Agriculture and Agri-Food Canada
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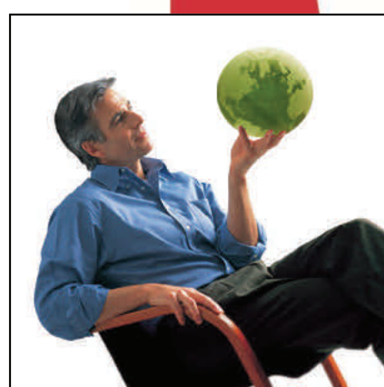
International Markets Bureau

MARKET INDICATOR REPORT | MARCH 2013

Natural or Organic Cold Breakfast Cereals in the United States

Source: Planet Retail Ltd.



Growing Forward

Canada

OVERVIEW

Ready-to-eat (RTE) cereals are a popular way to start the day amongst American consumers. The bulk of breakfast cereal eatings were of RTE cereals (78.5%), which include children's breakfast cereals and family breakfast cereals, while hot cereals made up the remaining 21.5% of eatings, according to the NPD Group's National Eating Trends database* (November 2011).

Total retail sales in the United States (U.S.) of breakfast cereals totaled US$10 billion in 2011, up from US$9.9 billion in 2010, an increase of 6.3% between 2006 and 2011, for a compound annual growth rate (CAGR) of 1.2%. As volume sales declined by 1.5%, growth in value sales was driven primarily by higher prices, which was, in turn, largely a result of increasing grain prices. Value sales are forecasted to continue to grow by 3.6% between 2011 and 2016 (0.7% CAGR), and volume sales are expected to decline by 1.7% between 2011 and 2016 (Euromonitor, September 2011).

The greatest growth seen among packaged food in health and wellness food categories between 2007 and 2012 was for gluten-free food (16.7% CAGR, based on provisional 2012 data, Euromonitor, 2012).

Between January 2007 and October 2012, about 60% of all new cold cereals introduced in the U.S. used a positioning claim related to the product being "natural." New cold cereal introductions in the U.S. that used specific claims of "all natural product" or "organic" make up the bulk of the analysis in this report and comprise 1,165 products out of the total 1,917 introductions in that timeframe (Mintel, 2012).

Breakfast cereals face increasing competition, not only from other new product introductions, but also from other popular breakfast foods, both in-home and from foodservice venues. Product innovation, consumption at other times of the day, and additional uses for the product, such as use as an ingredient in baked goods, may help grow these products in this mature market.

*For additional information, please refer to AAFC's American Eating Trends Report on *Breakfast Cereals*.

