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# A Descriptive Study of the Australian Breakfast Cereal Market

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## Abstract

*The purpose of this study is to present an overview of the Australian breakfast cereal market and to focus on different important areas of marketing system as well as the pivotal consumer behaviour in this particular segment of the market. This study is descriptive in nature that covers the areas of supply conditions, demand conditions, nature of the marketing strategies and the future state of the breakfast cereal market. Data were gathered using mall intercepts at three large retail stores in Australia. The result revealed that Kellogg's is the market leader in Australian breakfast cereals followed by Sanitarium and Uncle Toby's. Breakfast cereal demand is influenced by company and product brands, brand loyalty, recommendations from others, financial risk, the consumer's ethnicity and food, health and consumer organisations. The branding strategy of the majority of cereal manufacturers combines individual brand names with family names. The market leaders are aggressively competing against each other, and attempts are made to cover all areas of the cereal market including children's cereal, healthy cereals and other types of cereals. External food, health and consumer organizations influence the demand for breakfast cereals in Australia. The breakfast cereal market in Australia is one that is fiercely competitive in nature. The Kellogg's name has become synonymous with cereals.*

**Keywords :** Brand, Positioning, Product, Breakfast cereal, Australia.

## Introduction

Cereals have long dominated breakfast tables all over the world. Australia is no exception to this. This paper looks at the nature of this industry from a Marketing viewpoint. Kellogg's has been a dominant brand in this particular industry and has set the benchmark for other brands to follow. Other bands such as Sanitarium and Uncle Toby have made significant strides in achieving brand awareness and loyalty amongst various consumer groups.

The paper aims to give a holistic perspective of the Australian cereal market. Supply conditions, demand conditions, and consumers' ever changing tastes and preferences have been highlighted in the paper.

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# Supply Conditions

## Direct/Indirect competitors

The following companies all participate in the Australian cereal market (Table 1). All the companies vary in size and supply products in one segment or many segments of the cereal market, depending on the size of the company.

