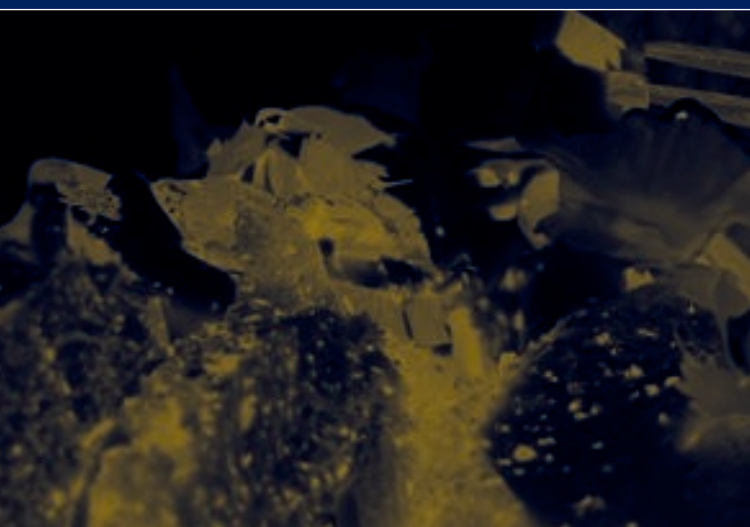




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The **Big Food** **Guide** 2011

The Essential Reference



- **Data**

- **Trends**

- **Market Sizes**

- **Forecasts to 2011**

- **Growth Opportunities**

The Big Food Guide 2011

Section 7

Breakfast Cereals & Bars



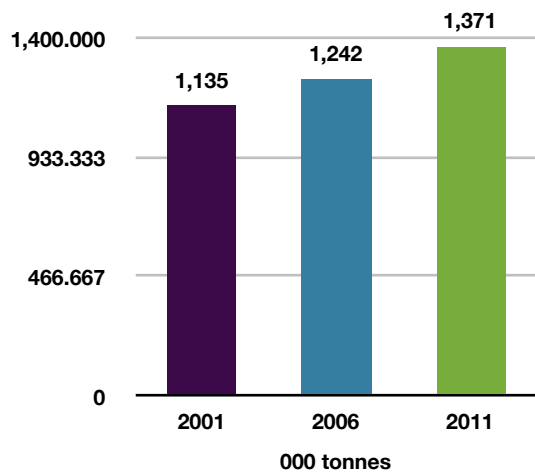
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7. Breakfast Cereals and Bars

Keynote Data

Total Consumption Trend

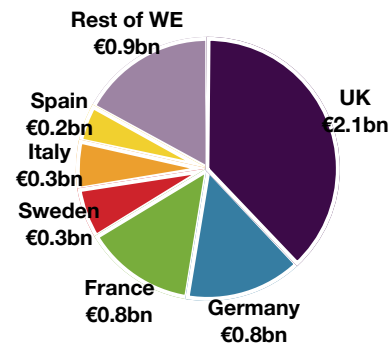
Western Europe: Total Consumption of Breakfast Cereals and Bars, 2001 - 2011



Source: RTS Resource (see notes).

Expenditure by Country

Western Europe: Share of Expenditure on Breakfast Cereals and Bars by Country, 2006

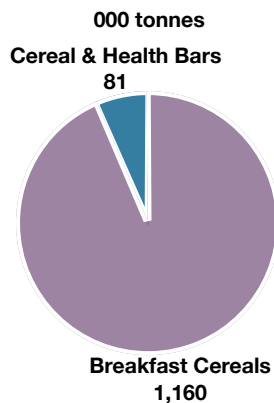


Source: RTS Resource (see notes).

Breakfast Cereals & Bars

Consumption by Product

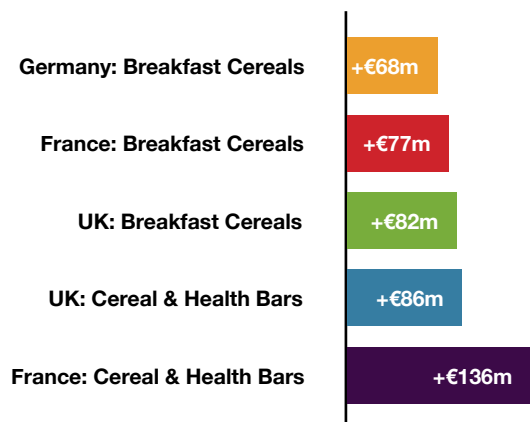
Western Europe: Share of Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Key Growth Markets

Western Europe: Forecast Additional Expenditure on Breakfast Cereals and Bars by Key Growth Market, 2006 - 2011



Source: RTS Resource (see notes).