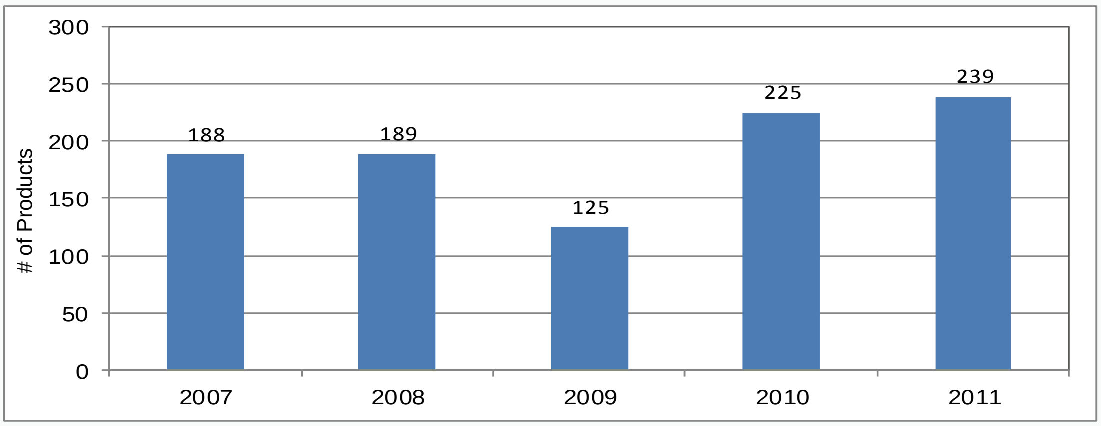
INSIDE THIS ISSUE

Source: *Planet Retail Ltd.*

NEW PRODUCT LAUNCHES

- Between 2007 and 2011, 966 new cold breakfast cereals entered the U.S. market using a claim related to “natural,” as classified in the Mintel database. These claims include “all natural product,” “GMO-free,” “no additives/preservatives,” “organic,” and “wholegrain.”
- With the exception of 2009, the number of product introductions shows an increasing trend over this time period (Mintel, 2012).
- This report and all of the tables and charts will focus on those cereal products introduced with a claim relating to “natural” as classified in the Mintel database, unless otherwise specified.

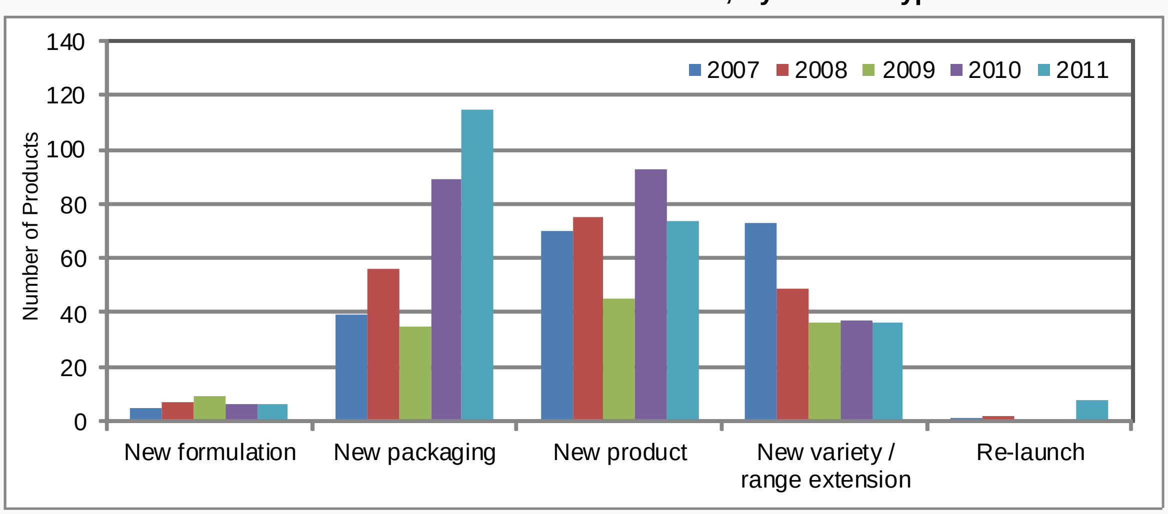
Natural or Organic Cold Breakfast Cereals
New Product Introductions in the U.S., 2007-2011



Source: *Mintel, 2012.*

- In this time period, the number of products with new packaging shows an increasing trend, with the exception of 2009. The majority of products with new packaging were introduced in 2010 and 2011. There are large fluctuations in the number of introductions of entirely new products, with the most being introduced in 2010 and the least introduced in 2009. The number of new varieties or range extensions was relatively stable between 2009 and 2011, having sharply declined from their peak in 2007 (Mintel, 2012).