**Table 1. Companies in Australian Cereal Market.**

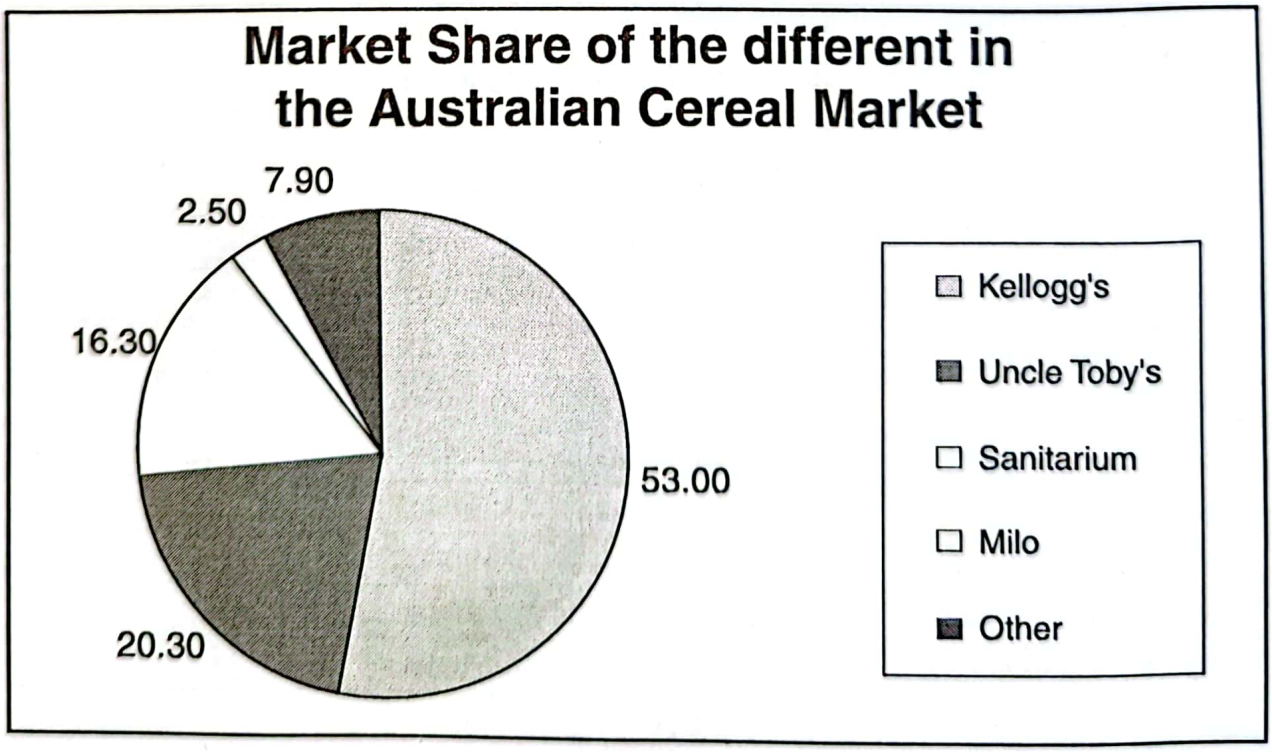
| | Company Name | Type | Location |
|---|---|---|---|
| 1. | Kellogg's | Direct Competitor | Based in America. Currently situated in 15 countries and sells products in 160 countries. |
| 2. | Sanitarium | Direct Competitor | 100 % Australian owned, located in various parts of Australia. |
| 3. | Uncle Toby's (Goldman Fielders) | Direct Competitor | Based in America. Currently situated in 15 countries and sells products in 160 countries. |
| 4. | Black & Gold - Flemings/Clancys | Direct Competitor | Australia |
| 5. | No Frills-Franklins | Direct Competitor | Australia |
| 6. | Home Brand-Coles | Direct Competitor | Australia |
| 7. | GoldenVale | Direct Competitor | Australia |
| 8. | IGA | Direct Competitor | Australia |
| 9. | Norganic | Direct Competitor | Australia |
| 10. | Goodness | Direct Competitor | Australia |
| 11. | Farmland | Direct Competitor | Australia |
| 12. | Lowan Wholefoods | Direct Competitor | Australia |
| 13. | Vogels | Direct Competitor | Australia |
| 14. | NU-VIT | Direct Competitor | Australia |
| 15. | Dick Smith | Direct Competitor | Australia |
| 16. | Freedom Foods | Direct Competitor | Australia |
| 17. | Weight Watchers | Direct Competitor | Australia |
| 18. | Purina | Direct Competitor | Australia |
| 19. | Nature's Source | Direct Competitor | Australia |
| 20. | Willow Valley | Direct Competitor | Australia |

| | | | |
|---|---|---|---|
| 21. | Pure Harvest | Direct Competitor | Australia |
| 22. | Cerola | Direct Competitor | Australia |
| 23. | Healtheries | Direct Competitor | Australia |
| 24. | Morning Sun | Direct Competitor | Australia |
| 25. | SunSol | Direct Competitor | Australia |
| 26. | Alara Organic | Direct Competitor | Australia |
| 27. | Biogenic Health Food | Direct Competitor | Australia |
| 28. | Meriram Organics | Direct Competitor | Australia |
| 29. | Mellow Yellow | Direct Competitor | Australia |
| 30. | Carman's Muesli | Direct Competitor | Australia |
| 31. | Quakers | Direct Competitor | International |

From the above table, the first 3 companies are large organizations with world wide operation. All the other companies are small organizations that sell limited range of cereal products to specific market segment.

**Concentration or lack of concentration of ownership and trends in supply**

Figure 1. ([1]Jimenez, K, 2004)



As demonstrated in the diagram above, Kellogg's is the market leader in Australian breakfast cereals followed by Uncle Toby's and Sanitarium. These companies make up 89.6% of the market share, leaving 10.4% of the market share to small to medium size companies (1Jimenez, K, 2004).

