Morning Occasions Represent a Large Opportunity for Food and Beverage Marketers

Importance of Morning

153 Billion morning occasions a year that include at least one food and/or beverage

Over $200 Billion spent on this occasion annually

And 1 in 7 people skip Breakfast

Source: The NPD Group/Morning MealScape 2011
In-Home Dominates Breakfast, but Away-from-Home is Growing

- Home: 75%
- Away from home: 11%
- Both Home and Away: 14%

Source: NPD Morning MealScape 2011 Study
Away-from-home Breakfast Data

• Breakfast spending among those under 25 years old skyrocketed by more than 50% during 2007-2011.

• The percentage of breakfast restaurant users increased during 2008-2011 reaching 32%.

Not all Morning Occasions are Equal

Source: The NPD Group/Morning MealScape 2011
Breakfast tends to be Routine and Convenience Based

When Did You Decide What to Eat?

73% Didn’t give it any thought

Time Spent in Minutes at Each Meal Component

- Morning Meal: 16.6 min
- Lunch: 33.8 min
- Dinner: 46.0 min

* Home-sourced foods where preparation was required; eat time are for all items consumed at home or away

Sources: The NPD Group/Morning MealScape 2011, Lunchtime MealScape 2007, Dinnertime MealScape 2009

Source: The NPD Group's CREST® and National Eating Trends® Services
Breakfast tends to be Lacking in Protein

Source: What We Eat in America NHANES, 2007-2008; individuals 2 years and over.
Purchasing of Selected Types of Grocery w/Targeted H&W Positioning, 2011 (% US shoppers)

- Oatmeal/hot cereal
- Yogurt/yogurt drinks
- Fresh fruit/vegetables
- Soy beverages
- Meal replacement drinks
- Juice/juice drinks
- Snack/cereal/nutrition bars
- Fortified/enhanced bevs
- Tea/ready-to-drink tea
- Crackers/chips/savory snacks
- Coffee/ready-to-drink coffee

Read as follows: 64% of shoppers regularly buy oatmeal/hot cereal. Of these, 57% buy it at least partly due to nutritional advantages related to health concern; and 51% regularly buy brands marketed as targeting specific health concerns.

Note: Based on product purchasing within past 12 months.
Source: Packaged Facts Sept 2011 Food Shopper Insights Survey
Cafe Yogurt Frappe Prototype

- Beverages (mainly coffee) represent 75% of the top foods and beverages consumed for a wake-up routine.\(^1\)
- Spending on yogurt is increasing worldwide—annual spent per capita was $21 in the U.S. and $41 in Europe. Asia-Pacific experienced an almost 25% increase in 2012.\(^2\)
- Contains yogurt, whey protein concentrate 80%.
- Has a unique sweetening system of hydrolyzed lactose and Stevia.

2. Yogurt Category Review 2013 Source: Datamonitor Database 2012
Mooofins are a dairy-based, quiche-like muffin created for health-conscious adults seeking a high-protein breakfast item to complement their busy lifestyle.

DayBreakers are a milk protein based breakfast option similar to French toast sticks that has an airy, bread-like texture lightly seasoned with cinnamon and packed with maple syrup.

Whey-Go is a microwavable, easy-to-eat product made of a hearty egg, bacon and cheese scramble inside a crispy whey protein waffle crust.
Thank you!

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