



U.S. Dairy
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Morning Matters

IFT 2013

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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

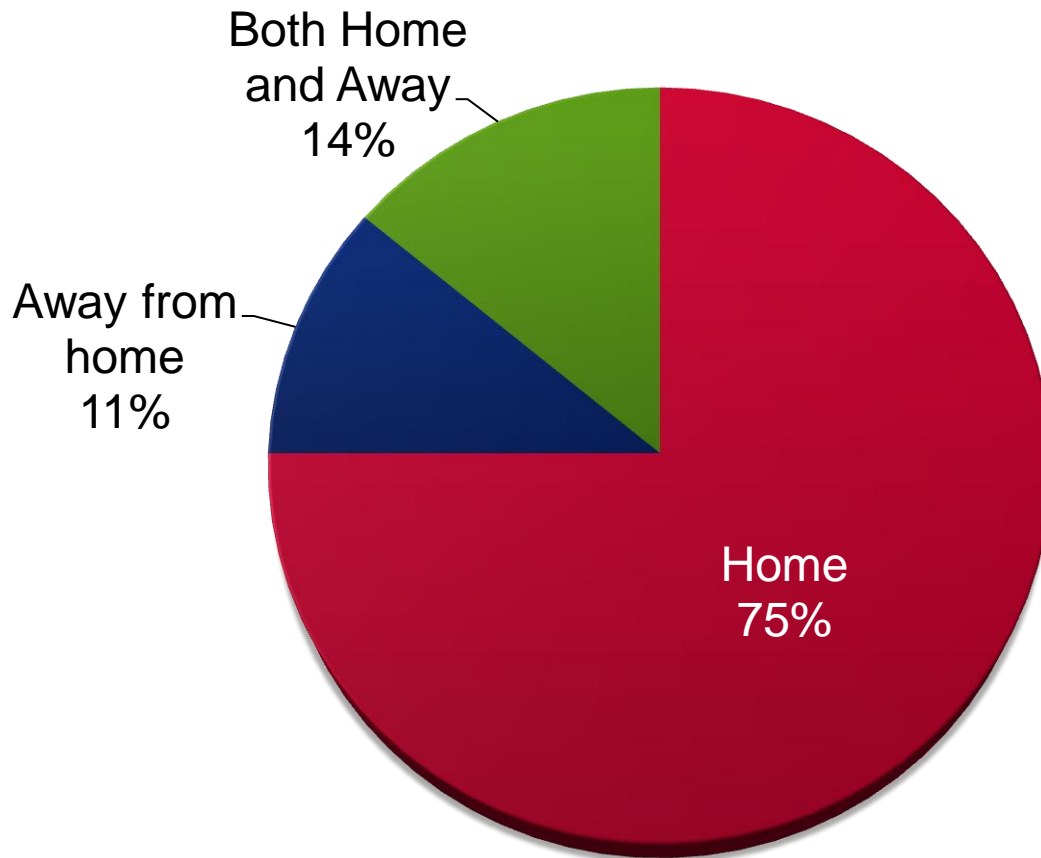
Over \$200 Billion spent on this occasion annually