The trends in the supply market is dictated by the three leading companies, which was displayed in 1995, where Kellogg's released various new brands, followed by Sanitarium, who then released a similar products, then followed by Uncle Toby's. (2Dolahenty, 1997) The market leaders are aggressively competing against each other, and attempts are made to cover all areas of the cereal market including children's cereal, healthy cereals and other types of cereals.

## Market Positions and Strengths and Weakness on Main Competitors

### Kellogg's

Kellogg's is the largest breakfast cereal company within the Australian breakfast cereal market. Kellogg's has a superior advantage of producing large volumes of breakfast cereals, and benefit from the economy of scale, which is a barrier for small competitors. Kellogg's is an international company producing breakfast cereals in 15 countries, and exporting products to 150 countries. Kellogg's has been selling breakfast cereals to consumers for over 100 years, with a large amount of customer loyalty. Kellogg's has embarked in numerous forms of advertising ranging from TV advertisement, through to product promotions, competitions for consumers to win prizes, to promotions where consumers participate in market research (3Grant S, 2001). Kellogg's primary disadvantage is a history of selling a product in one country, resulting in large sales, however in another company, the same product has not resulted in the same amount of sales. They have failed to effectively understand the differences between the international market and the local Australian market. However this has improved dramatically over the years (4Kellogg Website, 2004).

### Sanitarium

Sanitarium is currently the third largest cereal company in the breakfast market. Sanitarium, like Kellogg's, has the advantage of economy of scale, producing large quantities of breakfast cereals for a cheap price per unit. Sanitarium is a 100% owned Australian company and exports their products to over 30 countries. Sanitarium also has an aggressive marketing strategy, utilising the same techniques as Kellogg's. Despite Sanitarium's Weet Bix having 13.3% market share (5Shoebridge (1992, 2003), it is currently trailing behind Kellogg's total market share by approximately 30%. Primarily due to Kellogg's established superior customer awareness program, large product selection for larger customer segmentation leading to greater control of the market compared to Sanitarium (6Sanitarium Website, 2004).

### Uncle Toby's (Goodman Fielders)

Uncle Toby's is currently the second largest cereal company in the breakfast market. The strengths and weaknesses are similar to Sanitarium, and they are facing a lot of the same situations as Sanitarium. (7Uncle Toby's Website, 2004)

### Nature of value creation and delivery

Most of the deliveries of breakfast cereals are conducted using on-road transport, via trucks (logistics channel). Trucks will deliver the breakfast cereals to the business customers who have placed an order resulting in the delivery being sent to the desired location. The cereal companies receive the raw products via rail or on-road transport, convert the raw products to the packaged cereals and deliver it to the customers.
A large majority of the raw products are produced from Australian Farmers, and the production plants are located in Australia (8Heiskanen, 2003). A majority of the key customers of the breakfast cereals are businesses, such as Coles, Woolworth's (9FoodWeek, 2000) and other retail supermarkets and convenience stores. The consumers of the breakfast cereals interface with the supermarkets to purchase the breakfast cereals. The service scape is therefore the supermarkets and the key point of sales for the consumers.

### Government Factors Involved and Their Role

The government involvement is with relation to the regulation of the breakfast market. There are a number of criteria that the breakfast cereal companies must comply with to have the capability of selling their product. For example, there must be nutritional information on the packaging detailing what and how much is in the cereals. There are regulations, enforced by the government, around monopolisation within the market (10Food Australia, 1997), breaches of safety and health laws and price fixing (11McKenzie, 1999).

### Environmental Impacts on Supply

The predominant environmental impact to the supply of Australian breakfast cereals is the farmers who supply the raw goods to the production plants. Environmental impacts to the supply, such as drought, government subsidies or raw material shortages will directly impact on the production of breakfast cereals (12McNamara, 2003). As a result, the companies will not be able to produce the same volumes for the fixed price, and may be forced to import the raw materials from other countries that will incur further financial burdens, and affect the current procedures and processes established with the existing raw material suppliers.

In the past, breakfast cereal companies like Kellogg's have promoted some of their breakfast cereals as "functional foods" whereby as the name suggests performs specific

health function and act in some way to promote health (13Shoebridge, 1992(2)). Government health officials and bodies like the National Food Authority are responsible for drafting legislation to govern this category of food products. Legislation that are written to reduce the breakfast cereal companies' abilities to market products under such category will certainly reduce consumer demand for the products as well as company supply and marketing strategies.

