

Whole Grain Trends in Contemporary Food Culture

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The Hartman Group



Topic Highlights

- Mindful Sourcing
- Optimal Wellness
- Premium Snacking
- Foodways of Gen Z

The Future of Food: Mindful Sourcing

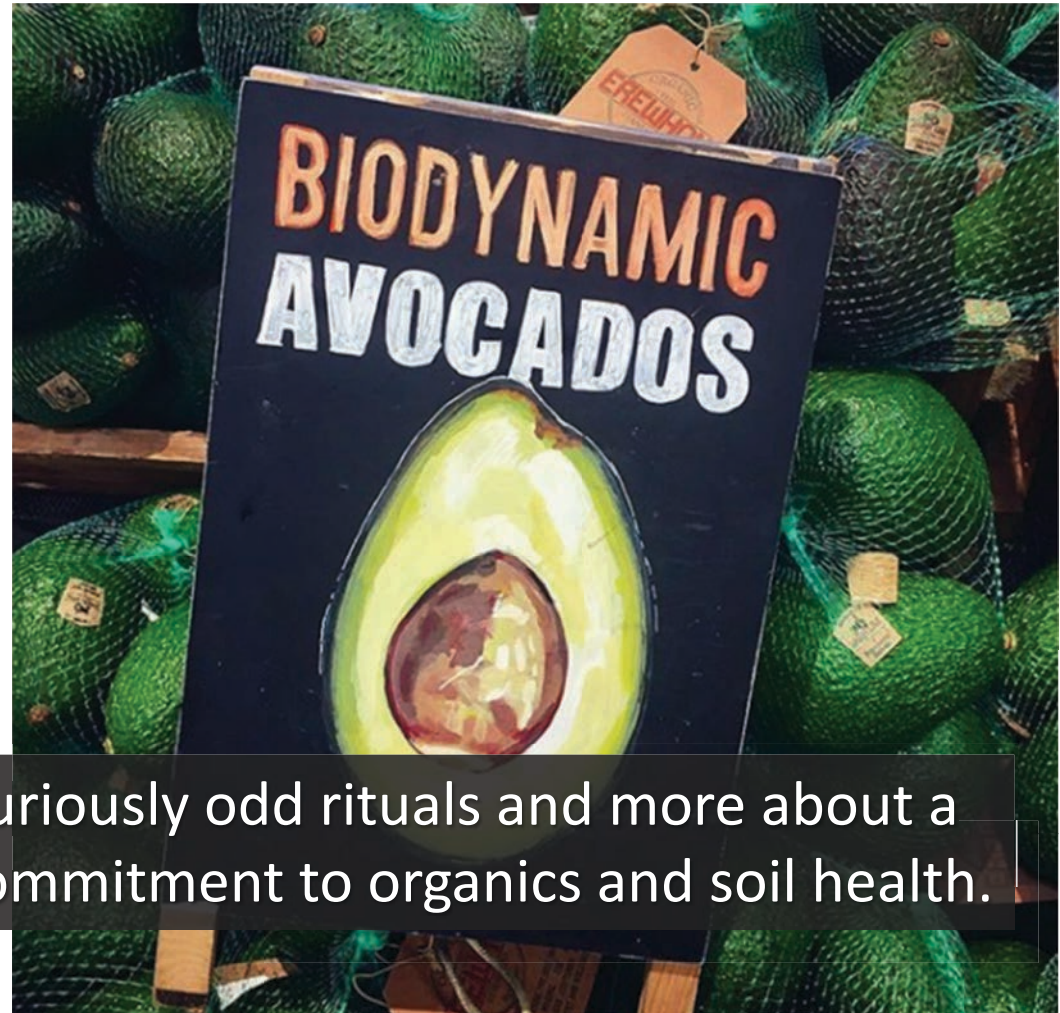
“There is an emerging, exciting passionate group of eaters who don’t want to settle for food that’s processed or food that’s tasteless. And when you pursue great flavor you also pursue great ecology and better nutrition.”

