

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"With the majority of Irish consumers associating cereal bars and breakfast biscuits with being high in sugar, brands should reformulate products to build on consumers' appetite for a healthier alternative to traditional snacking options." – Sophie Dorbie, Research Analyst

This report looks at the following areas:

- What are the key occasions for consumption of cereal bars and breakfast biscuits?
- How can brands improve the health credentials of bars and biscuits?
- What NPD opportunities exist for the category?

The cereal bar and breakfast biscuit market has experienced steady growth in Ireland between 2009 and 2014. Despite cereal bars dominating the market in terms of value sales, the breakfast biscuit category has driven this growth through its penetration of the market followingstrong NPD.

The continuing demand for on-the-go options fuelled by consumers' busy lifestyles will keep the market buoyant in the years to come.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

	ntroduction	
	Key themes of the report	
	Definition	
	Market size	
	Consumer research	
	Data sources	
	Abbreviations	
E	xecutive Summary	

The market

Figure 1: Estimated value of the cereal bars and breakfast biscuits market, by segment, IoI, 2013

Forecast

Figure 2: Indexed value growth of the cereal bar/breakfast biscuit market, NI and RoI, 2009-19

Market factors

Changing demographics

Spotlight on sugar

On-the-go fuelling the market

Innovations

The consumer

Three quarters buy cereal bars/breakfast biscuits

Figure 3: Cereal bars/breakfast biscuits purchased in the last six months by age group, NI and RoI, August 2014

Belvita most popular brand

Figure 4: Cereal bars/breakfast biscuit brands purchased in the last six months by age group, NI and RoI, August 2014

Bars and biscuits tapping into the treat-time market

Figure 5: Occasions for eating cereal bars and breakfast biscuits, NI and RoI, August 2014

Figure 6: Agreement with statements relating to cereal bars and breakfast biscuits, NI, August 2014

Figure 7: Agreement with statements relating to cereal bars and breakfast biscuits, RoI, August 2014

What we think

Issues and Insights

What are the key occasions for consumption of cereal bars and breakfast biscuits?

The facts

The implications

How can brands improve the health credentials of bars and biscuits?

The facts

The implications

What NPD opportunities exist for the category?

The facts

BUY THIS REPORT NOW

VI SI T: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications **Trend Applications** Transumers Help Me Help Myself FSTR HYPR Market Overview Key points Changing demographics need to be catered for Baby boom presents new opportunities Figure 8: Number of live births per year, NI and RoI, 2002-12 Healthy options needed for the lunchbox market Figure 9: Agreement with statements relating to children's eating habits, NI and RoI, January 2014 On-the-go market being fuelled by long working hours Figure 10: Consumers who work long hours, by frequency of doing so, NI and RoI, July 2013 Spotlight on sugar Irish consumers keen to see a sugar reduction in snack bars Figure 11: Agreement with statements relating to cereal bars/breakfast biscuits, NI and RoI, August 2014 Market Size and Forecast Kev points Steady growth in bar/biscuit market Figure 12: Estimated value of the cereal bars and breakfast biscuits market, NI and RoI, 2009-19 Growth in RoI market expected to outpace NI Figure 13: Indexed growth of the cereal bars and breakfast biscuits market, NI and RoI, 2009-19 Cereal/granola bars dominating the market Figure 14: Estimated value of the cereal bars and breakfast biscuits market, by segment, IoI, 2013 Strengths and Weaknesses Strengths Weaknesses **Competitive Context**

Key facts

Porridge, cereal and muesli are the most popular types of breakfast in IoI

Figure 15: Types of breakfast cereals eaten in the last six months, NI and RoI, February 2013

IoI cereal market worth €279.3 million in 2012

Figure 16: Estimated retail sales of hot and cold cereal, by value, IoI, NI and RoI, 2008-18

Who's Innovating?

Key points

Chocolate leading new flavour launches

BUY THIS REPORT NOW

VI SI T: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 17: Top 10 flavour components in new cereal, energy and snack bars, UK and Ireland, 2012 and 2013

Chocolate being used alongside health and indulgence claims Format innovation moving away from bars Popcorn inspiring NPD activity Superfoods boosting health credentials of bars Protein offering lasting energy claims Nutri-grain providing a first for the category Private label investing in breakfast biscuit category

Extra crunch for slow energy release

Companies and Brands

Eat Natural Key facts Brands and products Brand NPD Recent developments Kellogg's Key facts Brands and products Brand NPD Recent developments Mondelēz International Key facts Brands and products Brand NPD Recent developments Natural Balance Foods (Nākd) Key facts Brands and products Brand NPD Recent developments Nature Valley Key facts Brands and products Brand NPD Recent developments Tracker Key facts Brands and products Recent developments

