with chef-driven menu; most entrées priced \$25 or higher



Traditional Casual



Upper Casual



*unit counts include both chains and independents, Datassential Firefly 2016

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