CHEF DAN BARBER
BLUE HILL AT STONE BARNES

MINDFUL SOURCING

The trend toward mindfulness has consumers asking meaningful questions about the origins of their food

The increasingly conscious consumer will continue to catalyze changes in the way that CPG companies and retailers source, produce, package and label their products.



Biodynamics are less about curiously odd rituals and more about a representation of a deeper commitment to organics and soil health.

MINDFUL SOURCING

Farm-driven distinctions are beginning to eclipse ingredient-driven quality cues

Farm-driven messages provide greater transparency and information for the modern consumer... **it's a new era of Show & Tell.**



REBELLION POPCORNERS

We've partnered with **59** family farmers in **Nebraska** to grow a fresh new crop of **NON-GMO CORN** for our PopCorners®, Bean Crisps™ and Crinkles™

100% of our corn can be traced back to the region where it came.

In the next year, we will use more than **20 MILLION** lbs of **NON-GMO CORN** in our snacks.

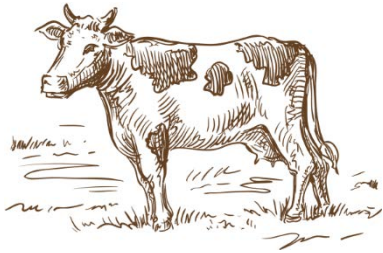
Our **NON-GMO CORN** creates a sustainable business model for **family farmers** that can be passed on from generation to generation

Helping Farmers Transition to Organic...



MINDFUL SOURCING

The progressive consumers' good food philosophy is an anchor in telling your story for the mainstream audience



Sourcing



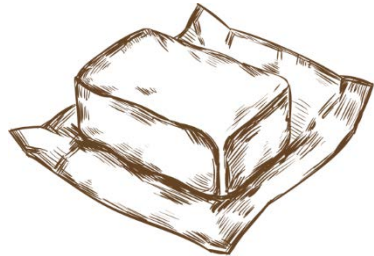
Beyond Organic



Veggies Are Tops



Reconsidering Sweet



Fat Is a Major Food Group



Nose to Tail + Root to Stem



With the Grain



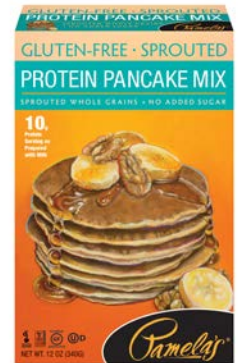
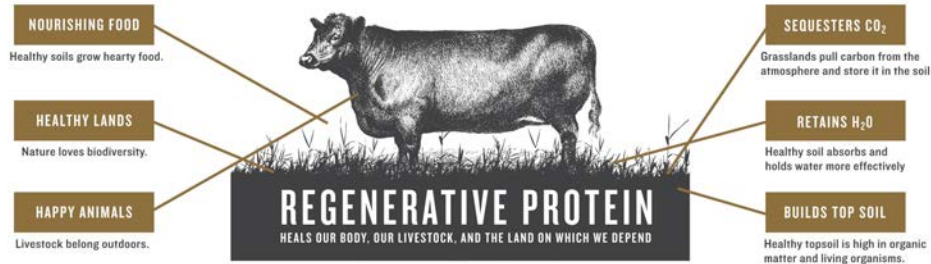
Sound Seafood

MINDFUL SOURCING

Ingredients that restore, rather than deplete, soil health are on the rise with progressive consumers

Regenerative agriculture is a growing movement in which farming practices are used to restore soil degraded by planting and harvesting crops.

One way to regenerate the topsoil is to **graze cattle or bison** on land used for growing crops, and plant drought-tolerant crops, such as **sorghum, kernza, and buckwheat**, which use **less water** than conventional crops.

