



DSM Breakfast Report Part One: What we're eating to start the day

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Breakfast is considered the most important meal of the day, and for good reason. Eating a healthy breakfast has been positively correlated with maintaining a healthy weight, avoiding heart disease, and preventing type 2 diabetes in addition to providing more immediate benefits, like enhancing concentration and memory at work or school.

However, breakfast is also a meal under pressure. Busy households have less time for breakfast than ever, and want this meal to be as healthy as possible while remaining both convenient and affordable.

DSM, as a supplier of food ingredients that contribute to greater health and wellness for people around the world, has conducted a survey in October 2017 with 3,500 consumers in Germany, the Netherlands, Spain, Sweden, France, the United Kingdom, and the United States. In this survey, we investigated the ways that consumers eat breakfast and where the opportunities lie for product innovation.

In part one of our breakfast report, we focus on the four major themes we found to be shaping the breakfast meal for western consumers.

- 1. Time crunch:** We learned that consumers have less time to eat breakfast, but still want to eat something in the morning, meaning convenience reigns supreme.
- 2. Healthy eating:** A growing number of people are looking out for their health, which means making healthier choices in the supermarket.
- 3. Clean-label:** Consumers are keeping an eye out for more natural, clean-label options as a mark of quality and health.
- 4. Indulgence:** Consumers switch gears on the weekend, when breakfast becomes a special occasion to connect with their loved ones, and a bit of indulgence is allowed.

Insight #1

We have less time to eat (but we want to eat something)

With commuting times on the rise, it is no wonder that consumers feel pressed for time in the morning, and that breakfast needs to be fast.

Half of consumers in our survey say they spend less than 15 minutes a day on their breakfast during the week, and 1 in 4 people spend less than 5 minutes on the meal. Nearly 1 in 5 consumers agree or completely agree that they spend less time preparing and eating breakfast than they did 5 years ago. This makes convenience extremely important; a strong majority of respondents to our survey (78%) confirmed that breakfast should be convenient to prepare and eat.

The number of people skipping breakfast is small

Even though consumers have less time for breakfast, the number of breakfast skippers remains rather small. A full 85% of people responding to our survey say they eat something for breakfast every day. This number is lowest in the UK, where only 78% of people eat breakfast every day, and highest in Spain where 94% of people eat breakfast every day. Of the people who skip breakfast, 39% do so because they simply don't have the time.

Jaap van den Berg, DSM Marketing Manager Fine Baking

"Snacking in general is on the rise, with many consumers seeking out single-portion products and small meals to fit a hectic schedule. As more people reach for a snack instead of a meal at breakfast, it becomes more important for those snacks to offer healthier options, for example, containing added nutrition or reducing any unwanted elements, such as acrylamide."



Percentage of consumers spending less than 5 minutes per weekday on breakfast

Germany	Netherlands	Spain	Sweden	France	UK	USA	Average
37%	32%	24%	16%	26%	37%	34%	26%

Insight #2

Quality and health drive value in the morning

Public awareness about eating habits and their impact on long-term health is steadily on the rise, and nowhere is this link between health and food felt more strongly than at breakfast, the meal that sets the tone for the day.

In our survey, a huge 76% of respondents say they are conscious about their health. Respondents also say they value the quality and healthfulness of the foods they eat much more than their price.

Sugar anxiety stands out at breakfast

Of the health concerns people have, sugar anxiety stands out at breakfast. A large majority (58%) of respondents say they are paying attention to the amount of sugar in their breakfast products. In comparison, just 19% of consumers say they pay more attention to calories at breakfast than at lunch or dinner.

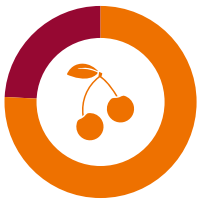
One in ten people responding to our survey are following a completely sugar-free diet, but a much larger percentage (45%) of consumers agree or completely agree that they are looking for less-sweet options than they were just three years ago. This trend toward less-sweet foods is strongest in the US (52% agree or completely agree) and Spain (56%).

