

# MAKE HALF YOUR GRAINS WHOLE CONFERENCE

*April 20-22, 2009, Alexandria, VA*

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## ARE WE THERE YET? MEASURING PROGRESS ON MAKING AT LEAST HALF OUR GRAINS WHOLE

The 2005 Dietary Guidelines for Americans call for everyone to make at least half their grains whole. Achieving this is difficult, however, until our food environment actively reflects this goal. With this in mind, the Whole Grains Council set out to measure progress, surveying leading magazines to assess whether half the grains in articles, recipes and photos are whole; surveying a typical supermarket to see if half the grain products are whole; and even checking out chain restaurants for progress in offering whole grains.

In this section we'll share new, hitherto unpublished data on whole grain consumption from NPD Group, then detail the results of our assessments of whole grains in the American food environment.

**Whole Grain Consumption** – New Data from NPD Group

**Whole Grains in Magazines** – Who's doing the best job covering whole grains?

**Whole Grains in Supermarkets**

- Whole grain products vs. refined grain products
- Price differences between whole and refined grain products

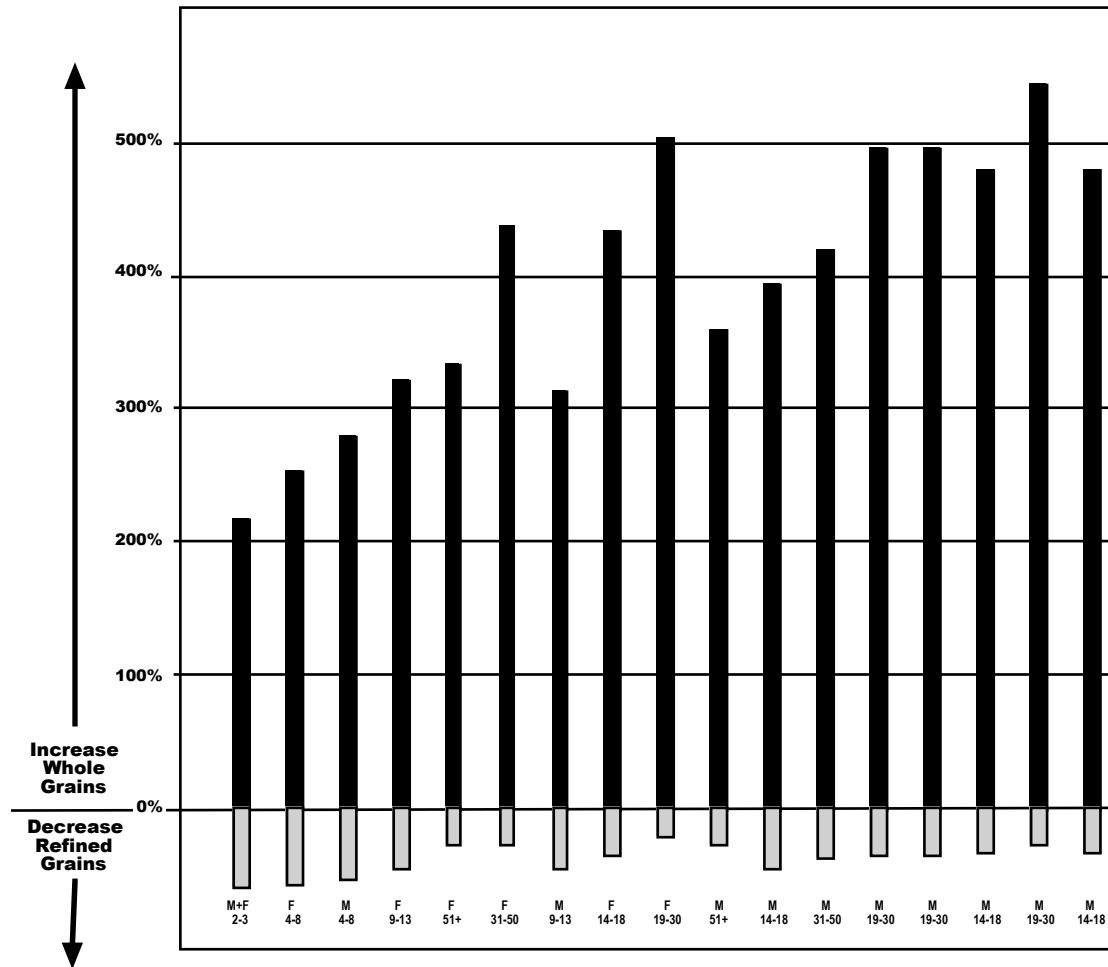
**Whole Grains in Chain Restaurants** – Who offers at least one choice daily?