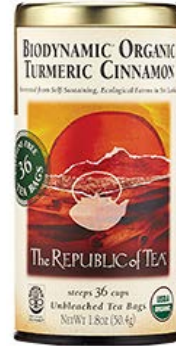


MINDFUL SOURCING

And this requires an interconnected approach to agriculture

The rise of biodynamics for more nutritive soil

CPG



Restaurant

Gracias Madre,
Los Angeles



Income Tax Wine
Bar, Chicago



Farmer Brown,
San Francisco



As consumers deepen their understanding of the connection between **soil quality, food flavor** and **nutrition**, biodynamic presents an opportunity for longer-term slow burn growth.

MINDFUL SOURCING

It's about food narratives that illuminate the growing and harvesting process

Will glyphosate be the next free-from callout?

Progressive consumers believe the widespread use of the herbicide glyphosate may be a possible cause for the recent rise of food intolerances



"I am not a scientist and have a boatload of skepticism when it comes to industry-funded research, but my gut tells me that the glyphosate being sprayed on crops in this country is doing us and the land much harm.

That's why I use only local organic grains we mill in house."

- James Beard award-winning chef, cookbook author and restaurateur Marco Canora

Photo: www.mylastsupper.com/2013/09/marco-canoras-last-supper

MINDFUL SOURCING

Brand Story: Using traceability technology at One Degree, a brand experiencing phenomenal growth

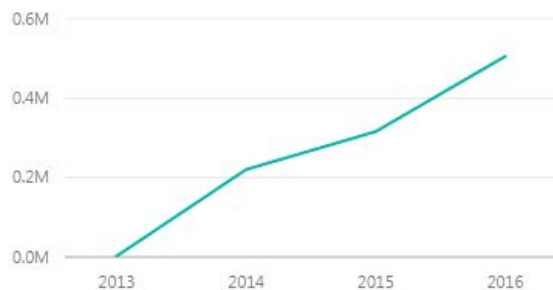
“We know the small family farms that contribute to our products. We know first-hand their dedication to providing pure, healthy food. Our farmers are not mass-market operations, nor are they anonymous.”

Scanning the QR Code from their *Veganic Ancient Whole Grain Bread* will forward the user to a site describing the story behind how the **Rowland Seeds are sourced** and how **Organic Khorasan Wheat** is produced.

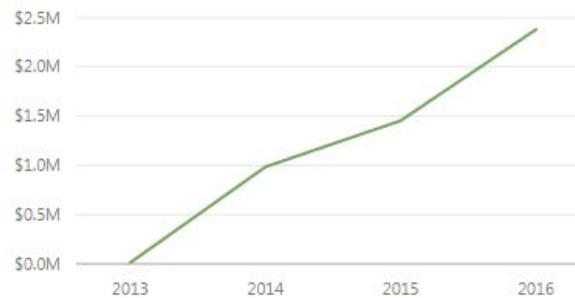


One Degree YoY RTE Cereal Growth

Unit Sales by Year.



Dollar Sales by Year.



507 %

2013 to 2016 Unit CAGR

22236 %

2013 to 2016 Unit Sales % Chg

496 %

2013 to 2016 \$ CAGR

21088 %

2013 to 2016 \$ % Chg

Organic Khorasan Wheat

Rowland Seeds
Taber, AB

Farmer Roy Brevin grows this ancient pure nutritious wheat on his veganic fields in Alberta, Canada. Without chemicals or animal fertilizers, he produces a heart healthy grain rich in fiber and antioxidants.



MINDFUL SOURCING + OPTIMAL WELLNESS

New quality distinctions in grains leverage sustainability and wellness, going deeper into grains' good food story

As consumers continually reexamine the role of grain in their diet, interest in **sustainability** and **wellness** propels them even deeper in to the **world of quality distinctions** and the progressive consumer's good food philosophy.



Beyond Organic

Glyphosate Free

Restoring Nutrition



MINDFUL SOURCING + OPTIMAL WELLNESS

Legacy CPG manufacturers demonstrate commitment to soil health and the health of our microbiomes

With evolving understandings of the importance of soil health in relation to the macro trend of **Digestion** and **Inflammation**, there is potential for the Regenerative Organic Certified label to accelerate more quickly as knowledge around the microbiome and the importance of soil health grows.