7.1 Overview

Breakfast cereals

One of the major successes in many markets in recent years has been the rise in popularity of ready-to-eat (RTE) breakfast cereals. The traditional breakfast is being eroded by the need for “fast nutrition” and this is where the breakfast cereal has made significant inroads. However, in the largest market of the UK demand is virtually saturated although many other European markets continue to experience significant percentage increases.

For added value products, the future looks positive with continued demands for added fibre, colourings, flavours, fruit pieces and vitamins. Even intense sweeteners may be used more extensively given consumer concerns regarding sugar in the diet. Meanwhile, ‘functional’ breakfast cereals are being developed alongside, and combined with, even more convenient breakfast products such as cereal bars and breakfast snacks.

The vast majority of breakfast cereals are manufactured by major brands and companies such as Kellogg, Cereal Partners (Nestlé / General Mills) Köln and Weetabix dominate most markets although the former has reportedly lost share in recent years due to both competition from Cereal Partners and from smaller specialists.

Main trends:

- fruits and flavour ‘pieces’;
- more complex formulations;
- healthier / pre-biotic / syn-biotic;
- organic;
- functional products;
- breakfasts on-the-move.



Cereal and energy bars

One of the fastest food industry growth rates in recent years has been enjoyed by cereal and energy bars. Today there are many types available for use either as breakfast or meal replacements, snacking, for energy, isotonic or body-building. Significant further growth can be expected, although not at quite the rate of the last 5 years.

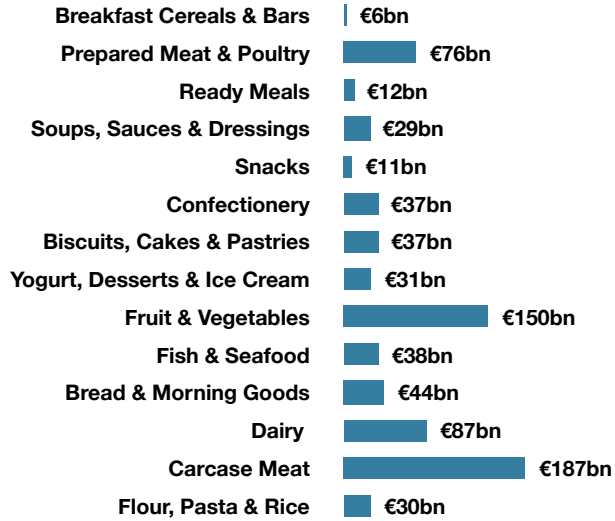
Main trends:

- wider acceptance by all age groups;
- fruits and flavour ‘pieces’;
- more complex formulations;
- healthier / low fat / low sugar / gluten-free/ pre-biotic / syn-biotic;
- organic;
- functional products.

7.2 Perspective

Expenditure by Segment

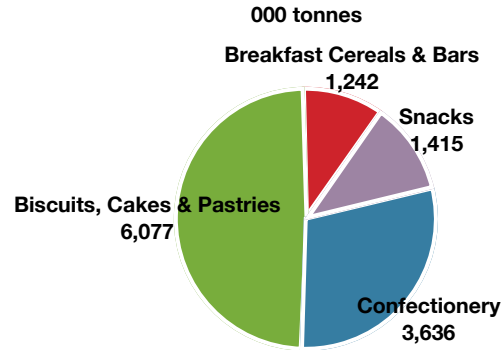
Western Europe: Expenditure on Breakfast Cereals and Bars versus other Segments, 2006



Source: RTS Resource (see notes).

Market Comparison

Western Europe: Share of Consumption of Breakfast Cereals and Bars versus Comparative Segments, 2006

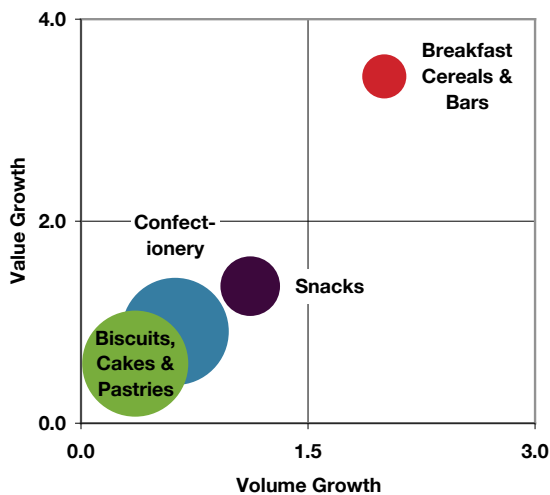


Source: RTS Resource (see notes).