**Whole Grain Yardstick Awards**



# WHOLE GRAIN CONSUMPTION

In August of 2004, the 2005 Dietary Guidelines Advisory Report first floated the idea of recommending that we all “make half our grains whole” as a minimum. The report created instant astonishment when it became clear that this would involve asking Americans to *decrease* consumption of refined and enriched grains anywhere from 21% to 60% (depending on age group and activity level) and to *increase* consumption of whole grains by 217% to 544%, as shown below.



## Recommended changes in consumption of whole and refined grains

By gender, by age, and by level of activity

Source: 2005 Dietary Guidelines Advisory Report, Table G2-9, August 2004

For most Americans, this was the first they had heard about the “whole grains gap” and the huge changes that would be necessary even to reach the point where half our grains are whole.

For the four and a half years since the release of this report, there has been great speculation on whether Americans have, in fact, made any progress toward these goals, and if so, how much. But official consumption data from the U.S. government lag several years behind; data

are not yet available for the period from January 2005 – when both the official update of the Dietary Guidelines took place and the Whole Grain Stamp was introduced – to the present.

**Data from NPD Group Fills the Void**

Fortunately, NPD Group, a global provider of consumer and retail market research information, closely tracks consumption trends and patterns, and was able to provide the Whole Grains Council with never-before released data showing whole grain consumption in the decade from 1998 to 2008.

First, the good news, according to NPD Group.

- **Consumption overall rose 20%** from 2005 to 2008, after remaining steady from 1998 to 2005.
- **18 to 34 year olds**, as a group, increased the most, with consumption **rising 38% from 2005 to 2008**.
- **60% of Americans consumed at least one whole grain** product during a typical two-week period in 2008, up from 35% in 2006.

The NPD Group data, however, also show that we still have a long way to go. Remember that chart on the previous page? An overall 20% rise in consumption may sound like a lot – but not when an increase on the magnitude of 200 to 500% is needed.

In short, overall consumption still falls far short of the targets recommended by our government and the consensus of health experts. Here are some additional details from the NPD Group Data:

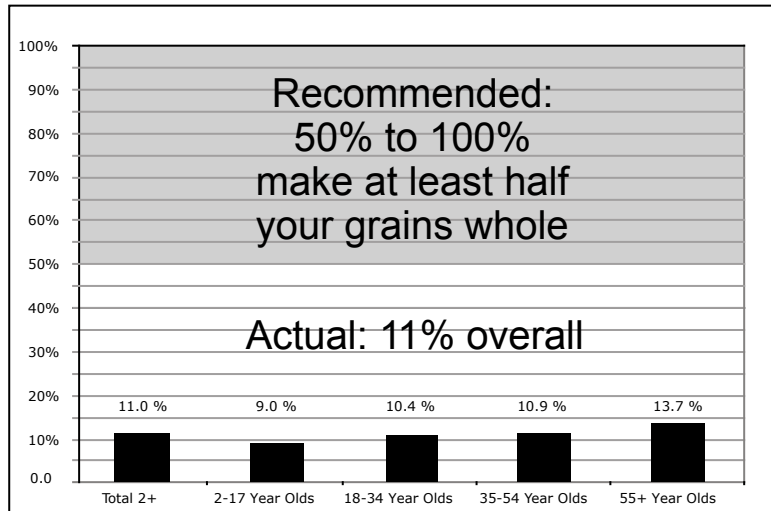
- Even after a 20% increase, **Americans still consume less than one serving of whole grains per day**. The 2008 data by age group are:

| <b>Age Group</b>           | <b>Actual Consumption</b> | <b>Recommended (min.)</b>        |
|----------------------------|---------------------------|----------------------------------|
| All Americans, age 2+..... | 0.73 servings / day ..... | 1.5 (toddlers) to 5 (active M)   |
| 2-17 year olds.....        | 0.56 servings / day ..... | 1.5 (toddlers) to 5 (active M)   |
| 18-34 year olds.....       | 0.80 servings / day ..... | 3 (inactive F) to 5 (active M)   |
| 35-54 year olds.....       | 0.75 servings / day ..... | 3 (inactive F) to 5 (active M)   |
| 55+ year olds.....         | 0.82 servings / day ..... | 3 (inactive F) to 4.5 (active M) |

- **Americans do not come close to making half their grains whole**. In 2008, whole grains as a percent of total grains consumed was just 11% overall:

| <b>Age Group</b>                 | <b>Actual Consumption</b> | <b>Recommended</b> |
|----------------------------------|---------------------------|--------------------|
| All Americans, age 2 and up..... | 11.0%.....                | 50% - 100%         |
| 2-17 year olds.....              | 9.0%.....                 | 50% - 100%         |
| 18-34 year olds.....             | 10.4%.....                | 50% - 100%         |
| 35-54 year olds.....             | 10.9%.....                | 50% - 100%         |
| 55+ year olds.....               | 13.7%.....                | 50% - 100%         |