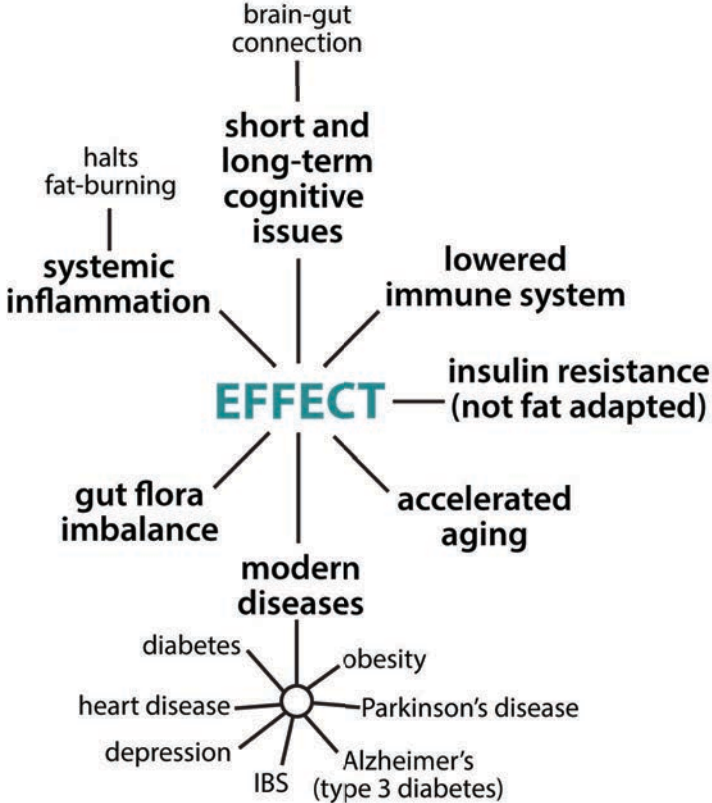
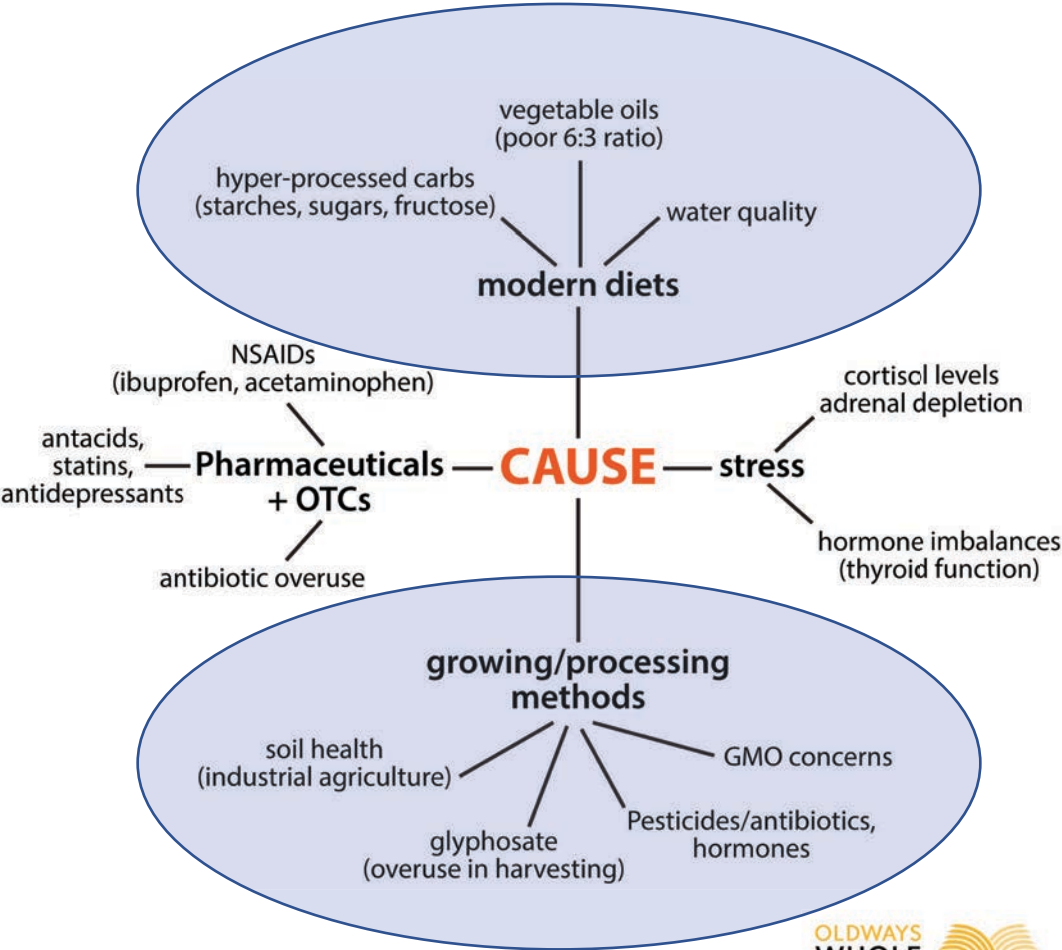
Gerber's new trademarked "Clean Field Farming Practices"