And 1 in 7 people skip Breakfast





In-Home Dominates Breakfast, but Away-from-Home is Growing





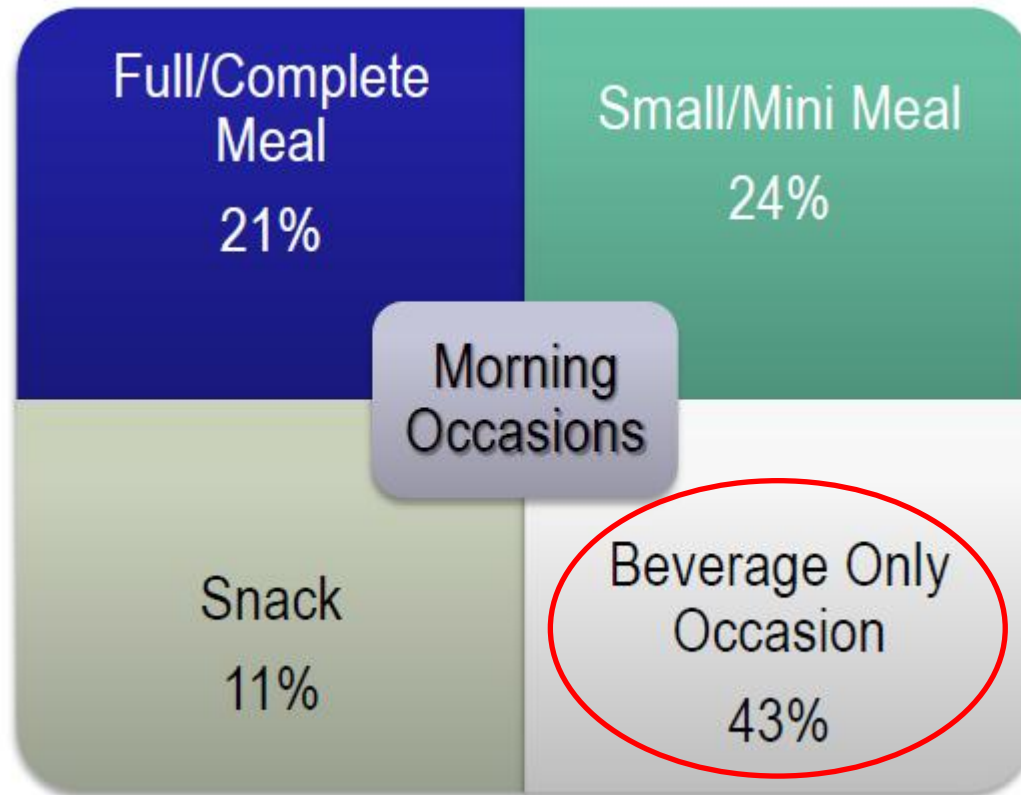
Away-from-home Breakfast Data

- 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 MealScope 2011



Breakfast tends to be Routine and Convenience Based

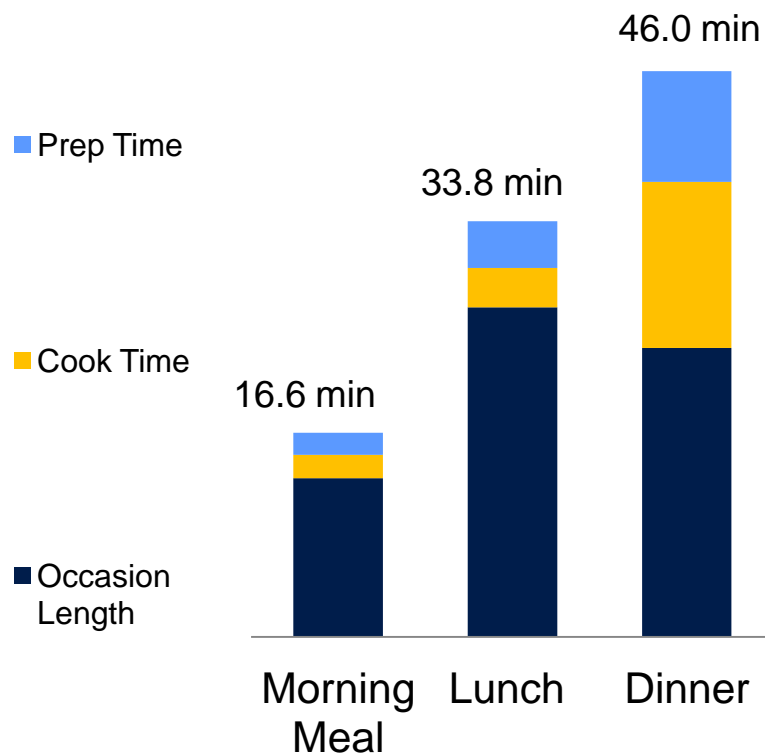
When Did You Decide What to Eat?