*see graph on following page*



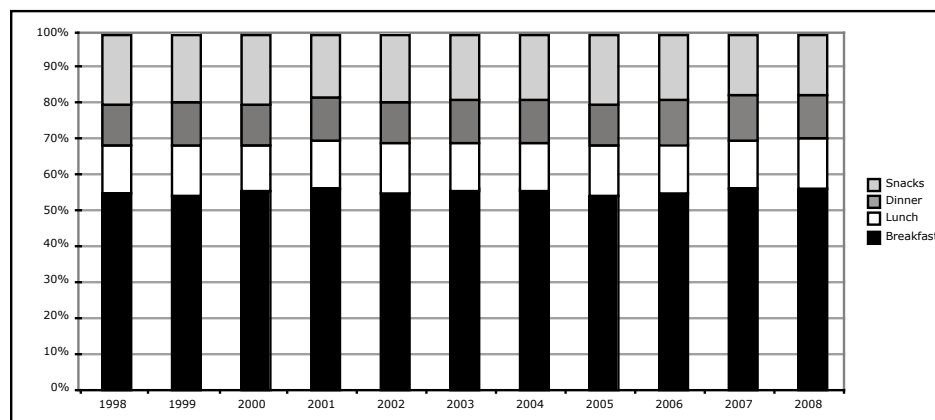
**Whole Grains as Percent of Total Consumption**  
*Source: NPD Group, December 2008*

## Whole Grains, by Eating Occasions

NPD Group data also breaks down whole grain consumption by eating occasion, showing:

- **The vast majority of whole grains – 56.9% overall – are consumed at breakfast.** Snacks rank a distant second at 17%, followed by lunch and dinner (approximately 12-14% each). Breakfast and dinner have gained share over the past decade, while snacks' share has declined.

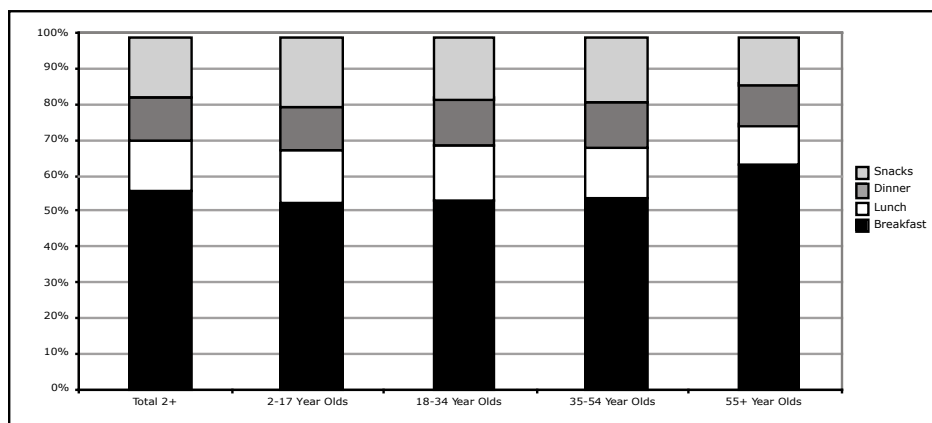
|           | 1998  | 1999  | 2000  | 2001  | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  | 2008  |
|-----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Breakfast | 55.6% | 54.9% | 56.3% | 57.0% | 55.8% | 56.4% | 56.5% | 55.0% | 55.4% | 56.6% | 56.9% |
| Lunch     | 13.2% | 13.9% | 12.8% | 13.5% | 13.9% | 13.4% | 13.4% | 14.0% | 13.8% | 13.7% | 13.7% |
| Dinner    | 11.4% | 12.1% | 11.4% | 11.7% | 11.4% | 11.7% | 11.6% | 11.6% | 12.2% | 12.5% | 12.4% |
| Snacks    | 19.8% | 19.1% | 19.6% | 17.8% | 19.0% | 18.4% | 18.6% | 19.5% | 18.5% | 17.2% | 16.9% |



**Whole Grains by Eating Occasion, 1998-2008**  
*Source: NPD Group, December 2008*

- **Age influences whole grain choices by eating occasion.** Those over 55 especially count on breakfast to enjoy their whole grains, while snacks play a much larger role with those under 55 than with those over 55.

|           | Total 2+ | 2-17 Year Olds | 18-34 Year Olds | 35-54 Year Olds | 55+ Year Olds |
|-----------|----------|----------------|-----------------|-----------------|---------------|
| Breakfast | 56.9%    | 53.2%          | 54.0%           | 54.6%           | 64.0%         |
| Lunch     | 13.7%    | 14.7%          | 15.7%           | 14.1%           | 11.3%         |
| Dinner    | 12.4%    | 12.3%          | 12.9%           | 13.0%           | 11.5%         |
| Snacks    | 16.9%    | 19.7%          | 17.4%           | 18.3%           | 13.3%         |



**Whole Grains by Eating Occasion, by age group**  
*Source: NPD Group, December 2008*

### Methodology of NPD’s National Eating Trends / Eating in America

NPD’s sample consists of an annual panel of 2,000 households from across the nation, including about 5,000 individuals each year. The sample is matched to U.S. Census statistics to ensure that it is representative of America at large.

