

# Whole Grain Trends and Consumer Attitudes

Oldways Whole Grains Council 2014



# 5 Key Food Culture Trends

## Demographic shifts

Younger and more diverse eaters want new and global cuisines

## Modern eating

Outsourcing kitchens, ad hoc eating

## Higher quality food experiences

Convergence of healthy, delicious and sustainable through fresh

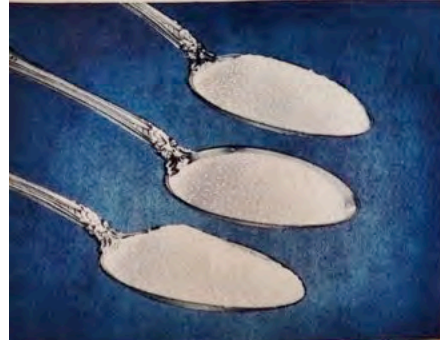
## Impact of digital food life

Food is content

## Health + Wellness goes mainstream

Feeling wellness through good digestion and balanced energy

## Which Is LESS FATTENING?



3 Teaspoons of *Domino* Sugar Contain Fewer Calories than 3 Small Tomatoes!

3 teaspoons of *Domino* Sugar contain fewer calories than  $\frac{1}{2}$  medium grapefruit!

3 teaspoons contain fewer calories than 1 medium apple!

Counting calories" nowadays? You should know that generous amounts of *Domino* Granulated Sugar, used in your favorite foods and beverages, contain fewer calories than usual servings of many foods regularly included in reducing diets.

Dietitians say that *no single* food is fattening unless you take in more calories than your body uses up. Tomatoes, grapefruit and apples are excellent foods . . . but, sugar, too, is nutritionally important in the well-balanced diet you need for good health.

Don't deny yourself the pleasurable *extra flavor* that *Domino* adds to your daily meals. And always insist on *Domino* Pure Cane Sugar because only *one* sugar is *Domino* pure!

Remember...  
Only ONE Sugar is  
*Domino* Pure!



*Domino* GRANULATED—OLD FASHIONED BROWN—LIGHT BROWN—CONFECTIONERS—TABLETS  
America's Largest Selling Sugars



