

A top-down view of a breakfast table. In the center, a white bowl of cereal with milk is being eaten with a spoon. To the left, a hand holds a yellow cup. To the right, a hand holds a green cup. In the foreground, there are several colorful macarons on a white plate with a floral pattern. To the right, there are two halves of an orange on a wooden cutting board. In the background, there are more plates of food, including what looks like a croissant and some bread. The overall scene is a busy, social breakfast gathering.

BREAKFAST

5 TRENDS TO TRANSLATE INTO THE GROCERY AISLE

Known as the most important meal of the day, an indulgent treat, or an excuse to gather with family and friends, breakfast truly is a jack of all trades. Showing 91% positivity from consumers, the love is nearly universal. While indulgent breakfast foods are showing up in dayparts other than morning time, the influence of the wellness movement is making itself known in protein content and nutritious smoothies. Coffee continues to be the first stop for breakfast innovation, with subscription services, unique creamers and blasts of butter. All that and so much more — let's see what's happening in the world of breakfast.

BREAKFAST ALL DAY, EVERY DAY

Chicken and waffles, steak and eggs, breakfast pizza – you name it! Nearly four years after McDonald’s introduced all-day breakfast nationwide, breakfast inspired dishes and product positioning are continuing to expand to midday and late-night dishes. According to Mintel 84% of American adults reported eating at least one out-of-home brunch in the past three months. Similarly, a “breakfast for dinner” search on social media showed 92% positivity in social posts.

THE BUZZ AROUND BREAKFAST ALL DAY

For many consumers, traditional breakfast food can feel too heavy or indulgent, leaving them feeling unenergized at the start of their day. Breakfast offerings later in the day may meet a consumer’s craving for indulgent foods without the sluggishness. In addition, breakfast-inspired meals may be better suited for later in the day as many consumers lack time to eat a full meal in the morning.

Regarding a social aspect, breakfast for lunch, dinner, or dessert provides a fun alternative for consumers and can also be used as a way to spend time with family and friends. We have noted a few dining examples that have put a unique twist on breakfast dishes.



BURGERS TO CRAVE

Awarded for their “crazy chef inspired burgers”, Crave Burger in Colorado includes a breakfast burger on their menu called the Luther which features bacon, cheddar, egg, onion, and most importantly, 2 glazed donuts as the bun.

WAFFLE MANIA

If you’re into sweets, breakfast for dessert might be the dish for you. Clinton Hall restaurant in New York features “Waffle Mania,” a selection of wild waffle desserts. One offer features three red velvet waffles stacked with layers of vanilla ice cream in between and is topped with a slice of red velvet cake and Oreos – talk about curing your sweet tooth.

Breakfast food doesn’t have to mean waking up bright and early to eat it. The newfound love of breakfast at any time of day provides an opportunity for product developers to utilize breakfast inspired flavors in a wider range of products and dining experiences from breakfast and brunch to dinner and dessert.

PROMOTING PROTEIN

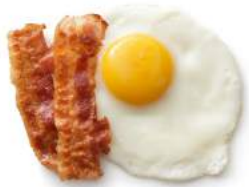
Protein is a powerhouse performer in food and beverage. Food Business News calls it “the nutrient that sells,” with 4 out of 5 consumers rating protein content as an important factor for purchase. It’s no surprise that protein is shaking up the breakfast space. In fact, 22% of US consumers say protein is a top attribute when choosing frozen breakfast food.

When we think breakfast, indulgent foods such as pancakes, donuts, and French toast often come to mind. The downfall is that these foods include empty calories and lack nutrients, therefore providing low nutritional value for consumers. With health-conscious consumers on the rise, there is opportunity in promoting healthier options by highlighting high-protein content. Balancing a consumer’s desire for health-conscious products and indulgent flavors can be a tricky yet fruitful task for product developers.

From waffles to cereal, breakfast product introductions featuring high protein content entice consumers due to their greater nutritional offerings. Overall, finding balance between flavor and consumer benefit is key.



PROMOTING PROTEIN, continued



AN EGG-CELENT SOURCE OF PROTEIN

According to Mintel, 93% of consumers say they eat eggs. Providing around 6 grams of protein per egg, not only are eggs a healthy addition, but they are versatile and easy to include in many dishes such as breakfast skillet, casseroles, omelets, and more. In addition, egg is a top growing flavor in breakfast product introductions with 200% growth in the past 3 years.