## Demand Conditions

### Trends in Consumer Demand

The Australian breakfast cereal market currently valued at $826 million grew 5.4 per cent in 2003, with adult cereals the biggest segment of the market, followed by family cereals and then children's cereals (see Table 2.). Price increases, volume sales growth, and the drift of consumers to higher-priced cereal brands account for the market growth (14Shoebridge and Evans, 2003). The overall market has followed a growth trend in the past decade. Recent survey figures show the average Australian consumes almost ten large boxes (750g) each (15White, 1998 and Shoebridge, 2003(1)) which has almost doubled compared to the late 1980's (16Shoebridge, 1990). The breakdown of the pattern of sales is a reflection of the consumption pattern and demand for breakfast cereals.

**Table 2. Breakfast Cereal Market October 2003 (Source: 17Shoebridge, 2003(1)).**

| Type of Cereal | Retail Value ($ million) | Percentage Change (%) |
|---|---|---|
| Adult Cereals | 305.0 | + 7.0 |
| Family Cereals | 225.7 | + 2.0 |
| Children's Cereals | 182.3 | + 8.8 |
| Hot Cereals | 54.4 | + 4.5 |
| Portable Cereals | 49.0 | - 0.1 |
| Total | 826.3 | + 5.4 |

### Market Segments and Consumer Demand

The emergence of the health-conscious consumer with interest in diet and nutrition has greatly influenced the demand for the types of breakfast cereals marketed by manufacturers. Marketers of the breakfast cereals capitalized on this health craze and focused sharply on promoting the health benefits of breakfast cereal consumption, for example, low sugar and salt content of their cereals. This also ties in with another

aspect of consumer segmentation, whereby products have been developed to target specifically women, who are seen to demand products containing folic acid, calcium, and iron, for example Kellogg's *'Special K'* (18Hudson,1991; White, 1998; Euromonitor 2004 Global Market Information Database; Shoebridge, 1992(1)).

The maturity of the ready-to-eat (RTE) cereals allows minimum growth opportunities, reflecting the accelerated consumer lifestyle, whereby consumers have little time to sit down and have breakfast and the practice of 'skipping' breakfast. This prompted manufacturers to launch cereal products such as breakfast bars and drinks, for example, Kellogg's *'K-time'* and Sanitarium's *'Up and Go'*. The demand for convenience influenced the K-time distribution with the bars available in 7000 outlets in Sydney alone (19Fox, 1999). Moreover, the expansion of outlets such as coffee shops provide consumers with yet more breakfast options and reducing the demand for RTE cereals (20Euromonitor 2004 Global Market Information Database; White, 1998; Fox, 1999).

Children have long been targeted as a specific group in the Australian breakfast cereal market. It is observed that children are not the final decision maker when going grocery shopping with their parents but have strong influence on the parental purchases from the age of five until about eleven or twelve when they begin to have purchasing power (21Hill, 2002). In accordance with the emergence of the adult health conscious consumer, parents begin raising health concerns for their children. This has somewhat led to the slowdown of the children's breakfast cereal segment. Therefore, many breakfast cereal marketing communications target adults, as well as children combining manufacturer's assurances of taste, quality, health, and nutrition that come appeal to end user (22Hill, 2002; Mitchell and Boustani, 1992). For example, Kellogg's *'Sultana Bran'* uses TV advertising to promote its "healthy and tasty" image for adults as well as children (23Shoebridge, 2003 (2)).

## Environmental Factors Influencing Demand

### Ethnicity

Demand for breakfast cereals around the world is heavily influenced by cultural traditions (24Euromonitor 2004 Global Market Information Database; Siega-Riz and Popkin, 1998). For example, Chinese and Japanese have their traditional breakfasts like rice and soup and breakfast cereals remain new to them. Hence, in a multicultural country like Australia, the type of consumer target group, the amount of consumption, and the types of cereals demanded for breakfast cereals are also influenced by the consumers' ethnic backgrounds.