Natural or Organic Cold Breakfast Cereals
New Product Introductions in the U.S., By Launch Type

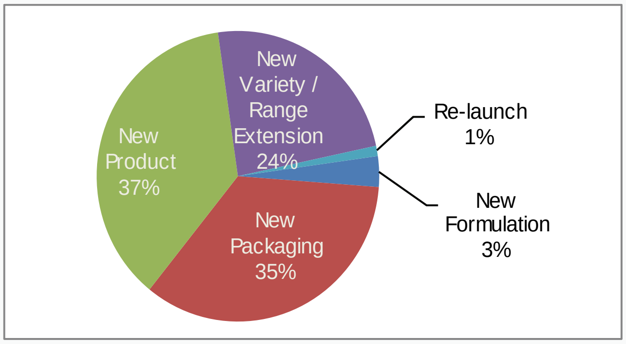


Source: *Mintel, 2012.*

LAUNCH TYPES

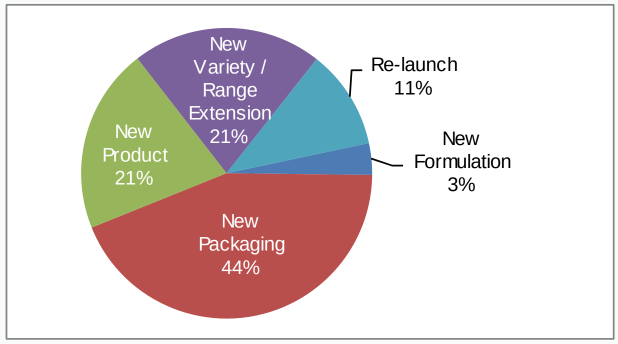
- Overall, the majority of new product introductions between 2007 and 2011 were entirely new products (37%), or products with new packaging (35%). New varieties and range extensions made up 24% of the introductions, and the remainder was composed of new formulations (3%) and re-launches (1%) (Mintel, 2012).
- Between January and October 2012, 199 new cold cereal products were introduced in the U.S., with a focus on new packaging (44%). There was growth in re-launches (11% of the introductions compared to only 1% in the previous five years), while there was a decline in the number of entirely new products introduced to the market (21%) (Mintel, 2012).

New Cold Breakfast Cereal Introductions in the U.S., 2007-2011



Source: *Mintel, 2012.*

New Cold Breakfast Cereal Introductions in the U.S., January-October 2012



Source: *Mintel, 2012.*

ALLERGEN WARNINGS

- Almost one half of the 966 new cold cereal products introduced between 2007 and 2011 displayed an allergen warning. In this time period, wheat or gluten warnings were by far the most frequently used, appearing on 435 new natural or organic cereal products, the majority in 2010 and 2011. “Cereal containing gluten” appeared on 68 products over this same time period, all but one of which were introduced in 2011 (Mintel, 2012).
- From January to October 2012, warnings concerning the presence of wheat appeared on 114 of the 199 new cereal product introductions, while “cereal containing gluten” was used on 111 new products. The presence of nuts or tree nuts was indicated on 46 new products (Mintel, 2012).

Allergen Warnings on New Cold Cereal Products in the United States, 2007-2012*

Allergens/Warnings	2007	2008	2009	2010	2011	2012*	Total # of Products
Wheat	53	81	57	108	136	114	549
Nuts/tree nuts	18	40	28	53	48	46	233
Soybeans	38	39	27	49	41	31	225
Cereal containing gluten	0	0	0	1	67	111	179
Milk	32	25	13	25	20	30	145
Peanuts	5	7	6	1	6	3	28
Sulphur dioxide/sulphites	0	0	0	1	2	0	3
Sesame seeds	0	0	0	2	0	0	2

Source: *Mintel, 2012.* ** Partial year, January-October 2012.*

POSITIONING CLAIMS

- Product positioning poses a challenge for cold breakfast cereals, particularly those targeted toward young children. While manufacturers of new cold cereal products strive to provide improved nutrient profiles or other health-related attributes that are demanded by consumers, such as increased fibre content, sugar or salt content tend to remain high to enhance taste.
- Between 2007 and 2011, the most popular claims used on new cold cereal products were: "wholegrain" (714 products); "kosher" (659 products); and "ethical - environmentally friendly package" (421 products). Claims of "all natural product" (259 products), "organic" (234 products) and "no additives preservatives" (267 products) were also popular, appearing on approximately one in four cereal product introductions (Mintel, 2012).
- Although a little further down the list, the claim of "GMO-free" has also been growing in incidence among new cold cereal product launches in the United States, appearing on 81 introductions from 2007 to 2011.