*"These are my  
foods."*



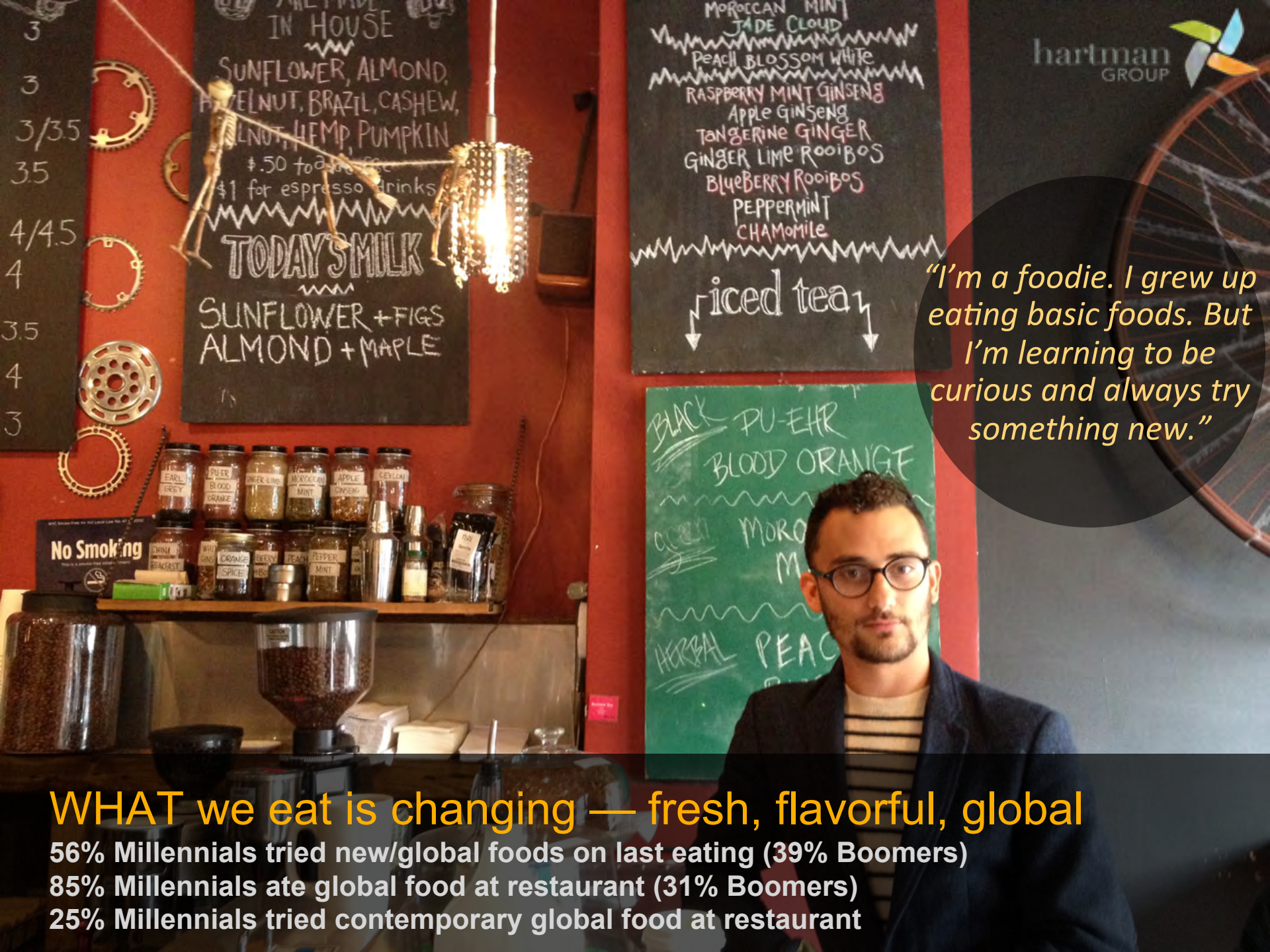
**Traditional American Diet is changing!**  
from iconic, familiar and processed to bold, flavorful and fresh

*"I'm making Peruvian potato soup I learned from my father-in-law."*



## WHO we are is changing — mixed and diverse

- 17% Hispanic (30% by 2050)
- 15% in interracial marriage (6.7% in 1980)
- 13% foreign born (28% from Asia)



IN HOUSE  
SUNFLOWER, ALMOND,  
HAZELNUT, BRAZIL, CASHEW,  
ALMOND, HEMP, PUMPKIN  
\$.50 for espresso drinks  
\$1 for espresso drinks  
TODAY'S MILK  
SUNFLOWER + FIGS  
ALMOND + MAPLE

MOROCCAN MINT  
JADE CLOUD  
PEACH BLOSSOM WHITE  
RASPBERRY MINT GINSENG  
APPLE GINSENG  
TANGERINE GINGER  
GINGER LIME ROOIBOS  
BLUEBERRY ROOIBOS  
PEPPERMINT  
CHAMOMILE  
iced tea

BLACK PU-EHR  
BLOOD ORANGE  
MOROCCAN MINT  
HERBAL PEACH

*"I'm a foodie. I grew up eating basic foods. But I'm learning to be curious and always try something new."*

## WHAT we eat is changing — fresh, flavorful, global

56% Millennials tried new/global foods on last eating (39% Boomers)

85% Millennials ate global food at restaurant (31% Boomers)

25% Millennials tried contemporary global food at restaurant


*"We're a dinner co-op.  
We share the work of  
shopping and cooking,  
and we eat together."*

## WHERE we live is changing — modern family

70% have no children under age 18

27% are single person households (17% in 1970)

19% are married with children (40% in 1970)



*"I enjoying eating  
alone at times  
because I can eat  
how I like."*

## **HOW we eat is changing — new alone**

**47% of eatings are alone**

**43% enjoy eating alone**


**8% prefer it because "sometimes I don't want to share my special treat"**

*"I'm an ad hoc eater...when I'm hungry, I find food."*



**WHEN** we eating is changing — from roadside pantries  
63% decided what to eat within an hour of eating (78% Millennials)



A large group of people is sitting on the edge of a fountain in a city park. In the background, there are several tall, modern skyscrapers. The scene is set during the day, and the atmosphere appears to be a social gathering or festival. A circular graphic overlay is present in the upper left corner, containing a quote.