73%

Didn't give it
any thought



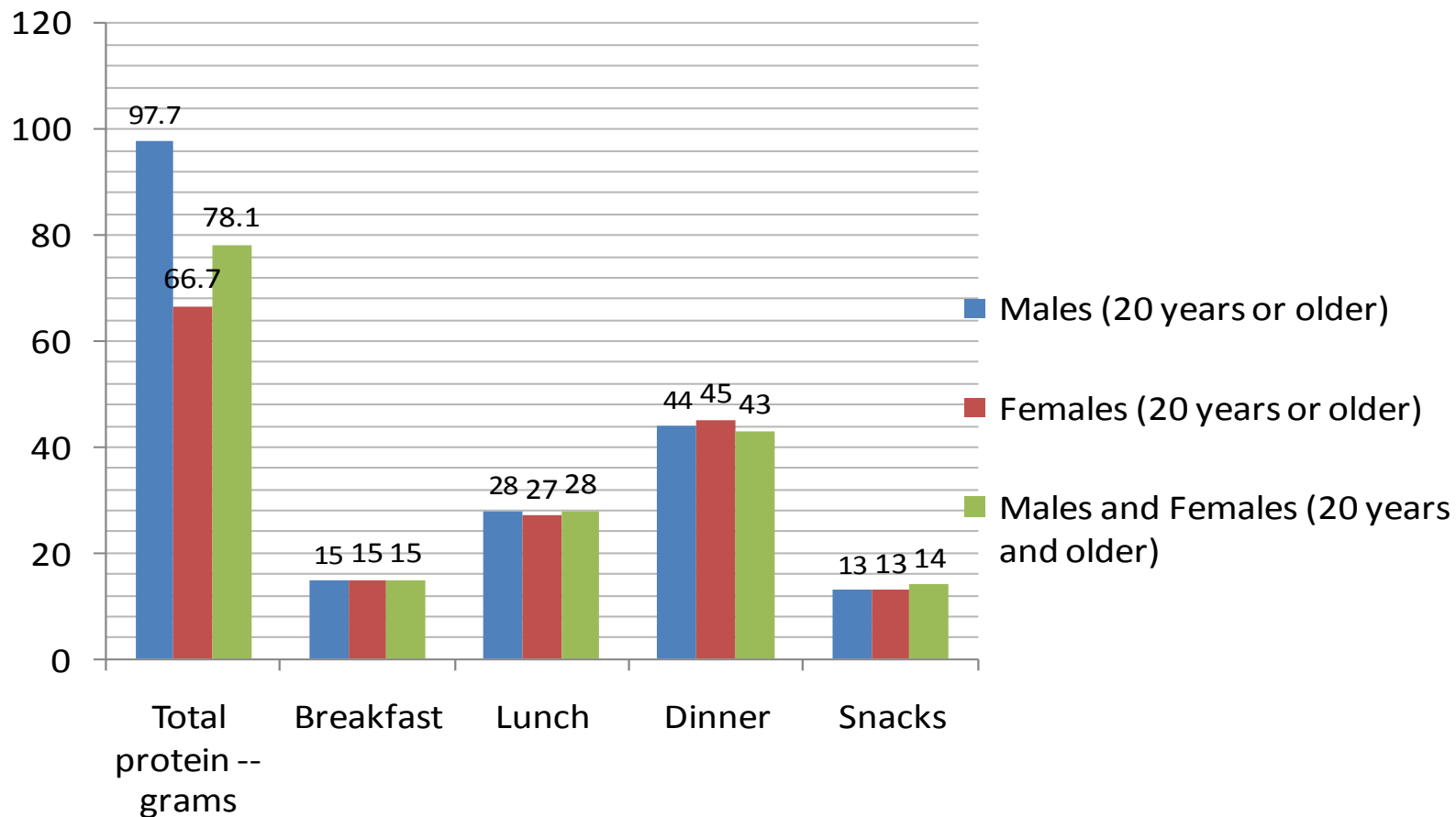
Time Spent in Minutes at Each
Meal Component



