



BREAKFAST

2018 • CATEGORY INSIGHT REPORT

The breakfast landscape is changing as consumers respond to the busy pace of modern life and evolving attitudes toward healthy eating. Breakfast remains a key component to everyday life, and the space is increasingly dynamic and exciting. Consumers' attitudes toward breakfast are moving towards a health focus. At the same time we are tracking trends like all-day breakfast, breakfast beverages, overnight oats and stand-out toast.

A HEALTHY START

Breakfast is touted as the most important meal of the day yet 1 in 4 consumers say it takes them less than 5 minutes to prepare and consume it. There are clear areas of growth and opportunity worthy of product developers' attention. Consumers are increasingly on-the-go, meaning convenience is a key product attribute to keep in mind. Health is also top of mind for consumers and that is made very clear in research from DSM Food Specialties. Their findings show that when it comes to breakfast foods in particular, consumers are driven by health overwhelmingly over other attributes. Consumers are starting their day in entirely new ways, and health is a key factor.



WHAT DO CONSUMERS VALUE MOST IN BREAKFAST?

- 76% prefer quality over quantity
- 69% prefer healthy over cheap foods
- 65% prefer healthy over tasty
- 65% prefer healthy over indulgence

Source: DSM Food Specialties

According to a recent Food Network Poll, fans voted on their favorite breakfast meat. Who came out on top?



OF CONSUMERS
PREFER BACON



OF CONSUMERS
PREFER SAUSAGE

BREAKFAST ANYTIME

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21%

INCREASE IN BREAKFAST
ITEMS ON ALL DAY MENUS
FROM Q4 2015-2017

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Breakfast sandwiches are the top menu item on all day breakfast menus and showing 37% growth from Q4 2015-2017.



MENU MENTIONS:

- **Meat Lover's Breakfast Flatbread** which is topped with sausage gravy, strips of bacon, ham cheese and a whole fried egg at Corning in New York City.
- **All Day Brunch Burger** which is served with bacon and onion and topped with a fried egg, crispy hash browns, American cheese and ketchup and is available at Applebee's nationwide.
- **Kentucky Breakfast Stout** is an imperial stout brewed with massive amounts of coffee & chocolate, then cave-aged in oak barrels under the city of Grand Rapids, MI. KBS ages for an entire year to add bourbon undertones to the beer. Available for a limited time only.

Breakfast for dinner has always been a treat in many homes and is absolutely the trend on the menu as well. According to Technomic, all day breakfast menus remain popular. About 30% of consumers say that they are purchasing breakfast fare beyond the morning hours, and more often than they were just two years ago.



Source: Mintel Menu Insights

MORNING BEVERAGES PACKING A PUNCH

Consumers are looking for functional ingredients, especially in health-forward beverages like smoothies and juices. Some examples of these functional ingredients include turmeric and matcha. Use of turmeric and matcha have both grown significantly from Q4 2015-17, according to Mintel Menu Insights. There has also been growth of these ingredients in retail products. Consumers want to start their day with healthy intentions, whether that's in the form of a juice, latte, or smoothie.



MENU MENTIONS:

- **Poolside Fit Smoothie** is a blend of fresh cucumber, watermelon, strawberry, and peach that is pre-boosted with collagen for glowing skin and healthy joints at Jamba Juice.
- **Charcoal Latte** made with activated charcoal and is said to be “the perfect detoxifier and stress reliver for the body,” according to Werewolf Coffee in Chicago. The coffee bar also features a Paper Moon Latte for the solar eclipse featuring turmeric and charcoal together.
- **Wild Child Smoothie** is made with fresh pineapple juice, banana, mango, dragon fruit, lime, pea protein, maca, and coconut oil at Texas-based JuiceLand.