GERBER KNOWS THE FARM
AND FIELD WHERE YOUR
BABY'S FOOD IS GROWN.



OPTIMAL WELLNESS

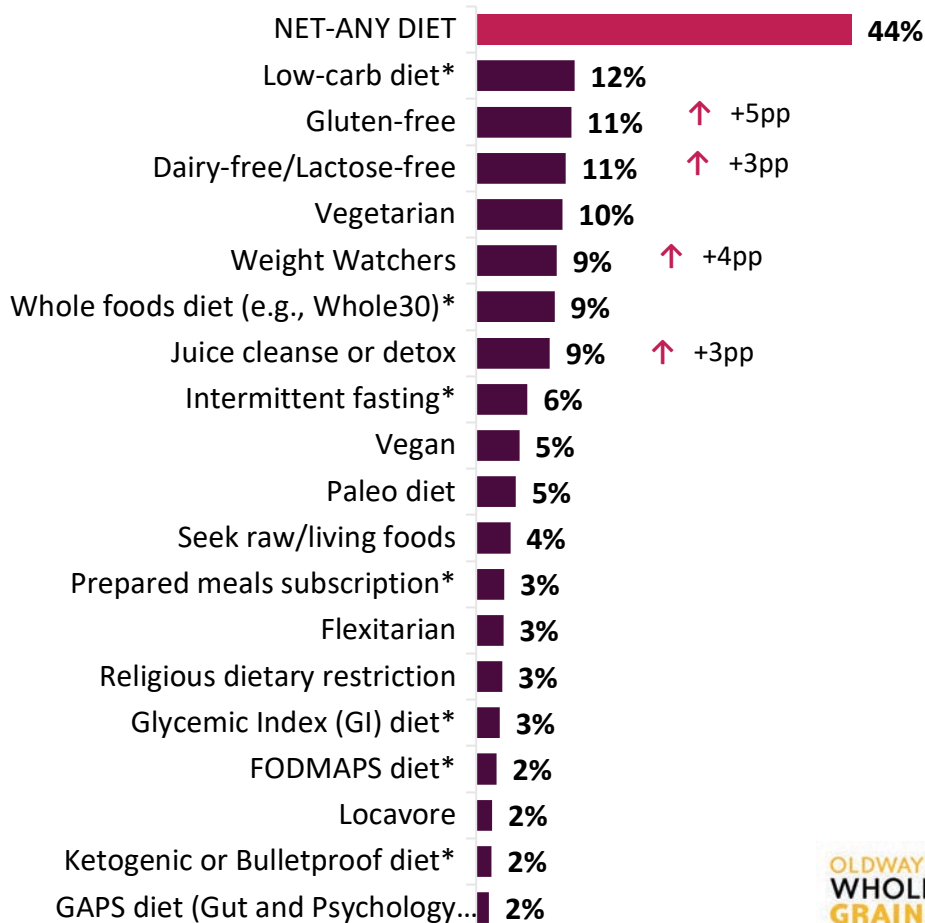
The microbiome and its impact on wellness