BUY THISVISIT: store.mintel.com
CALL: EMEA +44 (0) 20REPORT NOWAmericas +1 (312) 943 5
EMAIL: reports@mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

United Biscuits Key facts Brands and products Brand NPD Recent developments Weetabix Key facts Brands and products Brand NPD Recent developments

The Consumer – Usage of Cereal Bars and Breakfast Biscuits by Type

Key points

Three quarters buy cereal bars/breakfast biscuits

Figure 18: Cereal bars and breakfast biscuits purchased in the last six months, NI and RoI, August 2014

Eight in 10 under-45s eating bars/biscuits

Figure 19: Usage of cereal bars/breakfast biscuits in the last six months, by age, NI and RoI, August 2014

Category has strong appeal amongst women and ABC1 consumers

Figure 20: Usage of cereal bars/breakfast biscuits in the last six months, by gender and social status, NI and RoI, August 2014

Bars/biscuits a favourite amongst families with children

Figure 21: Cereal bars and breakfast biscuits purchased in the last six months, by presence of children in household, NI and RoI, August 2014

The Consumer – Usage of Cereal Bars and Breakfast Biscuits by Occasion

Key points

Cereal bars and breakfast biscuits appealing to the snack society

Figure 22: Occasions for eating cereal bars and breakfast biscuits, NI and RoI, August 2014

Category popular for breakfast on the go

Potential for brands to tap into the treat time market

Figure 23: Occasions for eating cereal bars/breakfast biscuits, by gender, NI and RoI, August 2014

Under-25s seeking an energy boost from bars and biscuits

Figure 24: Consumers who eat cereal bars/breakfast biscuits 'When I need an energy boost', by age, NI and RoI, August 2014

The Consumer – Attitudes towards Cereal Bars and Breakfast Biscuits

Key points

Category deemed to be too high in sugar

Figure 25: Agreement with statements relating to cereal bars and breakfast biscuits, NI, August 2014

Figure 26: Agreement with statements relating to cereal bars and breakfast biscuits, RoI, August 2014

Women and ABC1 consumers wary of sugar content

Opportunities for value-added NPD

Protein positioning for post-exercise and filling snacking

Figure 27: Agreement with the statement 'I would like to see more bars/biscuits that are high in protein', by gender, NI and RoI, August 2014

BUY THIS REPORT NOW

VI SI T: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 28: Snack/cereal/energy bars launched featuring high in protein claims, NI and RoI, 2013

Over a third not satisfied by bars and biscuits

Figure 29: Agreement with the statement 'I do not find cereal/snack/energy bars and breakfast biscuits filling enough', NI and RoI, August 2014

Men opting for bars/biscuits as a guilt-free treat

Figure 30: Agreement with the statement 'Cereal/snack/energy bars and breakfast biscuits make for a good guilt-free treat', by gender, NI and RoI, August 2014

