

## Breakfast Foods - China - May 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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



“Consumers are shifting to out-of-home breakfast venues, especially convenience stores, which offer convenience, value for money and a variety of choices. At the same time, consumers are sticking to Chinese foods at breakfast, and international players should consider adding Chinese ingredients or flavours into trendy Western breakfast foods to boost their appeal.”

**Summer Chen, Research Analyst**

This report looks at the following areas:

- **Fusing Western and Chinese breakfasts**
- **Daily specials worth exploring during breakfast**
- **Opportunity for vitamin claims when highlighting nutritional value**

### Covered in this Report

The report looks into Chinese consumers' breakfast habits and spending, both in and out of home.

#### In home:

includes everything people eat for breakfast at home – without the need to either go out of home or order food delivery. In-home breakfast occasions cover cooking from scratch, eating prepared meals, and packaged foods and beverages.

#### Out of home:

includes everything people buy out of home or from delivery. Out-of-home breakfast occasions cover buying from retailers (e.g. convenience stores, supermarkets etc), food service operators (e.g. fast food, coffee houses, bakery stores etc), independent food stores, kiosks, and food stalls. Spending on food delivery is also included.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto: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

# Breakfast Foods - China - May 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

Covered in this Report

Definitions

Figure 1: Definition of low/mid/high MHI groups, by city tier

### Executive Summary

The market

A market enjoying stable growth

Figure 2: Best- and worst-case forecast for breakfast foods, China, 2011-21

Out-of-home breakfast spending exceeds in-home in urban areas

Figure 3: Breakfast spending, in-home vs out-of-home, China, 2016

Key players

Breakfast cereal manufacturers increase focus on cold cereals and nut flavours

Convenience stores launch freshly-made coffee and soymilk

Fast food chains launch full meals and localised foods

Packaged breakfast foods improve their portability and satiety

The consumer

Breakfast at home is still most popular, while convenience stores are rising

Figure 4: Breakfast consumption frequency, February 2017

Figure 5: Breakfast consumption frequency, convenience stores, August 2013, April 2016, February 2017

Cleanliness and convenience are top requirements for breakfast venues, while nutrition is critical for breakfast foods

Figure 6: Factors of choosing breakfast, February, 2017

Consumers are sticking to Chinese breakfast foods

Figure 7: Most frequently eaten staple breakfast foods, February 2017

Granola has the potential to become the next star

Figure 8: Future trends of breakfast foods, February 2017

'High-in' claims are more important than low/no/reduced when highlighting nutritional value

Figure 9: Nutritional needs of breakfast, February 2017

What we think

### Issues and Insights

Fusing Western and Chinese breakfasts

The facts

The implications

Figure 10: Examples of fusion breakfast foods

Figure 11: Examples of Chinese breakfast foods going healthy and nutritional, 2016-17

Daily specials worth exploring during breakfast

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Breakfast Foods - China - May 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

The facts

The implications

Opportunity for vitamin claims when highlighting nutritional value

The facts

The implications

Figure 12: Example of breakfast foods stressing vitamin

Figure 13: Example of breakfast juice product, 2016

## The Market – What You Need to Know

A market enjoying stable growth

Shift to out-of-home venues and more nutritious breakfasts will drive growth

Out-of-home breakfast spending exceeds in-home in urban areas

## Market Size and Forecast

A market enjoying stable growth

Figure 14: Total spending on breakfast foods, China, 2011-16

Figure 15: Daily breakfast spending per capita, China, 2011-16

Figure 16: CPI of food, China, 2011-16

Growth momentum expected to continue

Figure 17: Best- and worst-case forecast for breakfast foods, China, 2011-21

## Market Drivers

Continuous urbanisation

Figure 18: Urbanisation, China, 2011-16

Shifting to out-of-home breakfast locales

Trading up to more nutritious breakfasts

## Market Segmentation

Urban population takes up 80% of breakfast spending

Figure 19: Breakfast spending, urban vs rural, China, 2016

Figure 20: Daily breakfast spending per capita, urban vs rural, China, 2016

Out-of-home breakfast spending exceeds in-home in urban areas

Figure 21: Breakfast spending, in-home vs out-of-home, China, 2016

Out-of-home breakfast spending expected to grow faster than in-home

Figure 22: Best- and worst-case forecast for out-of-home breakfast foods, China, 2011-21

Figure 23: Best- and worst-case forecast for in-home breakfast foods, China, 2011-21

## Key Players – What You Need to Know

Rise in new launches of cold cereals and bakery products for breakfast

“Microwavable” and “on-the-go” claims increase

Breakfast cereal manufacturers put more focus on nut flavours

Convenience stores launching freshly-made coffee and soymilk

Fast food chains launch full meals and localised foods

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Breakfast Foods - China - May 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

## Innovation highlights

### Competitive Strategies

#### Rise in launches of cold cereals and bakery products for breakfast

Figure 24: Share of new products launches mentioning "Breakfast", China, by subcategory, 2014-16

Figure 25: Examples of cold cereal products, 2016-17

Figure 26: Examples of breakfast cake products, 2016-17

#### "Microwavable" and "on-the-go" claims increase

Figure 27: Share of new products launches mentioning "Breakfast", China, by claim, 2014-16

#### Breakfast cereals

##### Rising fruit and nut flavours

Figure 28: Top 5 flavours of new product launches in breakfast cereal, by flavour subgroup, China, 2014-16