Panelists record all food and beverage consumption, for every household member, for 14 days, including both at-home and away-from-home eating, and all meals and snacks. About 2% of the panel starts diary-keeping each week, to ensure that responses are spread throughout the year, covering all seasons, holidays, etc.

Once the food diaries are collected, NPD computes overall consumption, using eating frequency information from the National Eating Trends diaries and

- Nutrient values from the USDA’s National Nutrient Database for Standard Reference
- Average serving sizes from the What We Eat in America (WWEIA) dietary intake interview component of the National Health and Nutrition Examination Survey (NHANES)

NPD makes careful cross-references and comparisons to coding and procedures followed by What We Eat In America, so that the NPD data can be easily integrated into a total picture of American food consumption.

|                                      | <b>NPD's NET<br/>National Eating Trends</b> | <b>USDA / HHS WWEIA<br/>What We Eat in America</b>  |
|--------------------------------------|---|---|
| Size of sample                       | 2,000 households<br>~ 5,000 individuals     | 10,000 individuals  |
| Days sampled                         | 14 consecutive days                         | 2 non-consecutive days  |
| "People days" in sample              | About 68,000 people days                    | About 10,000 people days  |
| Sampling method                      | Detailed daily food diaries                 | Day 1: 24-hour food recall<br>using dietary interview<br>software<br>Day 2: telephone interview |
| Most recent data<br>as of March 2009 | February 2008<br>Nutrients, foods, trends   | Partial data from 2005-06<br>Only nutrients so far  |

### **At-a-glance Comparison of Consumption Data from NPD and U.S. Government**

If you would like a full description of NPD Group's methodology for the National Eating Trends survey, ask NPD for the 20-page PDF titled "NPD's Nutrient Intake Database Methodology."

You can find full information on WWEIA, NHANES at  
<http://www.ars.usda.gov/Services/docs.htm?docid=15044#2005-06>

# THE WHOLE GRAINS YARDSTICK PROJECT

Most of us follow the norms we see around us when we make behavioral decisions. We travel about the same speed as the other cars on the highway; if others in our office wear pinstripes to work, we don't wear t-shirts and jeans; and we're more apt to toss a gum wrapper on a dirty street than a clean one.

The norms we see around us can affect our food choices, too. We are, for example, influenced by what we see as the norm in supermarkets, in restaurants, and in the magazines we read every day. If these environments show a world where half the grains are whole, we're more apt to match this norm ourselves.

So what are the norms for whole grains today, in magazines, supermarkets, and restaurants? The Whole Grains Council carried out three survey projects in early 2009 to find out.

## WHOLE GRAINS IN MAGAZINES

### What We Did

We targeted a selection of national magazines that feature food prominently including popular women's magazines, plus food titles like Cooking Light, Bon Appetit, and Gourmet. For each magazine, we randomly picked six issues from 2008 or early 2009, and surveyed each issue for instances of whole and refined grains in articles, in recipes, and in photos. Ads were *not* included, as these are not controlled by editorial policy.

### Which Magazines Were Included

We included the following top magazines:

| <i>Magazine</i>          | <i>Circulation</i> |
|--------------------------|--------------------|
| Good Housekeeping        | 4,684,800          |
| Woman's Day              | 3,920,900          |
| Family Circle            | 3,914,900          |
| Ladies Home Journal      | 3,840,600          |
| O, the Oprah magazine    | 2,365,300          |
| Parents                  | 2,208,100          |
| Cooking Light            | 1,793,200          |
| Everyday with Rachel Ray | 1,783,500          |
| Bon Appetit              | 1,426,900          |
| Gourmet                  | 950,000            |

### How We Conducted Our Survey

Our survey counted the following words as whole grain

|                   |                    |                |           |
|-------------------|--------------------|----------------|-----------|
| brown rice        | whole [grain name] | * amaranth     | * quinoa  |
| whole wheat flour | wild rice          | * barley       | * sorghum |
| oats              | cracked wheat      | * buckwheat    | * teff    |
| oatmeal           | wheatberries       | * faro or faro |           |
| popcorn           | * multigrain       | * millet       |           |



We counted as refined grain every other grain word that did not specifically state it was whole grain, including:

|                   |                |                |                   |
|-------------------|----------------|----------------|-------------------|
| All-purpose flour | Durum          | Pearled barley | * graham crackers |
| Bran              | Enriched flour | Pita           | * polenta         |
| Bread             | Flour          | Rice           | * tortilla chips  |
| Cake flour        | Germ           | Tortillas      | * rye             |
| Corn              | Organic        | Wheat          | * spelt           |
| Degerminated      | Pasta          |                |                   |