### Food, Health and Consumer Organizations

External food, health and consumer organizations influence the demand for breakfast cereals in Australia. In recent times, the Australians' Consumer Association (ACA) which publishes the "Choice" magazine have published several articles surveying the

available breakfast cereals on the market and providing survey results, feedback and recommendations on the "health and nutritional" value of each of the products (25Choice website http://www.choice.com.au; White, 1998). This independent analysis has somewhat affected consumers' demand for certain types of breakfast cereals. For example, Sanitarium's *'Weet-Bix'* has been given the nutritional approval by Choice and subsequently increased consumer demand for the product. In contrary, some of Kellogg's children's cereals like *'Nutri-Grain'* have been given the "high sugar content" label, thus will have a negative impact on consumer demand for the product.

## Nature of Marketing Strategy

### Market Positioning and Differentiation

The breakfast cereal market in Australia is one that is fiercely competitive in nature. The different brands in the market have adopted different strategies to lure the customers into purchasing their respective brands. They have done so through "Product Positioning". Customers have been made to perceive that each brand is different from the other that is available.

However, when an informal word association test was conducted most of the respondents came up with the name Kellogg's when asked to name a brand of cereal. The Kellogg's name has become synonymous with cereals. Other brands such as Uncle Toby's, Quaker, and Sanitarium are popular with the consumers.

The brand Kellogg's stands for cereal in the consumer's mind. It is different from other competitors in the sense that it is a global brand, which has been making cereals for a very long time. It is the established global cereal brand.

Uncle Toby's have leveraged the wide range of food products that they have and stressed on the health benefits of their product. Their marketing strategies show that they had attempted to position themselves as an established health food provider.

Quaker is a brand that has gained mass recognition through their highly successful product Quaker Oats. The Quaker brand has a much more conservative approach to cereals, and does not boast of the kind of product portfolio as Kellogg. However, in order to get a larger slice of the market share, Quaker has become much more radical in its approach and has introduced products such as "Dinosaur Eggs", "Quaker Instant Oatmeal Express Baked Apple", and a host of others to its portfolio. In a sense, Quaker is trying to reposition itself form being a manufacturer of simply oatmeal, to a manufacturer of a wide array of cereals that caters to different segments in the market.

Sanitarium is representative of the all-Australian brand. *Weet-Bix*, which is their most famous product, has been ever present in many Australian breakfast tables for a very long time. Although, Sanitarium is better known through *Weet-Bix*, they have also diversified their portfolio and have come up with different variants of breakfast cereals to suit the taste of a wide array of customers. Apart from these major players in the cereal industry, other brands too have made their presence felt. Nestle which is famous

for making powdered milk and other favoured drinks have launched their *Milo* cereal to appeal to the young and sporty segment. Natures Path brings in a series of organic cereals that are uniquely different to other products on the market.

On the other end of the spectrum, there are the generic brands that cater to the more price sensitive or lower income groups. These brands appear as the store brands. Home Brand (Woolworths), Savings (Coles), and No Frill (Franklins) are available in their respective retail outlets. In terms of product positioning, these brands follow the same strategy of cheap price.

## Marketing Channel

It has been observed that like most consumer goods, in order to be successful in Australia, a brand needs to have shelf space in Woolworths, Coles, or both. Thus, the main thrust of the leading cereal brands is to ensure that they are able to sell through these retail outlets.

It appears the major players in the breakfast cereal market all have the capability to directly deliver to their retail customers. Kellogg's have a large warehouse in NSW, with smaller warehouses in Brisbane, Adelaide and Perth. The large warehouse is used for temporary storage prior to being dispatched to smaller warehouses in Brisbane, Adelaide or Perth, or sent direct to interstate customers, or loaded into shipping containers for export to NZ and Asia. The general transportation for short distance is road vehicle while longer distances are rail and sea. Kellogg's works closely with a large logistics company, integrating their information systems to streamline the logistics and warehousing operations (26Kellog website, 2004). Most of the leading cereal brands deliver their products using a similar strategy. The products are stored in large warehouses and are then dispatched to the retail outlets. Some private stores purchase the cereal from the supermarkets and offer it for resale in their stores. In such cases, the cereal brands have little or no control over the mode of distribution. The role of the Internet in terms of distribution of cereal has not gained momentum as of yet. The consumers visit the websites of the different brands of cereal to acquire information about the product, and look out for new products being offered by the companies.