Most Popular Claims Used on New Cold Cereal Products in the United States, 2007-2011

Claims	2007	2008	2009	2010	2011	Total Products
Wholegrain	128	143	94	171	178	714
Kosher	135	113	89	167	155	659
Ethical - environmentally friendly package	8	36	71	142	164	421
No additives/preservatives	45	46	49	75	52	267
All natural product	52	33	36	73	65	259
Organic	70	53	26	46	39	234
Low/no/reduced fat	66	46	28	37	42	219
High/added fibre	62	39	7	27	73	208
Low/no/reduced trans fat	36	35	38	45	37	191
Low/no/reduced cholesterol	36	36	16	49	43	180
Children (5-12)	15	18	15	40	38	126
Low/no/reduced allergen	12	6	23	21	35	97
Low/no/reduced sodium	22	18	9	24	23	96
Cardiovascular (functional)	8	18	9	28	31	94
GMO-free	6	13	21	16	25	81
Ethical - charity	12	14	14	11	26	77
Gluten-free	5	4	18	16	32	75
Vitamin/mineral fortified	29	16	7	11	12	75
Low/no/reduced sugar	10	5	16	20	22	73
Ethical - environmentally friendly product	5	8	13	18	26	70
Antioxidant	12	17	10	10	20	69

Source: *Mintel, 2012.*

POSITIONING CLAIMS (continued)

- In 2012, "wholegrain" (172 products); "ethical - environmentally friendly package (148 products); and "kosher" (137 products) continued to lead the claim category for new cereal launches. "No additives/preservatives" appeared on 44 new products, "all natural product" on 38 new products, and "organic" appeared on 29 new products in this timeframe (Mintel, 2012).

- "High protein" is another positioning claim used by some breakfast cereal manufacturers in the U.S. and is gaining popularity in advertisements, but may not necessarily appear on product packaging.

Most Popular Claims Used on New Cold Cereal Products in the United States, January to October 2012

Claims	# of Products	Claims	# of Products
Wholegrain	172	Ethical - charity	15
Ethical - environmentally friendly package	148	Low/no/reduced sodium	15
Kosher	137	Ethical - environmentally friendly product	14
High/added fibre	56	Event merchandising	14
No additives/preservatives	44	Low/no/reduced allergen	13
All natural product	38	Vitamin/mineral fortified	13
Children (5-12)	37	Gluten-free	12
Low/no/reduced cholesterol	32	On-the-go	12
Low/no/reduced transfat	29	Low/no/reduced saturated fat	11
Organic	29	Slimming	11
Low/no/reduced fat	25	Other (functional)	10
GMO-free	22	Convenient packaging	9
Cardiovascular (functional)	20	Economy	9
Social media	17		

Source: *Mintel, 2012.*

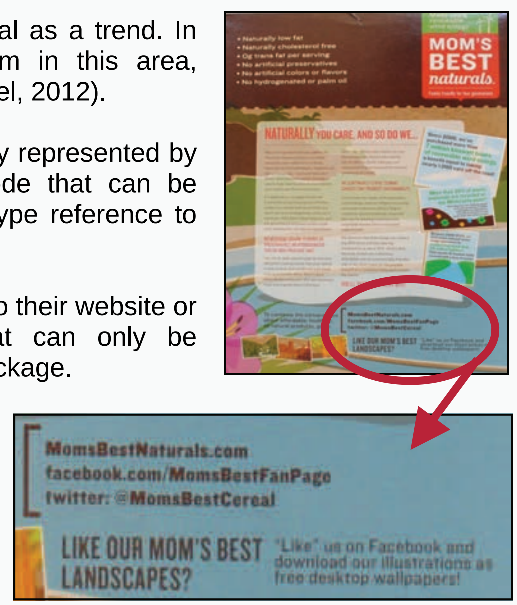
SOCIAL MEDIA MARKETING

- The use of social media as a packaging claim shows potential as a trend. In 2011, only one new cold cereal product displayed a claim in this area, jumping to 17 products between January to October 2012 (Mintel, 2012).