* 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



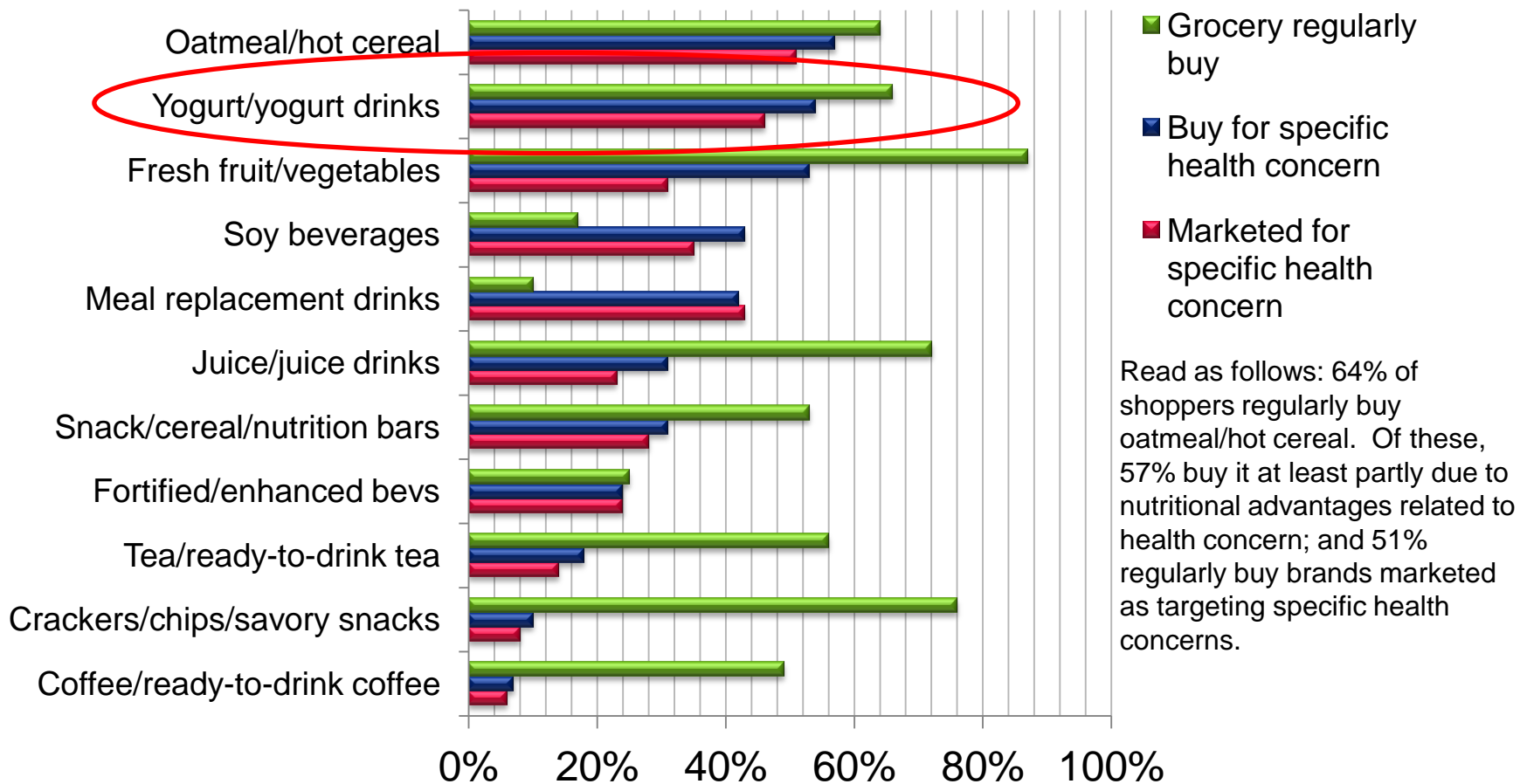
Breakfast tends to be Lacking in Protein



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)





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.



10g protein per 8oz serving

1. Consumer Attitudes Behaviors Related to Breakfast: DMI, pg 26: The NPD Group/Morning MealScape 2011

2. Yogurt Category Review 2013 Source: Datamonitor Database 2012



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Additional Breakfast Concept Ideas

Dairy Research Institute New Product Competition Winners, 2013

Moofins

The Pennsylvania State
University



Moofins are a dairy-based, quiche-like muffin created for health conscious adults seeking a high-protein breakfast item to complement their busy lifestyle

DayBreakers

Iowa State University



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

The Ohio State University



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.



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Thank you!

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