*"I eat what I want. I'm not limited to mom's cooking or my lack of skills."*

**We are an Eating Culture! Everyone can participate!**  
77% of eating occasions involve some/all prepared foods (88% Millennials)



FOOD WITH INTEGRITY

*"I need food that makes me feel light afterwards so I can function the rest of the day."*



EXTRAORDINARY INGREDIENTS, CRAVEABLE COMBINATIONS

Experience the best of Southeast Asian food in a single bowl. Choose rice, noodles, or salad and add grilled meats, fiery curries, and an abundance of vegetables to create a dish that's spicy, savory, sweet, and tart.

**Restaurant, not the home is the nexus of quality**

**52% didn't want to spend time or energy thinking about cooking**

**46% wanted foods with better flavor**

**42% wanted foods that were made with simple, real ingredients**



## Snacking is a moral right

50% of eatings are snacks (8% did not snack in past 24 hours)

56% of last snacking was motivated by wanting something healthy

54% use foods to prevent overweight

*“I want to make with own hands, do myself, figure things out and share with others.”*



**Consumers are playing with their food**

82% of smartphone users believe technology has improved how well they eat



*"I can get lost at H Mart, but now with my new phone I can look things up and find my way through the maze of new ingredients."*

**Food is a cultural product to be DISCOVERED**

44% use digital resources to discover flavors, ingredients and cuisines

ORGANIC

GLUTEN FREE

NO

REFINED  
SUGARS,  
FLOURS,  
OR OILS

HAND

MADE

LOW

TEMPERATURE  
COOKING

ENZYME

RICH

DAIRY/  
ANIMAL

PRODUCT  
FREE

*"If I eat out a heavy dinner, I'll juice or eat vegan the next day to balance it out."*

**ingredients** organic almond flour, organic almonds, organic oat flour, organic palm sugar, organic coconut oil, organic strawberries, organic agave, organic lemon juice, vanilla bean, organic cinnamon, pink Himalayan salt

**Food is very personal**

45% Millennials tried/adopted a special diet (24% Boomers)

29% Millennials have food allergies/sensitivities (16% Boomers)

Sweet.

11206 · [sweetbyjana.com](http://sweetbyjana.com)



**SUNNY BANG**  
PROBIOTIC  
HOT SAUCE

**PRIVATE LABEL**

**HANDMADE  
IN BROOKLYN**


WWW.SUNNYBANGPRIVATELABEL.COM

8 FL OZ 250 ML

*“Our gut is in disorder because of our over-sanitized, stressed out, sugared up, sedentary lifestyle.”*

**Good digestion is root of wellness**

**33% seek probiotics (+24% since 2007)**



*"I feel better when I'm eating mostly gluten free."*

**Gluten-free reflects the cultural belief that good digestion is the root of all wellness**

- 32% use food to prevent digestive disorders
- 30% bought gluten-free product in past 3 months
- 20% are actively reducing gluten in diet
- 1% are affected by Celiac Disease