- Social media claims on breakfast cereals in the U.S. are largely represented by Facebook and Twitter references via a QR code (a barcode that can be scanned by mobile devices), a direct URL, or a "follow us" type reference to their page.

- Manufacturers are also using codes to link consumers directly to their website or other promotional offers, such as printable coupons, that can only be accessed with a redemption code found inside the product's package.

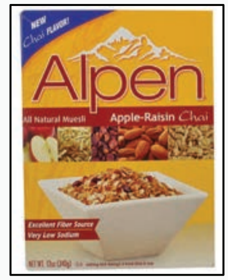
- Advertising through social media may help to grow additional eating occasions of cereal, as Mintel`s custom research indicates that 55% of young adults (18-34 year olds) sometimes eat cereal as a snack. According to the Pew Internet Project, 93% of internet users 18-29 years old and 73% of Internet users 30-49 years old also use social networking sites (August 2012).



The back side of the package for Mom's Best Naturals Crispy Cocoa Rice Cereal.
Source: *Mintel, 2012.*

EXAMPLES OF NEW COLD CEREAL PRODUCTS

The following are some examples of new organic and/or natural cold cereal products launched in the U.S. market between January 2007 and October 2012, from the Mintel Global New Products Database (2012).



Source: *Mintel, 2012.*

All Natural Apple-Raisin Chai Muesli, Barbara's Bakery

Price: US$3.99

Description: Alpen All Natural Apple-Raisin Chai Muesli is a blend of wholegrain oats, barley, flax seeds, wheat flakes, toasted soy nuggets, raisins and apple pieces, spiced to provide a chai flavour. It claims to be an excellent source of fibre, and is said to be very low in sodium. This product is also said to contain no added salt or GMO; is a good source of iron, phosphorus, and magnesium; is free from artificial flavours, additives and preservatives; is a good source of protein, contains 0 g trans fat per serving and is naturally cholesterol free. This product is said to be suitable for lacto-ovo vegetarians and is kosher-certified. It retails in a 12-oz. carton which is made from 100% recycled cardboard, using a minimum of 65% post-consumer content and is produced using 100% clean energy and 100% carbon neutral paperboard. The pack features both Heart Healthy and GreenChoice 100 logos.

Positioning claims: No additives/preservatives, all natural product, low/no/reduced cholesterol, high/added fibre, kosher, low/no/reduced sodium, vegetarian, low/no/reduced transfat, wholegrain, ethical - environmentally friendly package, carbon neutral, GMO-free

Source: *Mintel, 2012.*

Chunky Cocoa Granola, Mountain Rise Organics

Price: US$9.69

Description: This granola is said to be homemade with certified organic whole grains, and is free from nuts and peanuts. This product retails in a 13-oz. pack and is also available in Original Granola, Vegan Granola, and Spice of Life Granola varieties.

Positioning claims: Organic, wholegrain, low/no/reduced allergen

Source: *Mintel, 2012.*

Organic Hemp Plus, Nature's Path Foods

Price: US$3.99

Description: Nature's Path Organic Hemp Plus claims to be a certified kosher and organic cereal containing flax and hemp seeds that are said to boost nutrition with 600 mg of omega-3 fatty acids and 1800 mg of omega-6 fatty acids per serving. This wholegrain product claims to be free from synthetic preservatives and additives, contains no GMO ingredients, and is high in fibre and low in sodium. This product retails in a redesigned 11.5-oz. package that bears the manufacturer's Facebook and Twitter details, in addition to the Forest Stewardship Council (FSC) label for sustainable management of paper resources.