Appendix

NI Toluna tables

Figure 31: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, NI, August 2014 Figure 32: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, NI, August 2014 (continued) Figure 33: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, NI, August 2014 (continued) Figure 34: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, NI, August 2014 (continued) Figure 35: Types of cereal bars, energy bars and breakfast biscuits eaten in the last six months, by demographics, NI, August 2014 Figure 36: Types of cereal bars, energy bars and breakfast biscuits eaten in the last six months, by demographics, NI, August 2014 (continued) Figure 37: Types of cereal bars, energy bars and breakfast biscuits eaten in the last six months, by demographics, NI, August 2014 (continued) (continued) Figure 39: Occasions in the last six months that consumers have eaten cereal, snack or energy bars or breakfast biscuits, by demographics, NI, August 2014 Figure 40: Occasions in the last six months that consumers have eaten cereal, snack or energy bars or breakfast biscuits, by demographics, NI, August 2014 (continued) Figure 41: Occasions in the last six months that consumers have eaten cereal, snack or energy bars or breakfast biscuits, by demographics, NI, August 2014 (continued) Figure 42: Agreement with the statement 'Cereal/snack/energy bars and breakfast biscuits make for a good guilt-free treat', by demographics, NI, August 2014 Figure 43: Agreement with the statement 'I trust the health claims of cereal/snack/energy bars and breakfast biscuits', by Figure 43: Agreement with the statement 'I would like to see a wider range of bars/biscuits with added health benefits (eg high fibre, contributing to my five-a-day)', by demographics, NI, August 2014 Figure 45: Agreement with the statement 'I would like to see more bars and biscuits with reduced/low sugar', by demographics, NI, August 2014 August 2014 August 2014 Figure 46: Agreement with the statement 'Cereal/snack/energy bars and breakfast biscuits provide a nourishing start to the day', by demographics, NI, August 2014 Figure 47: Agreement with the statement 'I do not find cereal/snack/energy bars and breakfast biscuits filling enough', by demographics, NI, August 2014 Figure 48: Agreement with the statement 'Own-label cereal/snack/energy bars and breakfast biscuits are just as good as branded varieties', by demographics, NI, August 2014 Figure 49: Agreement with the statement 'Cereal/snack/energy bars and breakfast biscuits are good value for money', by demographics, NI, August 2014 figure 50: Agreement with the statement 'Bars/biscuits with natural ingredients are worth paying more for', by demographics, NI, August 2014 Figure 51: Agreement with the statement 'I would like to see more bars/biscuits that are high in protein', by demographics, NI, August 2014 Figure 52: Agreement with the statement 'Some bars/biscuits are too high in sugar', by demographics, NI, August 2014 Figure 53: Agreement with the statement 'Some bars/biscuits are too processed', by demographics, NI, August 2014 Figure 54: Agreement with the statement 'I prefer other healthy snacks to cereal/snack/energy bars and breakfast biscuits (eg fresh or dried fruit, nuts)', by demographics, NI, August 2014 RoI Toluna tables Figure 55: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, RoI, August 2014 Figure 56: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, RoI, August 2014 (continued) Figure 57: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, RoI, August 2014 (continued) Figure 58: Types of cereal bars, energy bars and breakfast biscuits bought in the last six months, by demographics, RoI, August 2014 (continued) Figure 59: Types of cereal bars, energy bars and breakfast biscuits eaten in the last six months, by demographics, RoI, August 2014 Figure 60: Types of cereal bars, energy bars and breakfast biscuits eaten in the last six months, by demographics, RoI, August 2014

(continued) Figure 61: Types of cereal bars, energy bars and breakfast biscuits eaten in the last six months, by demographics, RoI, August 2014 (continued)

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 62: Types of cereal bars, energy bars and breakfast biscuits eaten in the last six months, by demographics, RoI, August 2014 (continued) Figure 63: Occasions in the last six months that consumers have eaten cereal, snack or energy bars or breakfast biscuits, by demographics, RoI, August 2014 Figure 64: Occasions in the last six months that consumers have eaten cereal, snack or energy bars or breakfast biscuits, by demographics, RoI, August 2014 (continued) Figure 65: Occasions in the last six months that consumers have eaten cereal, snack or energy bars or breakfast biscuits, by demographics, RoI, August 2014 (continued) Figure 66: Agreement with the statement 'Cereal/snack/energy bars and breakfast biscuits make for a good guilt-free treat', by demographics, RoI, August 2014 Figure 67: Agreement with the statement 'I trust the health claims of cereal/snack/energy bars and breakfast biscuits', by Genographics, RoI, August 2014 Figure 68: Agreement with the statement 'I would like to see a wider range of bars/biscuits with added health benefits (eg high fibre, contributing to my five-a-day)', by demographics, RoI, August 2014 Figure 69: Agreement with the statement 'I would like to see more bars and biscuits with reduced/low sugar', by demographics, RoI, August 2014 Figure 70: Agreement with the statement 'Cereal/snack/energy bars and breakfast biscuits provide a nourishing start to the day', by demographics, RoI, August 2014 Figure 71: Agreement with the statement 'I do not find cereal/snack/energy bars and breakfast biscuits filling enough', by demographics, RoI, August 2014 Figure 72: Agreement with the statement 'Own-label cereal/snack/energy bars and breakfast biscuits are just as good as branded varieties', by demographics, RoI, August 2014 Figure 73: Agreement with the statement 'Cereal/snack/energy bars and breakfast biscuits are good value for money', by demographics, RoI, August 2014 Figure 74: Agreement with the statement 'Bars/biscuits with natural ingredients are worth paying more for', by demographics, RoI, August 2014 Figure 75: Agreement with the statement 'I would like to see more bars/biscuits that are high in protein', by demographics, RoI, Figure 76: Agreement with the statement 'Some bars/biscuits are too high in sugar', by demographics, RoI, August 2014 Figure 77: Agreement with the statement 'Some bars/ biscuits are too processed', by demographics, RoI, August 2014

Figure 78: Agreement with the statement 'I prefer other healthy snacks to cereal/snack/energy bars and breakfast biscuits (eg fresh or dried fruit, nuts)', by demographics, RoI, August 2014

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100 EMALL: reports@mintel.com