OPTIMAL WELLNESS

Dietary approaches reflect interest in avoiding refined carbohydrates and incorporating diversity into their diets

Eating Approaches in Past 12 Months



I try to avoid white carbs and flour and I'm always looking for alternative sources of fiber. Especially with pasta and crackers, I tend to buy the higher-fiber, whole or alternative-grain varieties.

I don't buy bread as often and try to avoid empty calories that can't sustain me. I always look for alternative sources of fiber.
– Gen X Consumer

OPTIMAL WELLNESS

Contemplating grain consumption in modern wellness culture

Interest in less processed and more novel carbohydrates has had significant influence on diet trends over the last 20 years.

Less Engaged

Grains have a broadly constructed association with certain food categories



More Engaged

Identify grains as specific crops and ingredients



Most Engaged

Can articulate more varieties of grains and their wide range of applications, nutrition, flavor, and sourcing



Going with the grain is about reimagining the category

OPTIMAL WELLNESS

Sprouted whole grains are preferred over industrially processed as a way of improving overall health + wellness

The Consumer POV on Sprouting:

- Enhances **digestion** and **nutrient absorption**
- Reduces enzyme inhibitors that can **derail proper digestion**
- “Sprouted” cues **reduced inflammation** in today’s wellness landscape
- Despite the prevalence of grain-avoidance, **consumers do value whole grains as a source of fiber and nutrients.**
- More knowledgeable consumers see **highly processed grains** as the problem, rather than grains themselves.



OPTIMAL WELLNESS

Does the plant-based call-out require further definition?

INGREDIENTS:

Unbleached Pastry Flour, Enriched Unbleached Wheat Flour (Flour, Niacin, Reduced Iron, Thiamine Mononitrate, Riboflavin, Folic Acid), Water, Canola Oil, Corn Starch, Seasoning (Maltodextrin, Yeast Extract, Gum Acacia, Natural Flavor), Palm Oil, Sunflower Lecithin, Salt, Baking Soda, Monocalcium Phosphate, Ammonium Bicarbonate, Sugar, Paprika Oleoresin Color, Yeast Extract, Annatto Extract (Water, Annatto), Lactic Acid, Dehydrated Toasted Onion, Garlic Powder.

Contains Wheat.



PREMIUM SNACKING OCCASIONS

The premiumization of the most basic pantry staple is an indication of the new convenience at play

Appealing to a healthier snacking culture requires innovation that speaks to ingredients and method of processing. The cracker category has up-leveled products with **unique flour alternatives** that go **beyond gluten-free analogues**.

The Maine Crisp Co. Buckwheat, Honey & Blueberries Crisps	Naturally gluten-free organic base
Way Better Snacks Mustard & Cheddar Sprouted Barley Crackers	Sprouted barley and flax optimize nutrients for easy digestion
Jovial Organic Sourdough Einkorn Crackers	Heritage grain einkorn with natural leavening from sourdough.
Grains of Health Laiki Red Rice Crackers	Only three ingredients: whole-grain red rice, sustainably farmed palm oil and sea salt
Mary's Gone Crackers GF Organic Kale Thins	Sprouted base of buckwheat, amaranth, mesquite and sorghum
Blue Star Farms Organic Sprouted Lentil and Ancient Grains Crackers	Organic sprouted lentils, chia seed and ancient whole grains



PREMIUM SNACKING OCCASIONS

Shared vs. Alone Eating: Inside the life of the consumer



Profile:

Michael; 36 y.o.

Married with baby on the way
Seattle, WA

Data Activation/Analytics

Go-to snack:

KIND bar or
LÄRABAR, cereal, or
dinner leftovers

“Junk food is better with friends over, like chocolate covered pretzels. If we’re having football parties on a weekend, I’ll most likely eat it. But I would never go to the store to get something like that just for snacking on my own.”