Breakfast Cereals & Bars

Market Outlook to 2011

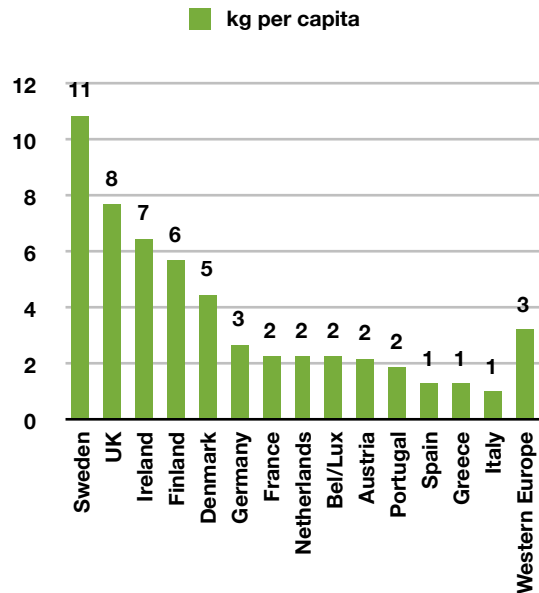
Western Europe: Forecast Growth by Key Segment, Volume versus Value, 2006 - 2011



Note: size of bubble = relative market size based on forecast expenditure 2011.
Source: RTS Resource (see notes).

Per Capita Consumption

Western Europe: Per Capita Consumption of Breakfast Cereals and Bars by Country, 2006



Source: RTS Resource (see notes).

7.3 Commentary

Total Western European consumption of Breakfast Cereals in 2006 stood at 1.2m tonnes. By way of comparison consumption of Cereal and Health Bars was much lower at 81 thousand tonnes but although it is a relatively small market in volume terms it is growing at a much faster rate.

Expenditure by country in 2006 showed the UK as the largest market by value worth €2.1bn in 2006 followed by Germany (€0.8bn) and France (€0.8bn).

In Western Europe average per capita consumption of Breakfast Cereals and Bars stands at 3.2kg in 2006 with Sweden (10.9kg per person per year) and the UK (7.7kg) leading the way.

Increased additional consumption is forecast in France (an additional 27,000 tonnes predicted between 2006 and 2011) followed by Germany (+18,000 tonnes) and Italy (+14,000 tonnes).

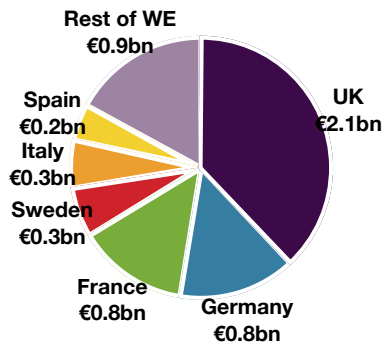
Expenditure on Breakfast Cereals in Western Europe is forecast to grow by an additional €580m to reach €5.3bn by 2011. The Cereals and Health Bars market is forecast to be worth €1.3bn and grow by an additional €437m during the same period.

Forecast consumption still has the UK as the largest market for Breakfast Cereals and Bars at 470 thousand tonnes in 2011 followed by Germany at 241 thousand tonnes and France at 171 thousand tonnes. Total consumption in Western Europe is expected to reach 1.4m tonnes.

7.4 Market Overview

Expenditure by Country

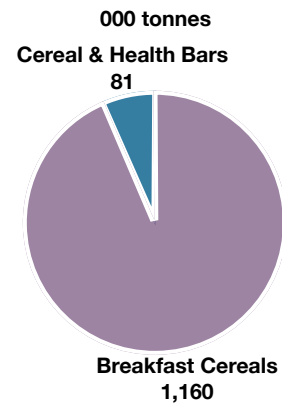
Western Europe: Total Expenditure on Breakfast Cereals and Bars by Country, 2006



Source: RTS Resource (see notes).

Consumption by Product

Western Europe: Total Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Breakfast
Cereals & Bars

Expenditure by Country

Western Europe: Expenditure on Breakfast Cereals and Bars by Country, 2006

€bn	2006
UK	€2.1
Germany	€0.8
France	€0.8
Sweden	€0.3
Italy	€0.3
Spain	€0.2
Rest of WE	€0.9
Total	€5.5

Source: RTS Resource (see notes).