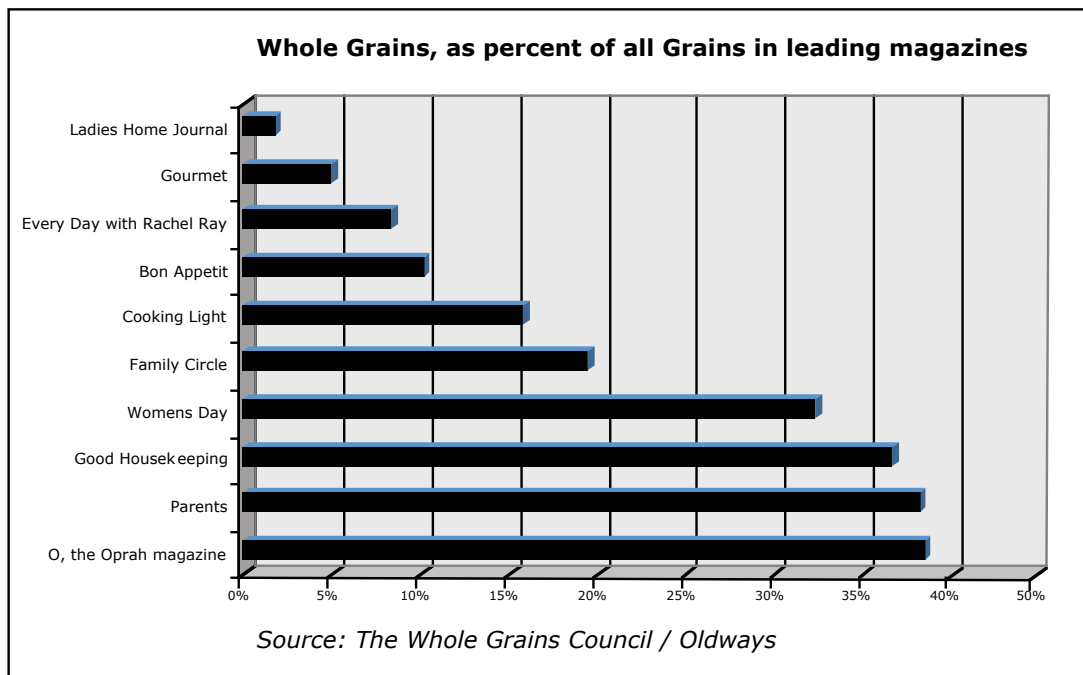
\* Words marked with an asterisk could be whole or refined, but we have grouped them where they are most likely to be true, to be consistent.

For photos, we counted only images that would clearly look refined or whole to the typical consumer, without reference to the text. In one magazine, for instance, a recipe called for brown rice, but the accompanying photo showed rice that was pure white. In this case, we counted an instance of whole grain for the text and an instance of refined grain for the photo. We freely admit that this process was somewhat subjective, but our goal was to process images on the level that they would be perceived by most consumers.

### Magazine Survey Results

Our magazine survey produced some surprising results, including:

- No magazine makes at least half its grains whole, but the best ones came closer than we had expected. Four magazines were clearly ahead of the pack, with coverage of whole grains ranging from 32% to 39% of total grains coverage.



- In general, **magazines talk up whole grains in the text of articles at a far higher rate than they actually use whole grains in recipes or in photos.** In other words, they're extolling the health benefits of whole grains – but then failing to follow through in using whole grains in more than a token amount of recipes.

Of course, this is only logical – it would be unusual to see in-depth articles discussing the benefits or attributes of refined grains. People are already eating plenty of refined and enriched grains. One of our editors summed it up well: “They know what to do with white bread already!”

|                           | <i>all</i> | <i>text</i> | <i>recipes</i> | <i>photos</i> |
|---------------------------|------------|-------------|----------------|---------------|
| Ladies Home Journal       | 2%         | 0%          | 4%             | 0%            |
| Gourmet                   | 5%         | 7%          | 4%             | 4%            |
| Every Day with Rachel Ray | 8%         | 10%         | 9%             | 7%            |
| Bon Appetit               | 10%        | 13%         | 10%            | 9%            |
| Cooking Light             | 16%        | 29%         | 17%            | 9%            |
| Family Circle             | 19%        | 61%         | 11%            | 11%           |
| Women’s Day               | 32%        | 69%         | 17%            | 9%            |
| Good Housekeeping         | 37%        | 59%         | 33%            | 29%           |
| Parents                   | 38%        | 53%         | 29%            | 27%           |
| O, the Oprah magazine     | 39%        | 57%         | 10%            | 28%           |

- For most magazines, **photos were the area where whole grains were least evident.** As an editor from one of these magazines explained to us, “Whole grains just don’t photograph as well.” And when they do, it may not be apparent to the naked eye that whole grains have been used – for instance, when whole white wheat flour has been used for baking.