Positioning claims: No additives/preservatives, high/added fibre, kosher, organic, low/no/reduced sodium, wholegrain, ethical - environmentally friendly package, GMO-free, social media

EXAMPLES OF NEW COLD CEREAL PRODUCTS (continued)

Source: *Mintel, 2012.*

<u>Crapola Cranberry Apple Granola, Brainstorm Bakery</u>

Price: US$7.99

Description: Crapola Cranberry Apple Granola claims to be made from organic grains and premium ingredients, to combine great taste with wholesome nutrition. This product is baked in small batches and retails in a 12-oz. pack.

Positioning claims: Organic, premium, wholegrain

<u>Ancient Grains Granola, Small Planet Foods</u>

Price: US$3.28

Description: This wholegrain product contains quinoa, spelt and kamut khorasan wheat, which is lightly sprinkled with cinnamon and brown sugar. This kosher product claims to be an excellent source of fibre, and does not contain genetically modified organisms (GMO), artificial additives or preservatives. Facebook and Twitter links are featured on its 12.5-oz. recyclable box.

Positioning claims: No additives/preservatives, high/added fibre, kosher, organic, wholegrain, ethical - environmentally friendly package, GMO-free, social media

Source: *Mintel, 2012.*

Source: *Mintel, 2012.*

<u>All Natural Honey Oat Granola Clusters, Big Sky Natural Foods Company</u>

Price: US$7.49

Description: These granola clusters are made of whole grain oats, wildflower honey, vanilla, and sunflower, pumpkin and sesame seeds and are kosher-certified and available in a newly designed 12-oz. package. They are claimed to be delicious as a cereal, sprinkled on yogurt, or consumed as an energy snack throughout the day.

Positioning claims: All natural product, kosher, wholegrain

<u>An Ox All-Natural Raw Cereal, Muesli Fusion</u>

Price: US$7.19

Description: This cereal claims to be packed with some of the highest antioxidant foods available such as goji berries, blueberries, cocoa ribs and walnuts. It is said to be made with all-organic grains to keep the body pure, contains 100% whole grains, is rich in protein and low in fat. The product retails in a 12-oz. recyclable package. The following varieties are also available: Classic Swiss; Harvest Festival; and Berry Burst.

Positioning claims: All natural product, antioxidant, ethical - charity, ethical - environmentally friendly package, low/no/reduced fat, organic, wholegrain

Source: *Mintel, 2012.*

MARKET SIZE

- Retail sales value for health and wellness food categories (natural and organic cereals are categorized among these) all grew between 2007 and 2012, with the exception of lactose-free food which experienced a CAGR of -1.7%.
- Gluten-free food experienced the greatest growth in this period, with a CAGR of 16.7%. Diabetic food (5.2% CAGR), naturally healthy packaged food (4.5% CAGR) and organic packaged food (3.4% CAGR) experienced good growth, while fortified/functional packaged food grew the least, at 0.9% CAGR.
- These food categories are forecast to continue growing to 2017. Although the value of lactose-free food sales declined between 2007 and 2012, a 3.9% CAGR is forecast between 2012 and 2017, slightly higher than fortified/functional packaged food (3.4% CAGR) and diabetic food (3.3% CAGR). Gluten-free food is forecast to continue leading these categories with a CAGR of 9.2%, followed by organic packaged food (5.8% CAGR) and naturally healthy packaged food (4.6% CAGR) (Euromonitor, 2012).

Market Size – Historic Retail Value Sales in US$ millions, 2007-2012

Category	2007	2008	2009	2010	2011	2012
Diabetic food	234.5	258.3	281.2	293.8	298.9	301.9
Gluten-free food	187.4	225.5	262.7	307.9	349.6	405.1
Lactose-free food	1,764.7	1,755.4	1,686.7	1,645.5	1,681.2	1,645.7
Fortified/functional packaged food	31,095.3	32,803.3	30,896.8	31,237.4	32,928.0	32,585.2
Naturally healthy packaged food	15,282.2	16,369.7	17,395.6	18,112.1	18,591.8	19,007.4
Organic packaged food	9,558.5	10,613.4	10,290.3	10,556.9	11,087.6	11,302.9