Consumption by Product

Western Europe: Consumption of Breakfast Cereals and Bars by Product, 2006

000 tonnes	2006
Breakfast Cereals*	1,160
Cereal & Health Bars	81
Total	1,242

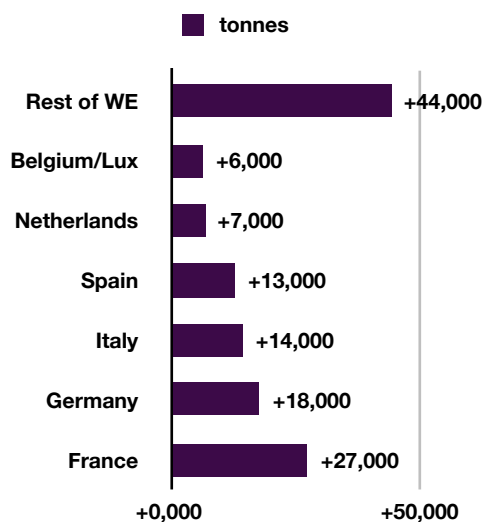
Notes: *=ready to eat

Source: RTS Resource (see notes).

7.5 Growth Opportunities

Growth Opportunities by Country

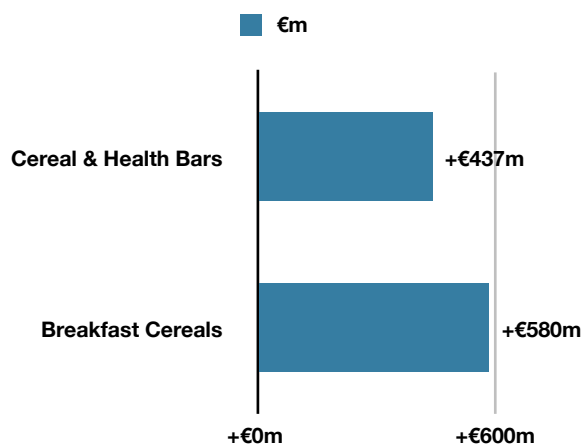
Western Europe: Forecast Additional Consumption of Breakfast Cereals and Bars by Country, 2006 - 2011



Source: RTS Resource (see notes).

Growth Opportunities by Product

Western Europe: Forecast Additional Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011



Source: RTS Resource (see notes).

Growth Opportunities by Country

Western Europe: Forecast Additional Consumption of Breakfast Cereals and Bars by Country, 2006 - 2011

000 tonnes	Growth
France	+27
Germany	+18
Italy	+14
Spain	+13
Netherlands	+7
Belgium/Lux	+6
Rest of WE	+44
Total	+129

Source: RTS Resource (see notes).

Growth Opportunities by Product

Western Europe: Forecast Additional Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	Growth
Breakfast Cereals*	+€580
Cereal & Health Bars	+€437
Total	+€1,017

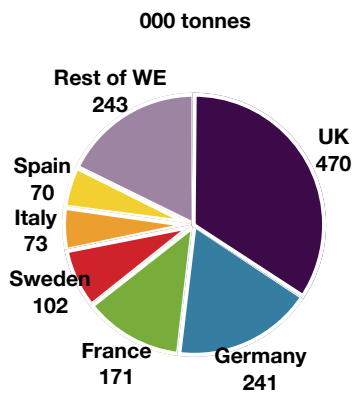
Notes: *=ready to eat

Source: RTS Resource (see notes).

7.6 Shape of the Market 2011

Forecast Consumption by Country

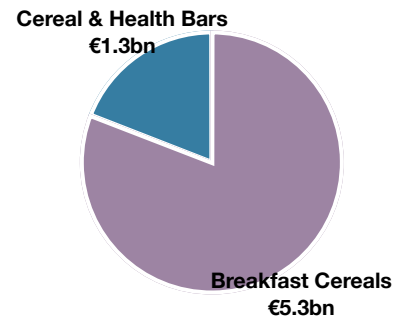
Western Europe: Forecast Share of Consumption of Breakfast Cereals and Bars by Country, 2011



Source: RTS Resource (see notes)

Forecast Expenditure by Product

Western Europe: Forecast Share of Expenditure on Breakfast Cereals and Bars by Product, 2011



Source: RTS Resource (see notes).