### **The Whole Grains Yardstick: Which magazines measure up?**

Four Magazines clearly top the others and get the nod for our first Yardstick awards. They are Good Housekeeping, O, the Oprah magazine, Parents magazine, and Women’s Day.

The Whole Grains Council invites other magazines to use the “Whole Grains Yardstick” to measure their progress in featuring whole grains. Are *you* supporting a world where consumers can picture making at least half their grains whole? At the very least, are you moving in that direction, by including more whole grains this year than last? What editorial policies do you have in place to depict healthy eating as delicious and easy?

Consumers: Do a “Whole Grains Yardstick” survey of your favorite magazines, and write to the editors if they’re not measuring up.

# WHOLE GRAINS IN SUPERMARKETS

## What We Did

Our next adventure in quantifying the status of our whole grain food environment involved an in-depth study of a typical grocery store. Certainly the availability of whole grains as a percent of all grain-based foods would determine whether consumers can envision a world where at least half their grains are whole grains. So we set out to count all the grain-food SKUs in a supermarket, to get an idea of which, if any, aisles had reached the recommended norm of 50%.

## How We Conducted Our Survey

Our survey counted a product as whole grain if it met one or more of these criteria:

1. It has the Whole Grain Stamp on the package.
2. It has a whole grain as the first grain ingredient. Guidelines for words were the same as in our magazine survey, as described above.
3. It has the FDA-approved Whole Grain Health Claim on the package, worded similarly to this: "Diets rich in whole grain foods and other plant foods and low in saturated fat, and cholesterol, may help reduce the risk of heart disease and certain cancers."

## Which Stores Were Included

Clearly, surveying every grain-based product in a supermarket takes more time than skimming magazines, so we satisfied ourselves with taking an in-depth snapshot of a single store – a Hannaford Brothers supermarket in Dover, NH.

Hannaford's is a chain of about 165 stores in the northeastern U.S., owned by Delhaize. Its stores average about 48,500 square feet. Hannaford has taken a pro-active stance on consumer nutrition with its Guiding Stars labeling program, yet about 80% of products do not qualify for the good-better-best Guiding Stars symbol, so we consider the selection of products in its stores to be fairly typical of a mid-range store.

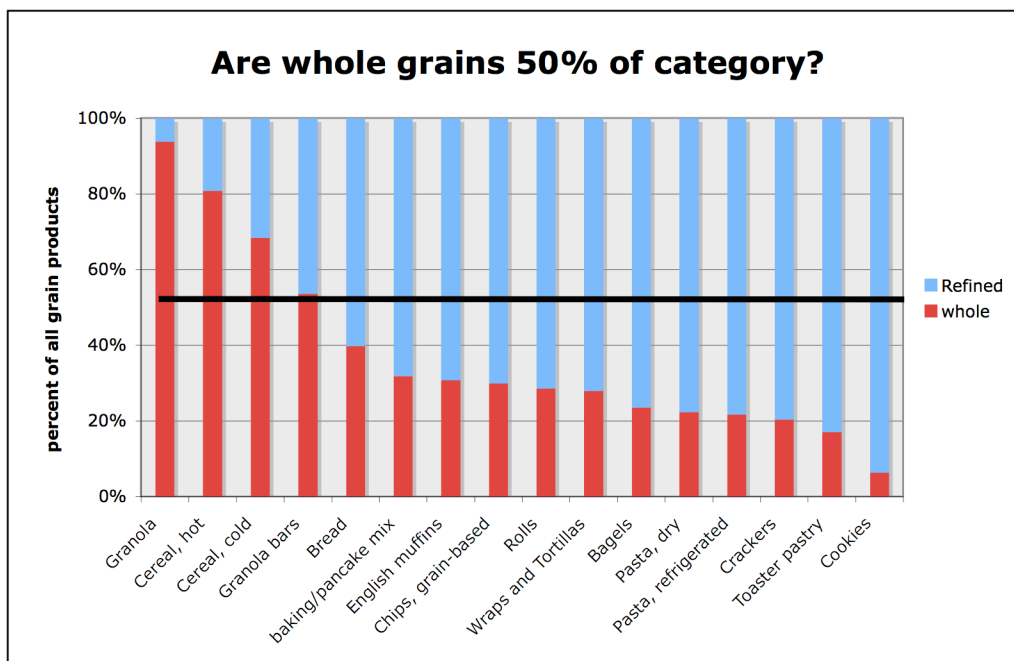
## Supermarket Survey Results

Our survey found that whole grain products do not yet approach 50% of all grain-food products in a typical supermarket. However, we were pleasantly surprised to learn that, overall, whole grain foods made up 34.7% of the grain-food products.