Source: *Euromonitor, 2012.*
Note: *All 2012 data is provisional and based on part-year estimates.*

Market Size – Forecast Retail Value Sales in US$ millions, 2012-2017

Category	2012	2013	2014	2015	2016	2017
Diabetic food	301.9	314.2	325.8	335.0	345.1	355.7
Gluten-free food	405.1	461.3	508.1	550.3	590.7	628.7
Lactose-free food	1,645.7	1,778.2	1,824.6	1,861.6	1,926.3	1,995.8
Fortified/functional packaged food	32,585.2	33,794.9	34,974.0	36,150.7	37,268.0	38,509.1
Naturally healthy packaged food	19,007.4	19,920.1	20,867.5	21,811.6	22,832.0	23,829.2
Organic packaged food	11,302.9	11,954.1	12,641.1	13,346.1	14,143.5	14,985.3

Source: *Euromonitor, 2012.*
Note: *All 2012 data is provisional and based on part-year estimates.*

SALES TRENDS

- The American breakfast cereal market is highly competitive, facing pressure from other popular breakfast foods, such as eggs, toast, breakfast meat, fresh fruit, yogurt, or bakery products, in addition to other hot and cold cereal products and foodservice options (Mintel, February 2012). Cereal sales are also being impacted by higher product prices (due to increased commodity ingredient prices). The disproportionate growth in value versus volume sales experienced by some cereal categories, as well as a trend toward smaller package sizes, is likely indicative of these factors.

Sales of Breakfast Cereals by Category, Value in US$ millions, 2006-2011

	2006	2007	2008	2009	2010	2011*	CAGR
Hot cereals	1,159.0	1,153.4	1,173.8	1,143.7	1,115.6	1,094.7	-1.1%
RTE cereals	8,270.0	8,389.4	8,767.3	8,900.0	8,791.4	8,926.3	1.5%
Children's breakfast cereals	2,758.7	2,756.2	2,802.9	2,876.1	2,792.7	2,826.5	0.5%
Family breakfast cereals	5,511.3	5,633.3	5,964.5	6,023.9	5,998.7	6,099.8	2.0%

Forecast Sales of Breakfast Cereals by Category, Value in US$ millions, 2011-2016

	2011*	2012	2013	2014	2015	2016	CAGR
Hot cereals	1,094.7	1,087.7	1,094.4	1,091.6	1,082.3	1,075.7	-0.3%
RTE cereals	8,926.3	9,044.3	9,156.3	9,232.0	9,283.8	9,306.8	0.8%
Children's breakfast cereals	2,826.5	2,832.4	2,839.5	2,826.7	2,808.3	2,786.4	-0.3%
Family breakfast cereals	6,099.8	6,211.9	6,316.8	6,405.3	6,475.5	6,520.4	1.3%

Sales of Breakfast Cereals by Category, Volume in ’000 tonnes, 2006-2011

	2006	2007	2008	2009	2010	2011*	CAGR
Hot cereals	203.2	200.6	199.3	192.2	189.5	183.5	-2.0%
RTE cereals	1,200.0	1,207.7	1,212.5	1,203.8	1,202.6	1,198.6	0.0%
Children's breakfast cereals	376.3	372.9	369.3	378.5	372.2	370.6	-0.3%
Family breakfast cereals	823.7	834.7	843.2	825.3	830.4	828.0	0.1%

Forecast Sales of Breakfast Cereals by Category, Volume in ’000 tonnes, 2011-2016

	2011*	2012	2013	2014	2015	2016	CAGR
Hot cereals	183.5	180.2	179.4	177.7	175.1	173.6	-1.1%
RTE cereals	1,198.6	1,197.0	1,196.1	1,193.1	1,189.7	1,184.7	-0.2%
Children's breakfast cereals	370.6	367.6	365.1	360.4	355.6	350.2	-1.1%
Family breakfast cereals	828.0	829.3	830.9	832.7	834.1	834.5	0.2%