## Key Findings

Based on in depth research of the breakfast cereal market and the material that was made available, the following items were identified as being most relevant to this paper:

- Kellogg's is the market leader in Australian breakfast cereals followed by Sanitarium and Uncle Toby's. These companies make up 89.6% of the market share, leaving 10.4% of the market share to small to medium size companies
- The Australian breakfast cereal market is currently valued at $826 million growing 5.4 per cent in 2003, with adult cereals the biggest segment of the market, followed by

family cereals and then children's cereal. Price increases, volume sales growth, and the drift of consumers to higher-priced cereal brands account for the market growth

- Breakfast cereal demand is influenced by company and product brands, brand loyalty, recommendations from others, financial risk, the consumer's ethnicity and food, health and consumer organisations. Customers will also evaluate their post purchase experience which will influence their next purchase.
- The positioning and differentiation of each product in the market has been done through "product positioning". Customers have been made to perceive that each brand is different from the other that is available. Kellogg's has been found to be the most notable recognised brand.
- The branding strategy of the majority of cereal manufacturers combines individual brand names with family names. The leading brands tend to have similar prices and focus and are differentiating themselves on the basis of taste, and perceived quality.
- The main advertising and promotional channels for breakfast cereals are television, newspaper, radio, magazines and the Internet.
- It has been observed that to be successful in Australia, a brand needs to have shelf space in a major retail outlet such as Woolworths or Coles. Thus, the main thrust of the leading cereal brands is to ensure that they are able to sell through these retail outlets.
- There has been a current social trend to healthy eating which has caused the cereal market to be redesigned and re-branded towards a health conscious society. E.g less sugar content and highlighting healthy components of the cereal e.g high in fibre

## Conclusion

Breakfast cereals have gone through many changes since their first appearance in the market. In addition to merely being viewed as breakfast food, cereals to day are viewed as a major source of nourishment for the human body. With the mindset of the market shifting towards healthier eating, food companies, including cereal manufacturers have had to introduce newer variants to their product mix. Cereals such are Kellogg's Nutri-Grain, Uncle Toby's Vita Brits, are testament to this.

Opportunities in the future will lie in introduction of many more variants of healthy cereal. The market will enjoy addition of different flavours, catering to the different tastes of the customers. Competition will be much more intense. This intense competition among the different brands will definitely be beneficial to the customers. Cereal manufacturers may also decide to reposition themselves from merely being a breakfast food item. Different variants may be introduced to be consumed during different times of the day.

With improvements in the technology and the quality of raw materials, the quality of cereals should also enhance. However, competition will not be restricted to the core product. The augmented level will also come into play. Development of various clubs,

programs (such as the six-week health programme launched by Kellogg's Nutri-Grain), and providing customers with various offers, will play a key role in determining the success of a brand.

New entrants coming in to the market will find it difficult to compete with established brands such as Kellogg's, Uncle Toby's, Sanitarium, etc. unless they are introduced by a large well-known company (such as the Milo cereal launched by Nestle). The big brands will continue to dominate the market. Health regulations and standards will continue to act as an entry barrier.

In addition to competing on the augmented level, cereal manufactures will continue to spend a significant portion of their resources on advertising and promotion. Sponsorship will also play a key role in this regard. Those with greater *share of mind* will ultimately have greater market share.

Recent studies, such as the one conducted by AC Nielsen, have shown that the core brands have become much more aggressive in terms of their marketing strategy. Thus, they have experienced an increase in market share. Lesser-known brands, such as Milo, have experienced a dip in their market share figures. Thus, it may be anticipated that the well-established brands will continue to dominate the market in the foreseeable future ([27]Jimenez, 2004).

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