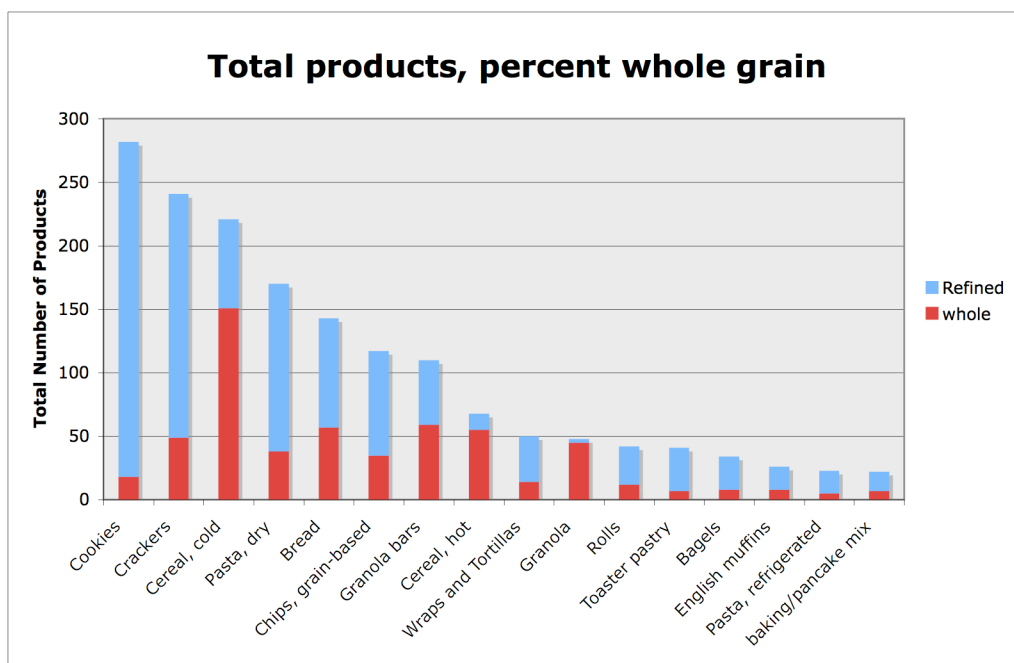
In fact, as shown in the charts on the following page, the proportion of whole grains varied widely by category of food (note: a few additional categories will be included in the next edition of this report). Here are some of the major categories:

| Category    | Total Products | Whole Grain | Refined | % whole |
|-------------|----------------|-------------|---------|---------|
| Bread       | 143            | 57          | 86      | 39.9%   |
| Cold cereal | 221            | 151         | 70      | 68.3%   |
| Hot cereal  | 68             | 55          | 13      | 80.1%   |
| Pasta, dry  | 170            | 38          | 132     | 22.4%   |
| Crackers    | 241            | 49          | 192     | 20.3%   |
| Cookies     | 282            | 18          | 264     | 6.4%    |

Cookies and crackers were the categories with the lowest proportion of whole grain choices. If we take those two categories out of the picture, the overall percent of whole grains rises to 44.9%!



While the chart above shows at a glance which categories reach the level of “making (at least) half the grains whole,” a second chart is useful for showing the range of choices in each category. It’s all well and good that the granola category is 93.8% whole grain, but there are only 48 different SKUs<sup>1</sup> in that category – while the cookie category, at 6.4% whole grain, has 282 SKUs.



<sup>1</sup> SKU stands for Stock Keeping Unit, the common retail term for each unique package. If corn flakes come in three sizes, each would be a different SKU, and would have a unique UPC code.

## But are they eating whole grains?

It's one thing to have products on the shelves, but are they selling through? We suspected so. After all, the low carb craze is over! Nielsen sales figures show that foods targeted to those who are "carb conscious" declined 31 percent since 2004.<sup>2</sup> But, since our shelf survey couldn't tell us how consumers might be reacting to all these products, we turned to a report from Packaged Facts for more evidence.

That April 2009 report, titled "The U.S.. Market for Whole and Other Grains: Trends and Developments," documented the change in bread consumption from Spring 2004 to Spring 2008, a period in which 99% of households surveyed used some kind of bread. The data showed that white and whole grain bread in fact changed places during this four-year period.

### U.S. Households eating white bread vs. other breads most often, 2004-2008<sup>3</sup>

| <i>Bread</i>       | <i>2004</i> | <i>2005</i> | <i>2006</i> | <i>2007</i> | <i>2008</i> |
|--------------------|-------------|-------------|-------------|-------------|-------------|
| White bread        | 52%         | 47%         | 46%         | 44%         | 43%         |
| Whole Wheat Bread  | 45%         | 45%         | 47%         | 49%         | 52%         |
| Multigrain         | 16%         | 19%         | 21%         | 22%         | 23%         |
| Rye / Pumpernickel | 6.4%        | 5.9%        | 6.1%        | 5.9%        | 6.3%        |
| Oat                | 4.7%        | 5.2%        | 4.9%        | 5.9%        | 6.1%        |
| Bran               | 4.0%        | 4.2%        | 4.3%        | 4.0%        | 4.4%        |

While it's impossible to be certain how much whole grain content is in any of the non-white breads self-reported by consumers, the bottom line is clear: plain "white" bread is losing favor among consumers who want more interesting textures, tastes – and more health benefits with each slice of their daily bread.