#### Product placement in popular TV series

Figure 29: Nutri-Brex's product placement in Ode to Joy (欢乐颂), 2016

#### Convenience stores launch freshly-made coffee and soy milk for breakfast

Figure 30: Freshly-made coffee and soymilk from convenience stores, 2016-17

#### Fast food chains

##### McDonald's launches breakfast item to appeal to regional palates

##### KFC introduces full breakfast meals

Figure 31: Western and Chinese full breakfast meal, KFC, 2017

##### Dim Sum restaurants offer packaged frozen foods at retail

##### Pharmaceutical company enters breakfast market stressing health benefits

Figure 32: Stomach-nourishing breakfast foods, Jiangzhong Pharmaceutical, 2016

### Who's Innovating?

#### Breakfast cereals evolve into more portable formats

Figure 33: Examples of more portable granola products, 2016

#### Yogurts embrace granola and cookies for satiety

Figure 34: Examples of yogurt becoming more filling, 2016-17

#### Family Mart offers customised value breakfast meal sets

Figure 35: Customised breakfast meal sets, Family Mart, Shanghai, 2017

#### Quaker Oats engages consumers through menu innovation

### The Consumer – What You Need to Know

#### Convenience stores are becoming popular breakfast venues

Cleanliness and convenience are top requirements of breakfast venues, while nutrition is critical for breakfast foods

#### Consumers stick to Chinese breakfasts

High-in claims are more important than low-in claims when highlighting nutritional value

### Breakfast Consumption Frequency

#### Breakfast at home is still the most popular

Figure 36: Breakfast consumption frequency, February 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Breakfast Foods - China - May 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

...but people are gradually shifting to out-of-home breakfasts

Figure 37: Breakfast consumption frequency, at home, August 2013, April 2016, February 2017

Convenience stores become popular out-of-home breakfast venues

Figure 38: Breakfast consumption frequency, convenience stores, August 2013, April 2016, February 2017

Figure 39: Examples of breakfast foods from convenience stores, Shanghai, 2017

Casual dining restaurants are preferred by young high earners

Figure 40: Breakfast consumption frequency, casual dining restaurants, February 2017

Figure 41: Weekend breakfast menu, Pizza Hut, China, 2017

## Factors for Choosing Breakfast

Cleanliness and convenience are decisive when choosing breakfast venues

Figure 42: Factors of choosing breakfast, February, 2017

Value for money is also important

Figure 43: KFC Breakfast foods value for money campaign, China, February 2017

Nutrition and freshness worth highlighting

Figure 44: Factors for choosing breakfast, by age, February, 2017

Figure 45: Factors for choosing breakfast, cross analysis, February, 2017

Men prefer convenience while women value variety

Figure 46: Selected factors for choosing breakfast foods, by gender, February 2017

## Most Frequently Eaten Staple Breakfast Foods

Consumers stick to Chinese breakfasts

Figure 47: Most frequently eaten staple breakfast foods, February 2017

Figure 48: Most frequently eaten staple breakfast foods, word cloud, February 2017

Different preferences across regions

Figure 49: Selected most frequently eaten staple breakfast foods, by region, February 2017

Congee is less popular as breakfast on-the-go

Figure 50: Selected most frequently eaten staple breakfast foods, cross analysis, February 2017

## Future Trends of Breakfast Foods

Yogurt and lactobacillus drinks are most popular

Figure 51: Future trends of breakfast foods, February 2017

Figure 52: Future breakfast foods trends, acceptance rate, February 2017

Coffee is preferred by mature consumers with high incomes

Figure 53: Future trends of breakfast foods, coffee, February 2017

Granola and breakfast biscuits enjoy high penetration and potential

Figure 54: Examples of innovative granola and breakfast biscuit products, 2016-17

Figure 55: Future trends of breakfast foods, coffee, February 2017

Energy foods can target female consumers

Figure 56: Innovation of energy foods, 2017

Figure 57: Future trends of breakfast foods, energy foods, February 2017

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Breakfast Foods - China - May 2017

Report Price: £3081.32 | \$3990.00 | €3661.84

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

## Nutritional Needs of Breakfast

More attention to "high" than "low" claims

Figure 58: Nutritional needs of breakfast, February 2017

Figure 59: Quaker Oats, China, 2014-17

Sophisticated consumers value protein

Figure 60: Nutritional needs of breakfast, protein, February 2017

Different genders and age groups value different traits

Figure 61: Nutritional needs of breakfast, by age, February 2017

Figure 62: Nutritional needs of breakfast, by gender, February 2017

## General Behaviours/Habits of Breakfast

More than a third of consumers buy breakfast from the same place

Figure 63: General behaviours/habits of breakfast, variety, February 2017

Half of consumers believe they eat nutritious breakfasts

Figure 64: Selected general behaviours/habits of breakfast, cross analysis, February 2017

## Meet the Mintropolitans

MinTs value nutrition, fresh ingredients and variety

Figure 65: Factors for choosing breakfast, by consumer classification, February, 2017

More interested in breakfast delivery service

Figure 66: General behaviours/habits of breakfast, by consumer classification, February 2017

## Appendix – Market Size and Forecast

Figure 67: Total spending on breakfast foods, China, 2011-21

## Appendix – Market Segmentation

Figure 68: Total spending on breakfast foods, by segment, China, 2011-21

## Appendix – Methodology and Abbreviations

Methodology

Figure 69: Map of surveyed cities

Fan chart forecast

Abbreviations

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)