The opportunity for product developers is to enable consumers' egg consumption. On-the-go products like Ore-Ida's "Just Crack an Egg" protein scramble does just that. Consumers showed positive feedback for this specific product with **57% responding that they would possibly buy the product, significantly outperforming its subcategory**. Egg-friendly sauces such as flavored hot sauces and ketchups may also be a way to delve further into this market.



OFF THE GRID

Following disruptors in the protein waffle and pancake category such as Kodiak Pancakes, Kellogg's has introduced their Off the Grid protein waffles to cater to the health-conscious and on-the-go consumer. Providing 12 grams of protein and nine essential amino acids, Off the Grid protein waffles offer a familiar sweet breakfast treat with added nutrients.

Consumer perception: 44% of consumers polled said they would possibly buy this product, outperforming its subcategory.



MAGIC CEREAL

In today's market, subscription services can be for just about anything, even cereal. Magic Spoon Cereal offers fruity, cinnamon, frosted, and cocoa flavors that are sold online for one-time purchase or subscription. Each is keto friendly containing 12g protein and 3g net carbohydrates per serving. Though pricier than the average cereal, retailing at \$10 per box, Magic Spoon aims to hit the mark for health-conscious consumers who also love classic breakfast flavors.

NUTRIENT-DENSE SMOOTHIES



“While sugary juice drinks suffer from an unhealthy image, smoothies are very much on trend. Outweighing their intrinsic sugar content by shifting the focus to nutrient density, satiety and functional benefits, smoothies are well positioned to tick the modern foodie’s nutritional boxes.” Mintel



Smoothies, often loaded with sugars are undergoing a transition to now star greens, healthy fats, and other good-for-you ingredients in breakfast product introductions. **In one year alone, breakfast products saw a 100% increase in functional claims (2018-2019).** Smoothies are often the answer for those consumers craving sweet tartness with additional health benefits.

For example, healthier fats like avocado or oils such as coconut, walnut, or rapeseed oil have been rising in popularity. Some claim these ingredients may help reduce risk of heart disease and improve blood cholesterol. Similarly, hemp seeds and chia seeds have found their way into many smoothie recipes in dining and product introductions providing protein and fiber to the mix. Vegetables such as spinach, carrots, and celery are also common ingredients and add vitamins and minerals.

NUTRIENT-DENSE SMOOTHIES, continued

According to Mintel, 52% of consumers in 2019 have purchased made-to-order smoothies in the past six months. In retail, there have been 3,149 global smoothie product introductions in the past three years. Let's take a look at a few notable products.



SmooFit's Regeneration Smoothie is said to be a 100% natural product containing avocado oil, beetroot blueberry, apple and coconut oil. The product is gluten free and made with fresh fruits and vegetables.



Bioglan Probiotic Apple & Cinnamon Breakfast Smoothie contains 5 billion probiotics, oats and chia. It's 98% sugar free.

- 32% of consumers polled said they would possibly purchase, significantly outperforming against subcategory.



TruVibe's Eat Clean Superfood Meal is a vegan, gluten and GMO-free product containing avocado, spinach and hemp seeds. The blend provides essential fats, 15g plant protein, probiotics, and antioxidants.

- The people asked perceive this product as being healthy and convenient, but only 15% said they would possibly purchase – significantly underperforming against subcategory.

BREAKFAST...BUT BOOZY

Boozy bottomless brunches have gained popularity as a fun way to gather with friends and family and enjoy breakfast and morning cocktails. For a flat rate, most bottomless brunches serve unlimited cocktails or breakfast dishes. With 40% of US consumers responding that they eat brunch at restaurants to socialize with friends and family, product developers can find great opportunity in offering unique breakfast inspired dishes and drinks. Combining breakfast flavors in alcohol or alcohol in breakfast dishes can help open a new market for breakfast inspired products.



BARRIO

For a \$25 flat rate, at Barrio restaurant in Chicago customers can enjoy bottomless blood orange mimosas, bloody marys, and bloody marias from 10am to 3pm on Sundays. Although food is not included, Barrio's menu offers a variety of brunch dishes from churro French toast to eggs benedict and chilaquiles.