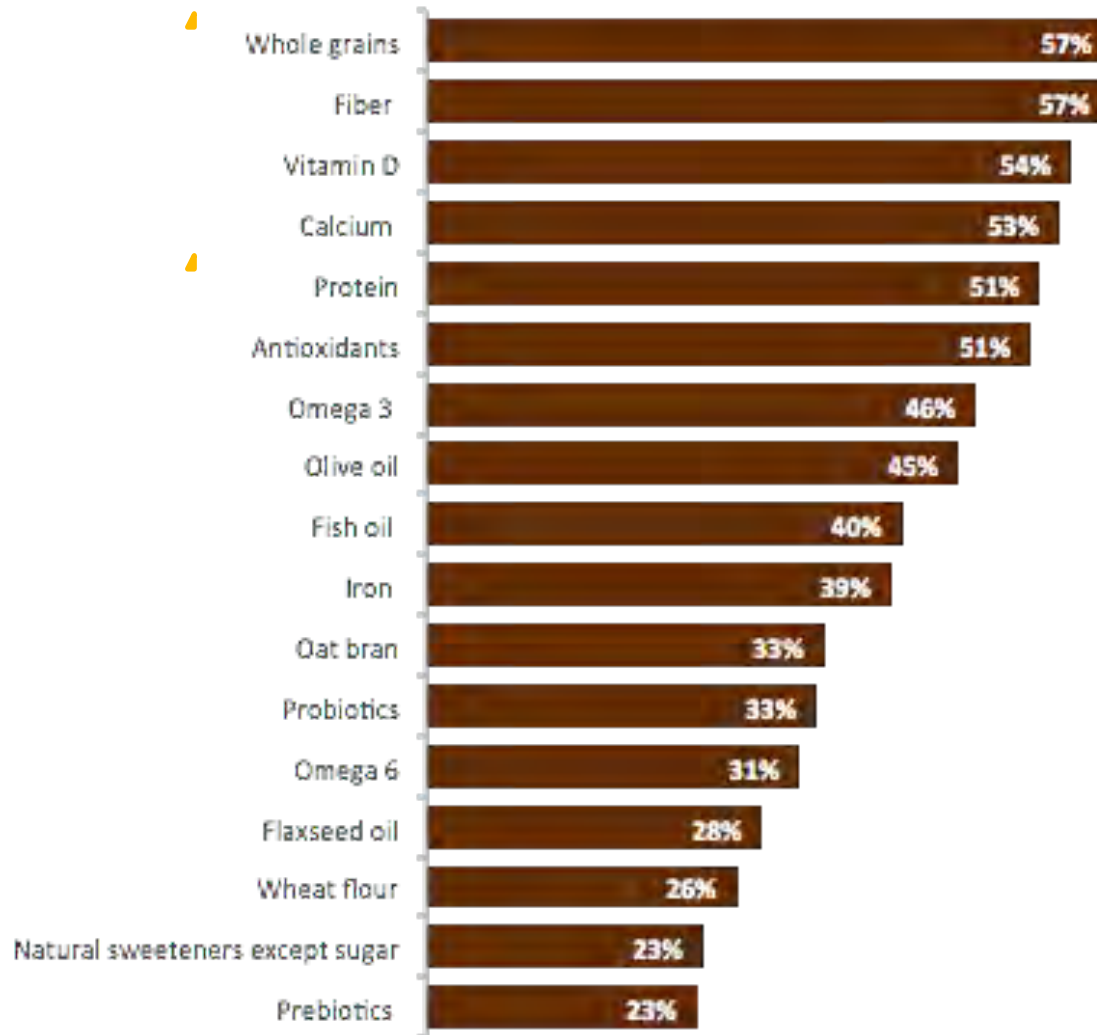
## Wellness is a feeling that is self-assessed

69% went online to learn about H+W (37% asked a doctor)

66% are proactive about health (56% in 2000)

