



HOW TO WIN IN BREAKFAST

INSIGHTS FROM A ROUNDTABLE WITH HAINES

HMC

WELCOME TO HOW TO WIN IN BREAKFAST



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The way we think about, talk about and go about breakfast is changing.

As evolving lifestyles and consumer expectations challenge breakfast's traditional role in our lives, we gathered insights from top industry leaders on the topic. With breakfast in hand, we explored the trends, challenges and potential opportunities for brands to adapt and win in this evolving occasion.



WHAT DOES BREAKFAST MEAN TODAY?

MEAN TODAY?

Driven by shifts in working patterns post-lockdown, the cost-of-living crisis and an ever-growing need for faster solutions - **the way we consume breakfast has changed.**

No longer a bowl of cereal at the kitchen table, we're seeing a sharp rise in speedy, on-the-go solutions as well as more emotional, social and self-care moments.

Breakfast has evolved into a dynamic occasion, taking many forms, but remains **the least skipped meal of the day.**

KANTAR

“

What do we really mean by breakfast? Essentially, it's your first meal of the day, that can be earlier or later for different people. **It takes so many forms”**

LIZ ASHDOWN, TROPICANA

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THE BIGGEST TRENDS & SHIFTS IN CONSUMPTION



ARE WE SEEING?

Boundaries are blurring:

Is breakfast past 10am now brunch? What about 'brinner?' With lines between mealtimes not as clearly defined, sweet and savoury ("swavoury") are linking arm in arm and permissible indulgence is finding its way into breakfast.

An explosion of flavour:

Taste remains the top priority for consumers and new flavour-focused products are everywhere. From caramelised biscuit to rainbow flavour, how far can fantasy flavours go?

Wellness through more:

Functional products have given rise to a 'more in' mentality to health, prioritising protein, fibre, and complete meal solutions like Huel.

Wellness through less:

In a conflicting manner, consumers are also more aware than ever of consuming less additives, sugar and processed products.



'WAYS IN' TO WINNING IN THE BREAKFAST SPACE

WAYS IN:
**BALANCING
HEALTH & INDULGENCE**

Consumers want a product that tastes great and fulfils their functional goals.

Easy right? Not so much.

As the boundaries between meal occasions blur, brands struggle to manage sugar reduction without compromising on flavour. The rise of plain and natural creates tension, leading to assumptions that tasty equals indulgent.

How can we take inspiration from products such as protein bars, **which provide permissible indulgence through flavour?**



WAYS IN:
**BALANCING
CONVENIENCE & FRESHNESS**

Meeting the demand for quick options that still feel fresh is no easy feat.

Whilst juggling the expectation for pre-packaged 'grab and go' solutions, brands must be seen to prioritise minimal ingredients and not appear processed.

Convenient packaging can change the perception of products, making them feel manufactured rather than 'crafted.'



Brands like Moju dial up freshness cues with imagery and language, calling out 'fresh' multiple times on pack.

WAYS IN:
**BALANCING
BRAND CORE & INNOVATION**

There's a temptation to keep up with trends and disrupt the category, but without a strong core - brands find their innovations fall flat.

The challenge? Knowing what is vital to your brand and what needs to be evolved.

As OTG happens in front-of-store, businesses are considering how their products translate to a new environment.



What can we learn from Weetabix On The Go about innovating within a brand's core proposition?



PRACTICAL APPLICATIONS FOR BRANDS

PLAYBOOK FOR SUCCESS

1

Stay laser-focused

In a fragmented market, don't try to be everything to everyone. Identify your target consumer and focus on delivering one clear, compelling solution to meet their needs.

2

Listen and adapt

Trends are born on platforms like TikTok. Stay plugged into what's resonating with your audience to innovate and stay ahead.

3

Build rituals

Cement your brand into daily routines -whether distinct flavours, storytelling, or creating emotional connections around the act of starting the day

4

Elevate the occasion

As breakfast becomes more functional and on-the-go, gain an edge by injecting emotion and desirability.

5

Collaborate boldly

Unexpected partnerships grab attention and are a great way to tap into blurring meal boundaries. Partner with brands your consumers already love.

KEY TAKEOUTS:

FUTURE TRENDS TO WATCH

- **Premiumised on-the-go:** With social and emotional breakfasts on the rise, finding ways to elevate the on-the-go occasion will be key. Think packaging, toppers and functional add-ins.
- **Functional for kids:** As parents become more and more wellness conscious, we're likely to see more functional health solutions for children pop up in the supermarket.
- **Personalised nutrition:** Tracking technologies are enabling consumers to make breakfast choices tailored to their unique health needs and goals, such as energy, digestion, or weight management.



WE LOOK FORWARD TO NEXT TIME!





THANK YOU

WHAT'S NEXT?

Breakfast Event

How to build emotive brands
in functional categories

January '25

Breakfast Briefing:

How to build iconic brands

March '25

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