Breakfast Cereals & Bars

Forecast Consumption by Country

Western Europe: Forecast Consumption of Breakfast Cereals and Bars by Country, 2011

000 tonnes	2011
UK	470
Germany	241
France	171
Sweden	102
Italy	73
Spain	70
Rest of WE	243
Total	1,371

Source: RTS Resource (see notes)

Forecast Expenditure by Product

Western Europe: Forecast Expenditure on Breakfast Cereals and Bars by Product, 2011

€bn	2011
Breakfast Cereals*	€5.3
Cereal & Health Bars	€1.3
Total	€6.5

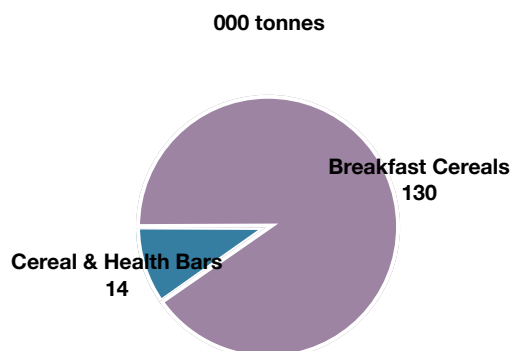
Notes: *=ready to eat

Source: RTS Resource (see notes).

7.7 France

Consumption by Product

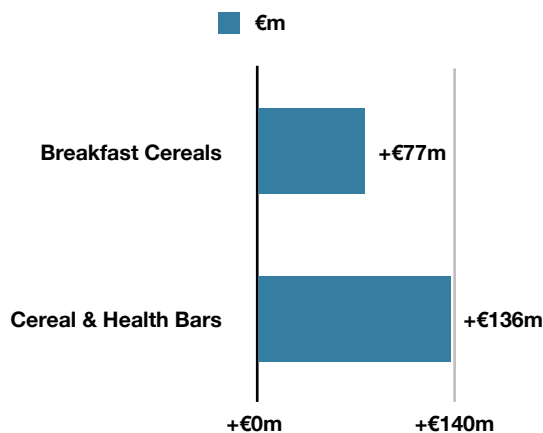
France: Share of Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Growth Opportunities by Product

France: Forecast Additional Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011



Source: RTS Resource (see notes).

Consumption by Product

France: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	6	14	31	17.1%
Breakfast Cereals*	119	130	141	1.6%
Total	125	144	171	3.5%

Notes: *=ready to eat.

Source: RTS Resource (see notes).

Forecast Expenditure by Product

France: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€127	€263	15.6%
Breakfast Cereals*	€632	€709	2.3%
Total	€760	€972	5.1%

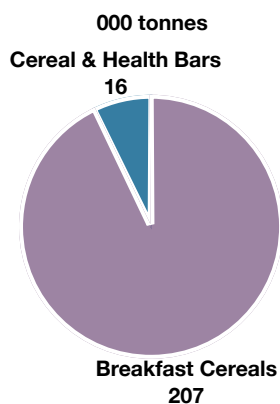
Notes: *=ready to eat.

Source: RTS Resource (see notes).

7.8 Germany

Consumption by Product

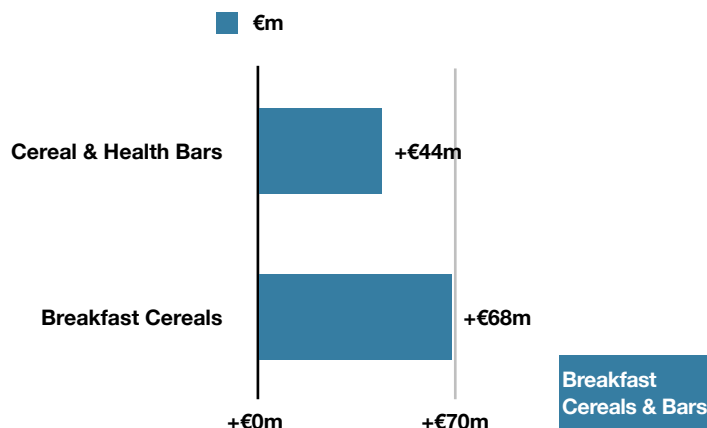
Germany: Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Growth Opportunities by Product

Germany: Forecast Additional Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011



Source: RTS Resource (see notes).

Consumption by Product

Germany: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	11	16	22	6.2%
Breakfast Cereals*	195	207	220	1.1%
Total	206	224	241	1.5%

Notes: *=ready to eat.

Source: RTS Resource (see notes).