57%

OF CONSUMERS LIKE WHEN HEALTHY BEVERAGES PROVIDE A FUNCTIONAL BENEFIT

51%

OF CONSUMERS ARE MORE WILLING TO TRY UNFAMILIAR INGREDIENTS IF IT OFFERS A HEALTH BENEFIT

OVERNIGHT OATS

Convenience, health, satiety, customization — overnight oats check all the boxes. That’s why the internet is full of overnight ideas. On Pinterest, you’ll find sweet recipe ideas like Banana Cream Pie, Blueberry Maple, Chocolate Cake Batter and Raspberry Vanilla Chia. Savory flavor inspiration was found in an article in *Cooking Light* that said overnight oats were healthy, comforting and vastly undervalued.

In retail, Quaker launched Overnight Oats featuring quinoa and flaxseed. It’s available in 4 flavors: Blueberry Banana & Vanilla (an IRIS top seller), Orchard Peach Pecan, Toasted Coconut & Almond, Raisin Walnut & Honey. The product is positioned as providing a “hassle-free morning” and product directions are to simply “Steep. Sleep. Eat.”

Whether positioning your existing product, such as an ancient grain muesli, as perfect for make-at-home overnight oats, or launching your own product to make the process even easier for consumers, this is an area where oats can see growth.

CHIA SEEDS

Chia’s growing presence in hot and cold breakfast cereals is also seen in overnight oats. It’s a common ingredient in the overnight creations for its nutritional punch and the jelly-like consistency it takes on when soaked in liquid.

The flavor pairings with Chia are endless including: chocolate peanut butter, brown sugar banana, chai spice, strawberry vanilla, and even carrot cake.

PRO & CON:

REAL CONSUMERS ON OVERNIGHT OATS

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I like the convenience of the product; I would prep this night before (which wouldn’t even be that much work) and have it ready to eat in the morning. And it looks moderately healthy and tasty.

-Female, South, 18-34

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Soaking overnight just would never happen with me. I simply would not remember or it would become just another item on an unending list of things I have to do before I go to bed. No, thank you!

- Female, Northeast, 55+

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Source: Mintel

THIS TREND IS TOAST

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52%

INCREASE IN TOAST
MENU ITEMS FROM
Q4 2015-Q4 2017

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Casual dining is the top restaurant segment featuring toast as a menu item. Smoked is the top flavor of the menu items showing 257% growth from Q4 2015-Q4 2017.



MENU MENTIONS:

- **Broccoli Toast** with a slab of bread slathered with house made labneh, giant chunks or roasted broccoli, citrus and scattered pumpkin seeds at Kismet in Los Angeles, CA.
- **Smashed Pea & Coconut Yogurt Toast** has creamy coconut yogurt with a blend of peas, mint and lemon seasoned with salt and pepper chili flakes on toasted Balthazar bread at Bluestone Lane Coffee in New York, La Brea & Studio City, CA.
- **Smoked Shiitake & Kale Toast** with miso crème Miso creme fraiche, fried egg, sourdough. Served with arugula salad tossed in a yuzu vinaigrette at The Peach Tortilla in Austin, TX.

MOVE OVER, AVOCADO TOAST!

While the avocado toast trend might be dying (according to the *Wall Street Journal*), there has been growth in use of other toppings on a variety of toasted breads. Operators are using house made breads (sourdough, multigrain, brioche, etc.) and smothering them with yogurt spreads, cured fish, cheese, purees (think sweet potatoes), and seasonal vegetables and herbs. The options are truly endless which also means operators can incorporate a variety of cuisine types into the dish (e.g. Turkish, Italian).



Source: Mintel Menu Insights

Breakfast Takeaways

Health and Convenience are the key concepts in today's breakfast space. Whether it's all day breakfast options, beverages that offer new and trending ingredients, one stop overnight oats or the multitude of new ways to enjoy toast—one thing to keep in mind is that consumers prefer health over other key attributes such as price, taste and indulgence. How can you make it healthy and easy for your consumer to get the "most important meal of the day?"

YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

From concept to manufacturing, we're here for you — every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at www.fona.com/contact-fona/



Need more?

Reach out to Pamela, your consumer trend expert!

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SOURCES

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