# Consumers choose complex carbs and protein for sustained energy

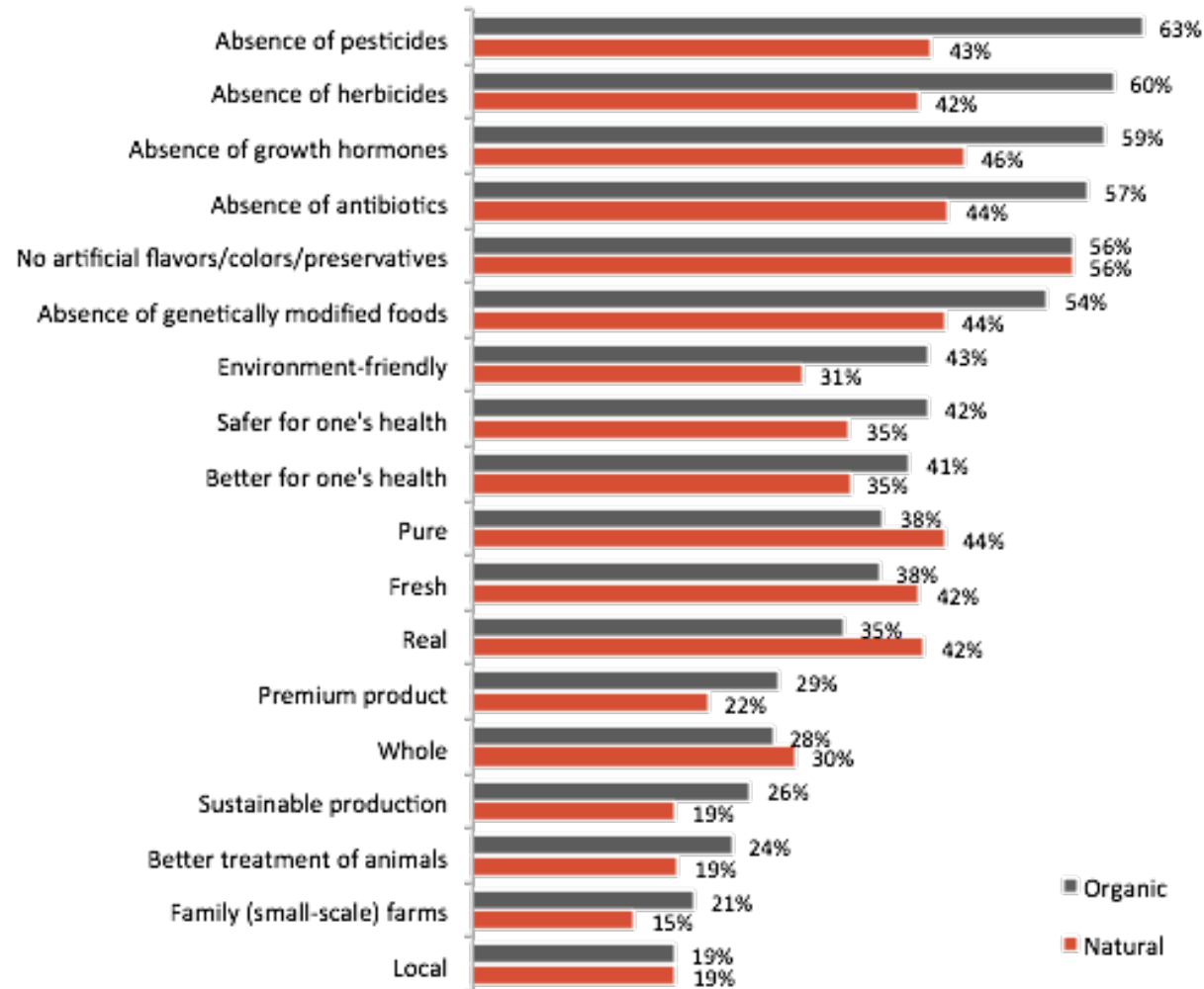
Ingredients Sought by Consumers



V3. Please indicate whether you DELIBERATELY avoid/reduce or add/increase any of the following ingredients or nutrients in your daily diet. Source: Hartman Group Health + Wellness 2013 (n=1,728)