Forecast Expenditure by Product

Germany: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€138	€181	5.6%
Breakfast Cereals*	€667	€735	2.0%
Total	€805	€917	2.6%

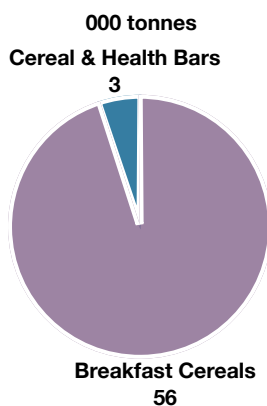
Notes: *=ready to eat.

Source: RTS Resource (see notes).

7.9 Italy

Consumption by Product

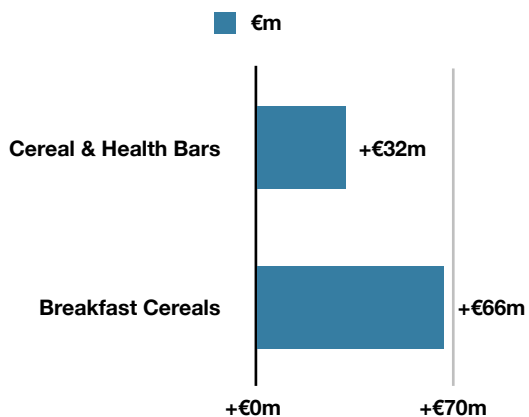
Italy: Share of Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Growth Opportunities by Product

Italy: Forecast Additional Expenditure on Breakfast Cereals and Bars by Key Product, 2006 - 2011



Source: RTS Resource (see notes).

Consumption by Product

Italy: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	1	3	7	20.5%
Breakfast Cereals*	46	56	66	3.4%
Total	47	59	73	4.5%

Notes: *=ready to eat.

Source: RTS Resource (see notes).

Forecast Expenditure by Product

Italy: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€17	€49	23.0%
Breakfast Cereals*	€312	€378	3.9%
Total	€329	€428	5.4%

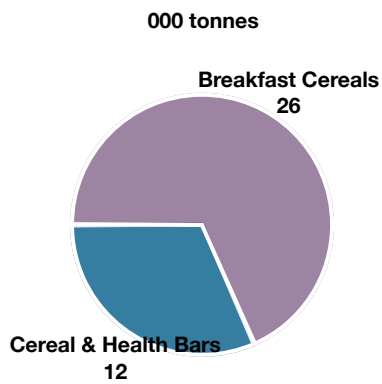
Notes: *=ready to eat.

Source: RTS Resource (see notes).

7.10 The Netherlands

Consumption by Product

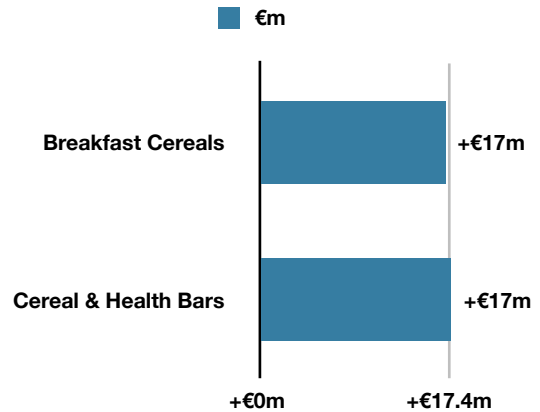
The Netherlands: Share of Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Growth Opportunities by Product

The Netherlands: Forecast Additional Expenditure on Breakfast Cereals and Bars by Key Product, 2006 - 2011



Source: RTS Resource (see notes).

Consumption by Product

The Netherlands: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	9	12	15	4.8%
Breakfast Cereals*	24	26	30	2.7%
Total	33	38	44	3.4%

Notes: *=ready to eat.

Source: RTS Resource (see notes).

Forecast Expenditure by Product

The Netherlands: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€76	€93	4.2%
Breakfast Cereals*	€92	€109	3.4%
Total	€167	€202	3.8%

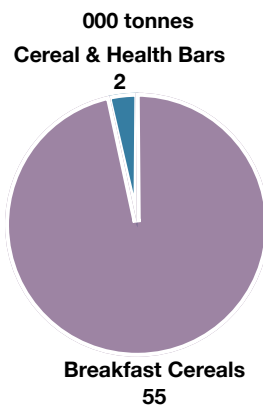
Notes: *=ready to eat.

Source: RTS Resource (see notes).