Mark Fahlin,
Global Marketing and
Business Line Manager
FMP Dairy Cultures and Probiotics

"The popularity of yogurt only continues to grow as more people become aware about digestive health and the role that fermented products can play. Dairy producers can leverage this trend by creating yogurts that are easier to digest and lower in sugar, or introduce new fermented products such a kefir that are also gaining in popularity for their health benefits and unique, authentic taste."



What consumers value most in the breakfast products they eat



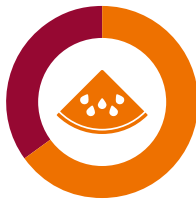
76%
prefer quality
over quantity



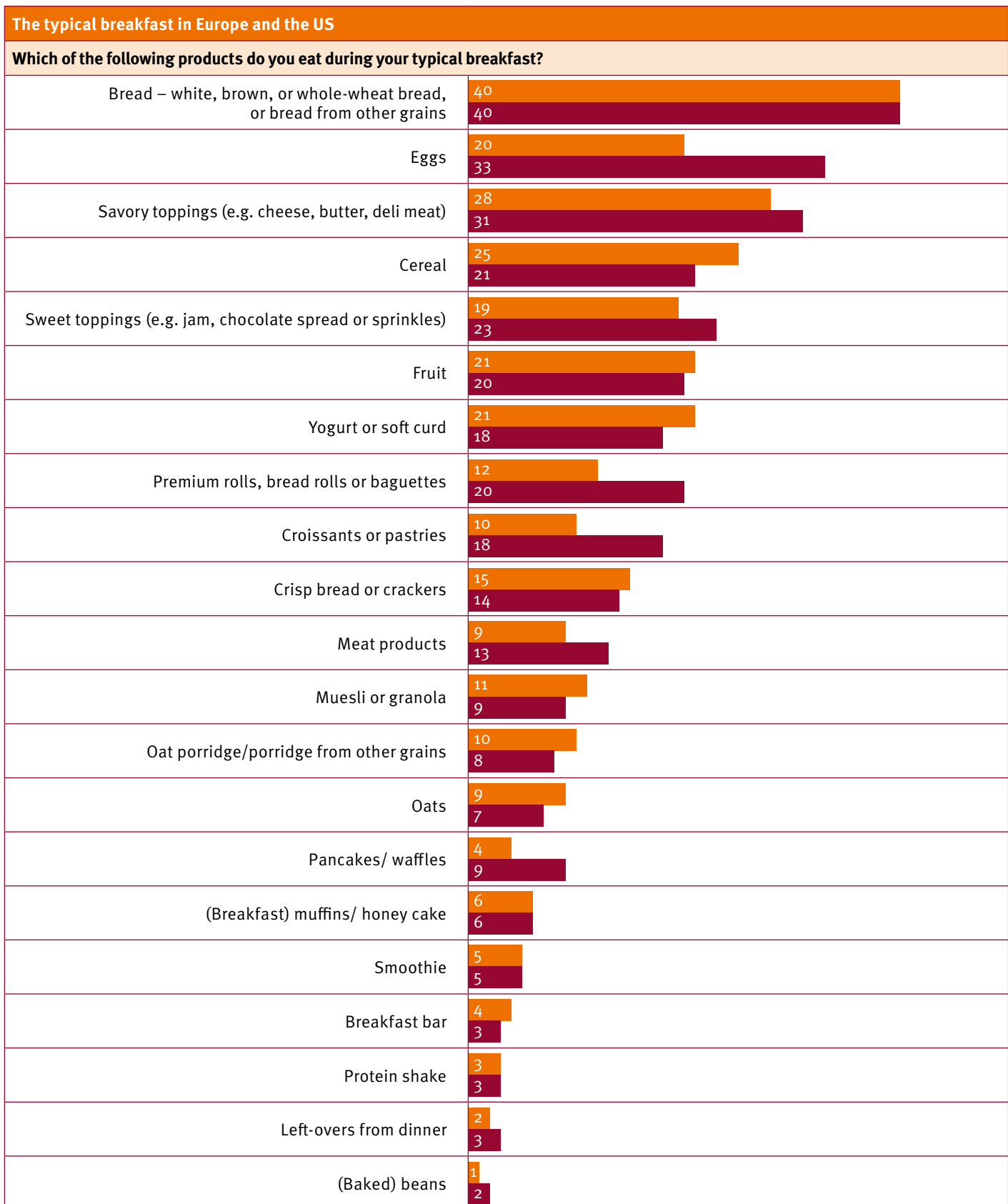
69%
prefer healthy
over cheap foods



65%
prefer healthy
over tasty



65%
prefer healthy
over indulgence



week weekend

Insight #3

Healthy choices associated with cleaner labels

The trend toward clean and clear labels continues to grow, based primarily on the reasoning: *If I can recognize the ingredients in my food, they are more likely to be healthy for me.*

To support the goals of healthy eating in the morning, 59% of respondents say they read food labels more often than they did five years ago, and 56% look first to the ingredients list. More than half of respondents (54%) are looking for natural solutions when buying breakfast products. Artificial colors have clearly fallen out of favor with 49% of respondents saying they actively avoid these at breakfast.

While additives are sometimes seen in a negative light, with 43% of consumers saying they think food additives are bad for their health, consumers are still open to ingredients that make their food healthier; around 39% of consumers say they would be interested in positive additives in breakfast products, such as added vitamins or minerals.

Frank Meijer,
Product Application Expert Savory
Ingredients

"It's all about choice. Some consumers are looking for healthier products that also have a cleaner, clearer label, but they don't want to compromise on taste. With these consumers in mind, we have launched a new solution that ticks all the boxes. ModuMax™ is our taste modulator that improves the taste of low-sugar, -salt, and -fat applications while being labelled as a natural flavor in the US and the EU, and that is non-allergenic."



Insight #4

We like to indulge and enjoy on the weekend

The picture of breakfast changes on the weekend, when consumers are more apt to take their time and make room for some more indulgent, delicious food products.

