

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Consumers are eating a variety of breakfast foods, at home and away, with their preference for healthy or indulgent foods differing by the day of the week. One constant however, is their need for quick, portable, and healthy breakfast foods that keep them full and energized."

- Amanda Topper, Associate Director - Foodservice

### This report looks at the following areas:

- Higher purchase of retail breakfast foods
- · Consumers are paying attention to product ingredient and labels
- Foodservice options viewed as more innovative

Consumers are open to eating breakfast foods across dayparts and for snacking, but there remains tough competition from foodservice offerings that rival retail products in flavor and format innovation.

This Report is the first of its kind from Mintel. Readers of this Report may also be interested in Breakfast Restaurant Trends – US, July 2016, Frozen Breakfast Foods – US, July 2016, Snack, Nutrition and Performance Bars – US, May 2016, Hot and Cold Cereal – US, August 2015, and Yogurt and Yogurt Drinks – US, August 2015. This Report explores a variety of issues related to breakfast including what consumers eat for breakfast and what motivates them to purchase breakfast foods, the importance of convenience and nutrition at breakfast, as well as various attitudes and behaviors related to the breakfast occasion.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### Table of Contents

#### Overview

What you need to know

Definition

#### **Executive Summary**

The issues

Higher purchase of retail breakfast foods

Figure 1: Breakfast food purchase, May 2016

Consumers are paying attention to product ingredient and labels

Figure 2: Behavior changes, May 2016

Foodservice options viewed as more innovative

Figure 3: Attitudes - Any agree, May 2016

The opportunities

Promote healthy foods beyond breakfast

Figure 4: Behaviors, May 2016

Be transparent about product ingredients, nutrition

Figure 5: Important nutrition claims, May 2016

Emphasize product nutrition, affordability

Figure 6: Attitudes - Any agree, May 2016

What it means

Market Factors

Growth of Millennials and Hispanics to impact category

Figure 7: Population, by generation share, 2016

Figure 8: Population by race and Hispanic origin, 2011-21

Market Perspective

Foodservice breakfasts create strong competition

Figure 9: Breakfast restaurant behavior changes, May 2016

Figure 10: Restaurant visitation for breakfast, by segment, May 2016

Key Trends - What You Need to Know

Portability is driving product innovation

Simple ingredients and functionality appeal to health-conscious consumers

Free-from for all

What's Working?

Breakfast anywhere, anytime

Figure 11: Introducing Quaker Breakfast Flats, March 2016

Simple nutrition and functionality



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Organic and GMO-free

Figure 12: Percentage of select breakfast foods with a GMO-free or organic claim, 2011-15

#### What's Next?

#### Cereal ditches milk

#### Alternatives becoming more mainstream

Figure 13: Percentage of select breakfast foods with select free-from claims, 2011-15

#### The Consumer - What You Need to Know

### Retail food purchases outweigh foodservice

Taste and nutrition both important

Breakfast foods also eaten outside of breakfast occasions

A need for restaurant-quality innovation

#### **Breakfast Food Purchase**

#### Retail foods more common at breakfast

Figure 14: Breakfast food purchase, May 2016

Figure 15: What is breakfast word cloud

Figure 16: The perfect breakfast

Figure 17: The perfect breakfast

### Men eating heartier breakfasts at home, and away

Figure 18: Breakfast food purchase, by gender, May 2016

### Millennials balance healthy and indulgent options

Figure 19: Breakfast food purchase, by generation, May 2016

### Restaurant quality items could appeal to Hispanics

Figure 20: Breakfast food purchase, by Hispanic origin, May 2016

### Factors Influencing Purchase

### Taste triumphs

Figure 21: Factors influencing purchase, May 2016

### Taste and nutrition more important to older generations

Figure 22: Factors influencing purchase, by generation, May 2016

### Nutrition a key driver for Hispanics

Figure 23: Factors influencing purchase, by Hispanic origin, May 2016

#### Purchase Location

### Supermarkets top retail purchase location

Figure 24: Purchase location, May 2016

### Parents diversify purchases across channels

Figure 25: Purchase location, by parental status, May 2016

### Millennials more likely to shop at mass merchandisers, natural channels

Figure 26: Purchase location, by Millennials and Non-Millennials, May 2016

Hispanics shop across channels based on need



APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 27: Purchase location, by Hispanic origin, May 2016

#### **Behavior Changes**

#### Nutrition, ingredients top-of-mind for consumers

Figure 28: Breakfast diary

Figure 29: Behavior changes, May 2016

#### Millennials more adventurous breakfast eaters

Figure 30: Behavior changes, by Millennials and Non-Millennials, May 2016

#### Important Nutrition Claims

#### Protein and simple ingredients most important

Figure 31: Important nutrition claims, May 2016

### Older generations interested in reduced claims

Figure 32: Select important nutrition claims, by generation, May 2016

#### Parents interested in added nutrition and free-from claims

Figure 33: Important nutrition claims, by parental status, May 2016

#### Opportunity to promote organic foods for Hispanics

Figure 34: Important nutrition claims, by Hispanic origin, May 2016

#### Weekday and Weekend Behaviors

### The weekend is a time for indulgence

Figure 35: Weekday and weekend behaviors, May 2016

Figure 36: Weekday breakfast foods

Figure 37: Weekend breakfast foods

#### Behaviors

### Breakfast foods are not only for breakfast

Figure 38: Behaviors, May 2016

### Parents more likely to value health and convenience

Figure 39: Behaviors, by parental status, May 2016

### On-the-go options can appeal to Millennials and compete with foodservice

Figure 40: Behaviors, by Millennials and Non-Millennials, May 2016

#### Attitudes

### Restaurant-quality foods in demand

Figure 41: Attitudes - Any agree, May 2016

### BFY restaurant-quality foods can appeal to 18-34s

Figure 42: Attitudes – Any agree, by age, May 2016

### Convenience, portability most important to Hispanics

Figure 43: Attitudes - Any agree, by Hispanic origin, May 2016

### Consumer Segmentation

Figure 44: Breakfast clusters



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Group one: Breakfast Skippers
Group two: Breakfast Health Nuts
Group three: Breakfast Lovers

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

Appendix – Consumer Segmentation

Cluster methodology

APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com