7.11 Spain

Consumption by Product

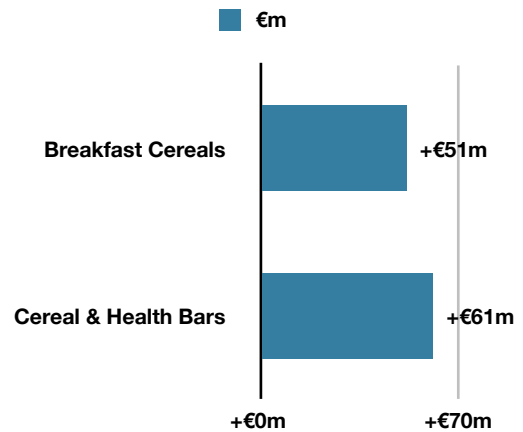
Spain: Share of Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Growth Opportunities by Product

Spain: Forecast Additional Expenditure on Breakfast Cereals and Bars by Key Product, 2006 - 2011



Source: RTS Resource (see notes).

Consumption by Product

Spain: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	2	5	17.6%
Breakfast Cereals*	45	55	65	3.5%
Total	45	57	70	4.1%

Notes: *=ready to eat.

Source: RTS Resource (see notes).

Forecast Expenditure by Product

Spain: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€11	€71	46.4%
Breakfast Cereals*	€239	€291	4.0%
Total	€250	€362	7.7%

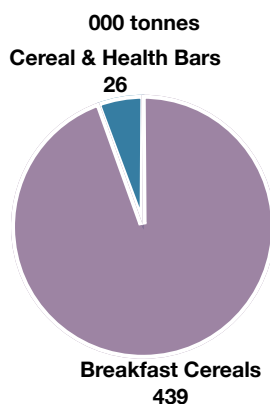
Notes: *=ready to eat.

Source: RTS Resource (see notes).

7.12 UK

Consumption by Product

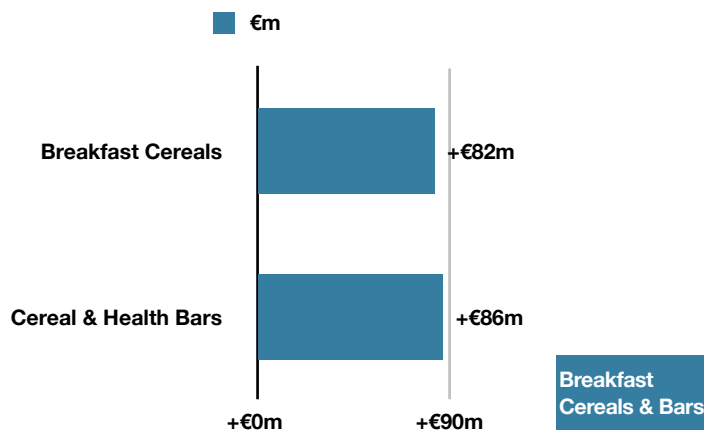
UK: Share of Consumption of Breakfast Cereals and Bars by Product, 2006



Source: RTS Resource (see notes).

Growth Opportunities by Product

UK: Forecast Additional Expenditure on Breakfast Cereals and Bars by Key Product, 2006 - 2011



Source: RTS Resource (see notes).

Consumption by Product

UK: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	14	26	31	3.7%
Breakfast Cereals*	445	439	439	0.0%
Total	459	465	470	0.2%

Notes: *=ready to eat.

Source: RTS Resource (see notes).

Forecast Expenditure by Product

UK: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€356	€442	4.4%
Breakfast Cereals*	€1,746	€1,828	0.9%
Total	€2,103	€2,271	1.6%

Notes: *=ready to eat.

Source: RTS Resource (see notes).

7.13 Rest of Western Europe

Austria: Consumption by Product

Austria: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	1	3	5	12.7%
Breakfast Cereals*	12	15	18	4.4%
Total	13	18	24	6.0%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Belgium/Lux: Consumption by Product

Belgium/Lux: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	3	4	6	8.7%
Breakfast Cereals*	17	21	25	3.9%
Total	20	25	31	4.7%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Denmark: Consumption by Product

Denmark: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	ns	ns	1	**
Breakfast Cereals*	19	24	30	4.2%
Total	19	24	30	4.4%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Finland: Consumption by Product

Finland: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	nd	nd	**
Breakfast Cereals*	25	30	35	3.2%
Total	25	30	35	3.2%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Austria: Forecast Expenditure by Product

Austria: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€28	€50	12.5%
Breakfast Cereals*	€71	€90	4.8%
Total	€99	€139	7.2%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Belgium/Lux: Forecast Expenditure by Product

Belgium/Lux: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€37	€54	8.2%
Breakfast Cereals*	€93	€115	4.3%
Total	€129	€169	5.5%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Denmark: Forecast Expenditure by Product

Denmark: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€6	€11	11.6%
Breakfast Cereals*	€109	€136	4.6%
Total	€115	€147	5.1%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Finland: Forecast Expenditure by Product

Finland: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	nd	**
Breakfast Cereals*	€104	€124	3.7%
Total	€104	€124	3.7%

Notes: *=ready to eat.