MIMOSA WINE COCKTAIL

Braman Winery offers a Mimosa Wine Cocktail that is described as a grape wine with orange juice that is perfect for brunches, parties, showers, or a warm afternoon. When asked about their initial reaction, consumers perceive this product as being a **convenient and indulgent treat** with **38%** of consumers responding that they would try this product.



WHAT' S BREAKFAST WITHOUT A CUP OF JOE?

Whether for a morning pick me up with breakfast or to help relieve a mid-day crash, coffee is often the go-to option for consumers, as well as a field of opportunity for product developers. From coffee subscription services to bulletproof coffee and unique coffee creamers, innovation (like the day itself) often starts with coffee.

FOR COFFEE CONVENIENCE OR THE COFFEE CONNOISSEUR

In fast food, Burger King launched a coffee subscription service to compete with Starbucks and other fast food chains. For \$5 per month, Burger King offers a small coffee per day to subscription members. The convenience and low cost may attract consumers who purchase coffee daily.

For those who are more adventurous with their coffee, subscription boxes offer a new way to branch out and try coffee brands from around the world. Online subscription service, Atlas Coffee Club sends coffee samples from countries around the globe with flavor notes, brewing guides, and a postcard from the country the coffee was made in.



WHAT'S BREAKFAST WITHOUT A CUP OF JOE?, continued



BULLETPROOF AND BUTTER

Adding ingredients like butter, MCT oils and ghee into coffee drinks is said to increase brain health, satiety and energy without added sugar. While Bulletproof might have kicked interest off, RTD offerings from brands like It'sMyCoffee and fat bombs (to be added to coffee) from brands like Ladybird are launching at a steady pace. From ready-to-drink to made-to-order products, the trend has provided lots of opportunity for innovation in the market.

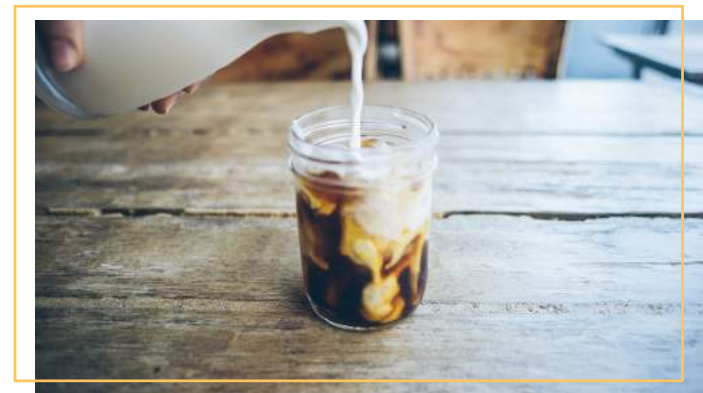
COFFEE CREAMERS MEET CONSUMER PREFERENCE

In the coffee segment, there is opportunity in functional, plant-based and unique coffee creamers. Innovation in coffee creamer flavor and format is nothing new. The latest innovation comes from popular product introductions in the functional space. Featured claims include energy, added protein, antioxidants, and brain and nervous system benefits.

For example, Bulletproof Coffee's Vanilla Latte Cold Brew is made with collagen powder and provides 15g protein per serving. Other introductions have focused on improving digestive wellness and satiety.

Similar flavor innovation comes from plant-based options or out there flavors that meet a wide consumer preference. From Silk's Soy Vanilla Creamer to Better Half's Almond and Coconut Creamer, plant-based creamers are increasingly appearing on the shelf.

Unique flavors such as Nestle Coffee-Mate's Strawberry Cheesecake Creamer, Delight's Cinnabon Cinnamon Roll Creamer, and even Baileys Irish Cream Coffee Creamer round out innovation in recent launches.





THE TAKEAWAYS

The lines for breakfast have blurred. This disruption in the status quo means opportunity for product developers ready to capitalize. Consumer trends show popularity in breakfast inspired dishes and products as alternatives for classic brunch, lunch, dinner, and even dessert meals. More dayparts and occasions for breakfast food means even more opportunity for product developers. The possibilities are seemingly endless in this space, from health-conscious and indulgent foods, to alcohol and coffee beverages. Transitioning from dedicated first meal of the day to boozy bottomless brunches, on-the-go snacks, and breakfast for dinner, consumer mindset on breakfast has changed. Is your product development ready to change with the times?

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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.

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