“I work at home so I nibble throughout the day on things like a KIND bar, an apple. I just grab a little bite to keep me going and keep working.”

PREMIUM SNACKING OCCASIONS

Importance of Kids' Snacking: Inside the life of the consumer



Profile:

Robert; 37 y.o.
Married with three kids
ages 17, 9 and 2
Teaneck, NJ
Police Officer

Kids' go-to snack:

Crackers, cereal, or fruit

Robert's go-to snack:

Granola bar, soup, chips,
and guacamole

"My kids come home really hungry from school and eat a bowl of cereal while waiting for dinner. They're supposed to be leaning away from sugar, but they don't! They like cereal or grapes and bananas."

"When my daughter got onto safety patrol at school, we went to go get ice cream. We don't eat it too often except for birthdays or special occasions."

GEN Z's APPROACH TO FOOD

Motivations for cooking vary – and range from fun to necessity

I have a lot of Instagram accounts I follow for cooking inspiration. If I like it, then I bookmark it.

Female, 16

I started cooking with my mom as her mini chef when I was around 9 years old. She taught me how to make eggs and pasta and rice and many simple things.

Male, 15

I don't like to cook that much. I just know I should. But I do cook a lot because my family all has different schedules, so we don't eat together.

Female, 17



GEN Z's APPROACH TO FOOD

More exposure to food media likely means a more adventurous palate...eventually

My parents and I are super into watching the “Chopped” challenges on the Food Network. Sometimes we’ll do one at home, like my dad will say, “Oh, we have to use this from the freezer, you have to use this leftover, and you have to use this,” when we make dinner. He’s really good at it, too.

Searches her bookmarks in the Tasty app when she **wants to try something new**

LM likes to watch Tasty’s cooking videos when she’s **winding down**

Loves pancakes. On a mission to find the **best pancake mix.**

Family watches food programs together – Chopped, Masterchef

Mom is the workaday cook, but Dad is the “chef,” cooking fancier meals as a hobby. Both **engage LM as sous chef.**

Friend had a **Chopped-themed birthday party; LM won!**



GEN Z's APPROACH TO FOOD

Aside from a preference for a few select, iconic food brands, Gen Z are relatively food brand agnostic

In keeping with both their values and sense of value, Gen Z **look beyond brand name** to determine product quality.

- They look to flavor, nutrition and ingredient panels, and price to assess whether or not a brand name product is actually better.
- Many have also grown up with Trader Joe's, Kirkland, 365, and Kroger's Simple Truth – all beloved store brands – so while they equate store brands with being less expensive, that **doesn't also mean lower quality.**



I actually prefer store brands because they're cheaper. There are only a few products that I think the real kind is the good kind. And those aren't even things I usually get. We don't buy Oreos often, but when we do, I insist on the regular, actual Oreos because the other kinds are just dry.

Male, 18



GEN Z's APPROACH TO FOOD

Gen Z's reliance on their phones for nearly everything affects how they search for food entertainment and instruction



How do you want your information?



Video



Text

Where do you go when...?

You're in the mood to try something new

BuzzFeed, Tasty, Delish
(all available through apps, YouTube channels, or browser)

Recipe sites (e.g., Allrecipes)

Cookbooks

You need advice or some extra help

YouTube

Google

You want to be inspired?

Instagram, YouTube channels, Tasty

TV, Magazines/newspapers,
Cookbooks



Thought starters

- **Mindful Sourcing**

- New quality distinctions in grains leverage sustainability and wellness, going deeper into grains' good food story

- **Optimal Wellness**

- Modern ways of eating, reflect a desire to improve digestion and reduce systemic inflammation

- **Premium Snacking**

- Appealing to a healthier snacking culture requires innovation that speaks to ingredients and method of processing

- **Foodways of Gen Z**

- As digital natives, Gen Z see food as entertainment and nourishment. They look beyond brand name to determine product quality.

Thank you!

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