Many consumers (56%) in our survey eat breakfast alone during the week, but on the weekend, just 36% eat alone, and more people spend this time with their partners and children. Consumers take more time for breakfast as well, with the number of people eating breakfast in less than 5 minutes dropping to 14%.

Some 18% of respondents say they eat breakfast in the weekend just because it's enjoyable (this is just 14% for the weekdays), and not strictly just to provide energy for the day. This is also the time when people will indulge in more luxurious food items, and we see a spike in the consumption of eggs (from 20% to 33% of people eating this food on the weekend), croissants and pastries (from 10% to 18%), premium bread rolls and baguettes (from 12% to 20%), fresh fruit juice (12% to 17%), and pancakes or waffles (from 4% to 9%).

Joana Carneiro,
Business Line Manager Beverage
Enzymes

"Increasingly, consumers are reaching for high-quality organic fruit juices, and juices that are rich in both color and antioxidants for an extra health kick. Fruit juice manufacturers can cater to this demand while increasing their yield and production efficiency with help from fruit juice enzymes that also happen to fit with organic and non-GMO labelling requirements in many countries."



In summary

Health, convenience, and taste: These are the three trends shaping consumer choices at breakfast. The first meal of the day is associated with making smart, healthy choices but also needs to be fast and filling to meet the needs of today's increasingly time-pressured consumers. With these insights, food producers have an opportunity to deliver on the growing appetite for healthy, convenient, and great-tasting breakfast products to the benefit of consumers around the globe.

"I think I'm a seven-and-a-half [out of ten for healthy eating] because sometimes I like bad food, but I also like strawberries and blueberries," Sophie, age 11.

"I think [I'm a] seven because sometimes I do eat healthy, and other times I don't, but I make sure that I'm active a lot," Stephen, age 13.



Growing kids need a healthy meal to start the day. We asked the DFS Kids Panel what they like to eat in the morning – and what they think is healthy food. Find out what we learned in our video at dsm.com/food/



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