# Organic is absence of negatives

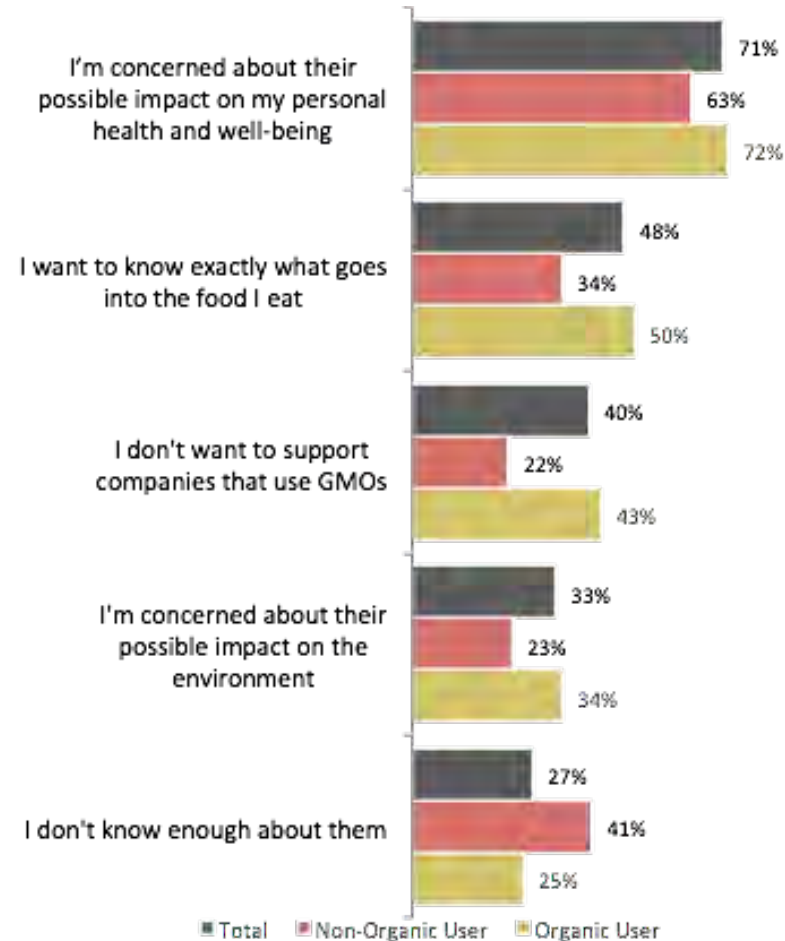
## Natural is real food



Q3. From the following list, what properties do you think are implied or suggested by the term ORGANIC? Q2. From the following list, what properties do you think are implied or suggested by the term NATURAL? Source: Organic and Natural 2014. Base: Organic Users (n=1,278).

# GMOs are not natural

- 40% are avoiding GMOs in daily diet because...

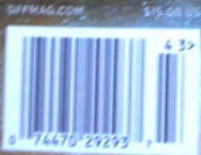


Q28: Please indicate whether you DELIBERATELY avoid/reduce or add/increase any of the following ingredients or nutrients in your daily diet. Q29: Why are you deliberately avoiding or reducing the amount of genetically modified ingredients/GMOs in your daily diet? (Please select all that apply) Base: Organic Users (n=1,278), Non-Users (n=450)

**gff**  
MAGAZINE

**LENA KWAK**  
THE SECRET  
INGREDIENT  
BEHIND  
**THOMAS  
KELLER'S**  
GF FLOUR

Higher quality food experiences



gluten-free forever

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Play food!

# earthfoods café

	small	large	
special	7 <sup>45</sup>	8 <sup>00</sup>	dessert ..... 1.75
today's	4 <sup>00</sup>	5 <sup>00</sup>	yesterday's dessert ..... 2.50
yesterday's	3 <sup>00</sup>	4 <sup>25</sup>	soup ..... 2.00
salad	2 <sup>30</sup>	3 <sup>00</sup>	cider ..... 1.00
rice	1 <sup>25</sup>	1 <sup>50</sup>	tea ..... 1.00
beans	1 <sup>25</sup>	1 <sup>50</sup>	
kale	2 <sup>00</sup>	2 <sup>25</sup>	

**ycmp options**

- 1lg today's + lg. salad + yest. dessert
- 1lg today's + sm. salad + smbzn
- 3sm. yest. + lg. kale + sm rice + dessert + tea
- 1lg. yest. + lg. kale + lg. rice + tea/cider

\*anything that adds up to: 9.50\*

**daily specials:** ←  © Laura Hill Earthpunk

\*Bring your own container, get 50% off!  
#to-go Containers are 50¢



Future of food



## COMMUNITY GRAINS

Helping to create a local grain economy!

We love these small batch pastas made by Bob Klein, owner of Oliveto in Berkeley. All of the grains are grown + milled in California and are delicious, healthy and local. These pastas are "whole grain," - 100% of the germ, bran & endosperm are used.

you'll love these pastas!