Source for all: *Euromonitor, September 2011.*
****Note for all:*** *All 2011 data is provisional and based on part-year estimates. At the time of writing this report, this is the most recent data available for this product category. Any small discrepancies in column totals are due to rounding.*

- The value of hot cereal sales declined from US$1.16 billion in 2006 to US$1.09 billion in 2011 (-1.1% CAGR), and sales are forecast to fall to US$1.08 billion by 2016. Volume sales also declined over this period (-2.0% CAGR), and are expected to continue doing so, with a forecast CAGR of -1.1% between 2011 and 2016.

- Overall, ready-to-eat cereals grew from US$8.27 billion in 2006 to US$8.93 billion in 2011 (1.5% CAGR), and are forecast to continue growing at a slower rate from 2011 to 2016 (0.8% CAGR). However, volume sales decreased slightly from 2006 to 2011, and are expected to continue this downward trend, with a forecast CAGR of -0.2% from 2011 to 2016.

TOP INGREDIENTS AND FLAVOUR COMPONENTS, 2012

Top Grain Ingredients in Cereals January-October 2012	Number of Products
Oats	123
Wheat	116
Corn	92
Bran	75
Barley	48
Rice	45
Malt	34
Quinoa	8
Millet	4
Rye	4

Source: *Mintel, 2012.*

Top Fruit and Nut Ingredients in Cereals January-October 2012	Number of Products
Almond	32
Raisins	31
Coconut	13
Cranberry	12
Apple	12
Sunflower seed	11
Pecan nut	10
Linseed	9
Pumpkin seed	9
Blueberry	9

Source: *Mintel, 2012.*

Top Flavour Components in Cereals January-October 2012	Number of Products
Almond	25
Honey	20
Cinnamon	18
Raisin	18
Fruit	14
Nut	14
Chocolate (unspecified)	12
Pecan	12
Marshmallow	11
Cranberry	10
Apple	9
Blueberry	8
Vanilla/vanilla bourbon/ vanilla madagascar	8
Banana	5
Berry	5
Cocoa	5
Raspberry	5

Source: *Mintel, 2012.*

Canadian Snacks for Space

Hapi Foods' Holy Crap Cereal was one of the 12 winners of the Canadian Space Agency's "Canadian Snacks for Space" contest. As a result, Holy Crap was named one of 12 Canadian foods to accompany Canadian Astronaut and Mission 35 Commander Chris Hadfield into space in December 2012 (Canada Space Agency; Canada Newswire).

Source: *Mintel, 2012.*

CONCLUSION

The use of "all natural product" claims on new cold breakfast cereal products has fluctuated since 2007, but has remained relatively steady as a percentage of product introductions. The use of "organic" claims, however, has declined by approximately one-third over the same time period, which may be attributable to organic certification standards in the United States (Mintel, 2012). Between 2007 and October 2012, 263 cold cereal products were launched in the U.S. with an "organic" claim, just 77 of which were USDA Certified organic. Companies that successfully complete the rigorous organic certification processes and label their products accordingly, may find favour among the increasingly discerning consumers in this market.

Growth of "gluten-free" and "GMO-free" cereals, as in the overall packaged food market, indicates a growing interest and consumption of such products, whether it is the result of a physical dietary necessity or the belief that it is a healthier option. Claims such as "wholegrain" and "kosher" also remain particularly popular amongst natural and organic cereals.

While breakfast cereal is top of mind among breakfast eaters, this is a mature market where manufacturers are under continuous pressure to develop new and innovative products in the face of competition from other popular breakfast options for in-home consumption or quick-service restaurants. Convenience or ease of preparation play a major role in the breakfast decisions of time-pressed consumers. Consumption at other times of the day or the development of other uses of the cereal, for example as an ingredient in other foods may also help to grow sales (Mintel, February 2012).

Source: *Planet Retail Ltd.*

KEY RESOURCES

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