Source: **RTS Resource** (see notes).

Greece: Consumption by Product

Greece: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	nd	nd	**
Breakfast Cereals*	9	14	20	7.4%
Total	9	14	20	7.4%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Ireland: Consumption by Product

Ireland: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	1	2	15.0%
Breakfast Cereals*	23	26	30	3.1%
Total	23	27	32	3.6%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Portugal: Consumption by Product

Portugal: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	nd	nd	**
Breakfast Cereals*	15	20	26	5.2%
Total	15	20	26	5.2%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Sweden: Consumption by Product

Sweden: Consumption of Breakfast Cereals and Bars by Product, 2001 - 2011

000 tonnes	2001	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	1	2	13.8%
Breakfast Cereals*	95	97	101	0.8%
Total	95	98	102	0.9%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Greece: Forecast Expenditure by Product

Greece: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	nd	**
Breakfast Cereals*	€106	€154	7.7%
Total	€106	€154	7.7%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Ireland: Forecast Expenditure by Product

Ireland: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€11	€22	15.3%
Breakfast Cereals*	€102	€122	3.6%
Total	€113	€144	5.0%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Portugal: Forecast Expenditure by Product

Portugal: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	nd	nd	**
Breakfast Cereals*	€110	€143	5.4%
Total	€110	€143	5.4%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Sweden: Forecast Expenditure by Product

Sweden: Expenditure on Breakfast Cereals and Bars by Product, 2006 - 2011

€m	2006	2011	CAGR 2006-2011
Cereal & Health Bars	€8	€14	12.3%
Breakfast Cereals*	€333	€361	1.7%
Total	€341	€375	2.0%

Notes: *=ready to eat.
Source: **RTS Resource** (see notes).

Breakfast
Cereals & Bars



Exclusive extract taken from

The Big Food Guide 2011

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Prepared Meat & Poultry

- Sausages • Burgers
- Bacon & Ham • Prepared Poultry • Other Meats
- Canned Meats • Pizzas • Sandwiches • Vegetarian Foods

Ready Meals

- Chilled Meals • Frozen Meals
- Canned & Ambient Meals • Dry Meals

Soups, Sauces & Dressings

- Fresh & Chilled Soup • Canned Soup • Cube & Packet Soup • Instant Soup
- Bouillon / Similar • Condiment Sauces • Sauces for Pasta
- Cooking Sauces • Dry Sauces Mixes • Salad Dressings
- Condiments, Pickles & Relishes • Herbs & Spices
- Culinary Fats & Oils

Snacks

- Potato Crisps • Extruded & Other Snacks
- Baked Snacks • Nuts • Pot Snacks

Confectionery

- Tablets & Unfilled Chocolate
- Filled Tablets & Bars • Pralines & Other Sweets
- Other Chocolate Confectionery • Chewing Gum
- Boiled Sugar Sweets • Toffees, Caramels & Chews
- Gums, Jellies, Pastilles • Other Sweets (including medicated)

Biscuits, Cakes & Pastries

Breakfast Cereals & Health Bars

Yogurt, Desserts, Ice Cream

- Yogurts & Similar
- Chilled & Cream Desserts • Other Milk Desserts
- Other Desserts • Ice Cream

Fruit & Vegetables

- Fresh Fruit • Canned Fruit
- Dried Fruit • Fresh Vegetables • Fresh Potatoes
- Frozen Potato Products • Canned Vegetables
- Frozen Vegetables & Fruit • Pulses & Beans
- Jams & Preserves • Sugar (Sucrose) • Honey
- Intense Sweeteners • Eggs

Fish & Seafood

Bread & Morning Goods

Dairy

- White Milk • Milk Drinks • Butter • Margarine
- Bread Spreads • Cheese • Cream • Condensed Milk

Carcase Meat

- Pigeon • Beef & Veal • Poultry
- Sheepmeat • Frozen Meats • Frozen Poultry • Offal

Flour, Pasta & Rice

France • Germany • Italy • The Netherlands • Spain • UK

Austria • Belgium/Luxembourg • Denmark • Finland • Greece • Ireland • Portugal • Sweden

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