### Do Whole Grains Cost More than Refined Grains?

As long as we were meticulously logging every SKU in the store, we decided to also note the size of each product, in ounces, and its cost, to ascertain whether whole grains cost more than refined grains – and if so, by how much.

A glance at individual foods tells us whole grains do tend to cost more. A few examples:

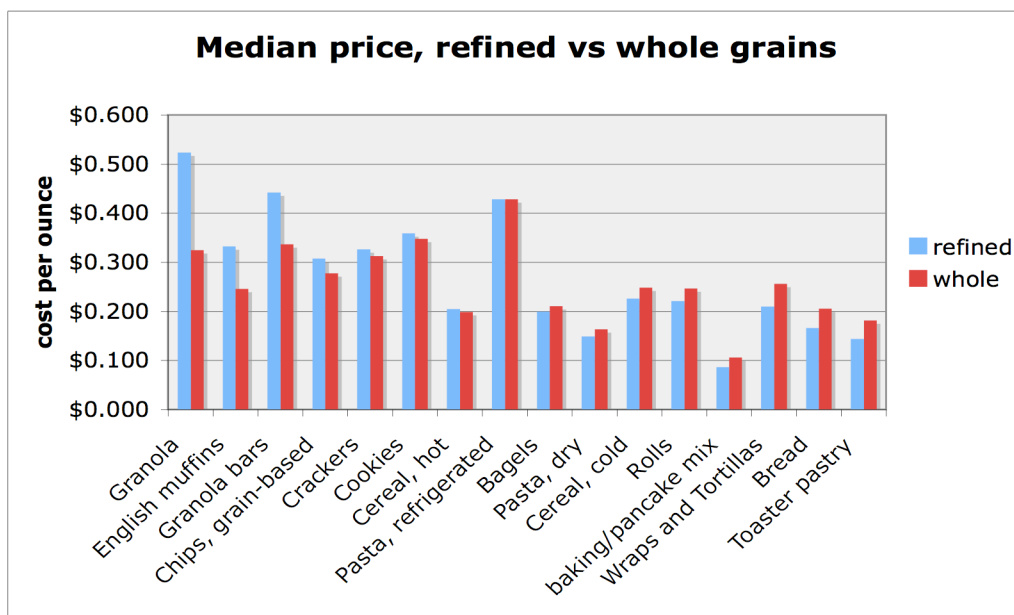
|                 |                     |                     |                   |
|-----------------|---------------------|---------------------|-------------------|
| National brand: | Whole grain penne   | \$1.92 for 13.25 oz | (14.5¢ per ounce) |
|                 | Refined grain penne | \$1.50 for 16 oz    | (9.4¢ per ounce)  |
| Store brand:    | Whole wheat bread   | \$2.59 for 24 oz    | (10.8¢ per ounce) |
|                 | Refined wheat bread | \$1.59 for 20 oz    | (8¢ per ounce)    |

To make our comparison, we divided the cost by the weight of the product to get a per-ounce price for each whole grain food. Then, we found two values for each category:

- To give us an idea of the **most typical price** in each category, we found the median of all whole grains, and all refined grains, in that group.
- To learn how the least well off among us might be affected by any price gap, we also found **the lowest price** for both whole and refined choices in a category.

<sup>2</sup> Nielsen's Healthy Eating Report for 2008, as reported in Brandweek (a unit of Nielsen) on January 22, 2009.

<sup>3</sup> Simmons Market Research Bureau, Summer 2008 National Consumer Survey, compiled by Packaged Facts and appearing in the Packaged Facts report "The U.S.. Market for Whole and Other Grains: Trends and Developments" April 2009. Reprinted with permission.



In the chart above, whole grains maintain a surprising parity with refined grains in price. In four of our categories, whole grains cost a good bit more than refined grains (22% to 26% more). In eight categories, whole and refined grains are close to equal (with whole grains costing 90% to 112% of refined grains), and in the remaining three categories, whole grains actually cost markedly less!

Specialty products often account for this last phenomenon. In the granola category, for example, only a few SKUs were *not* whole grain (since oats are the primary ingredient in most granolas). The others? They were expensive gluten-free products. A similar situation accounts for granola bars: “normal” bars are based on oats; more expensive bars feature a higher proportion of specialty ingredients like nuts, nutraceutical-type added fibers, etc.

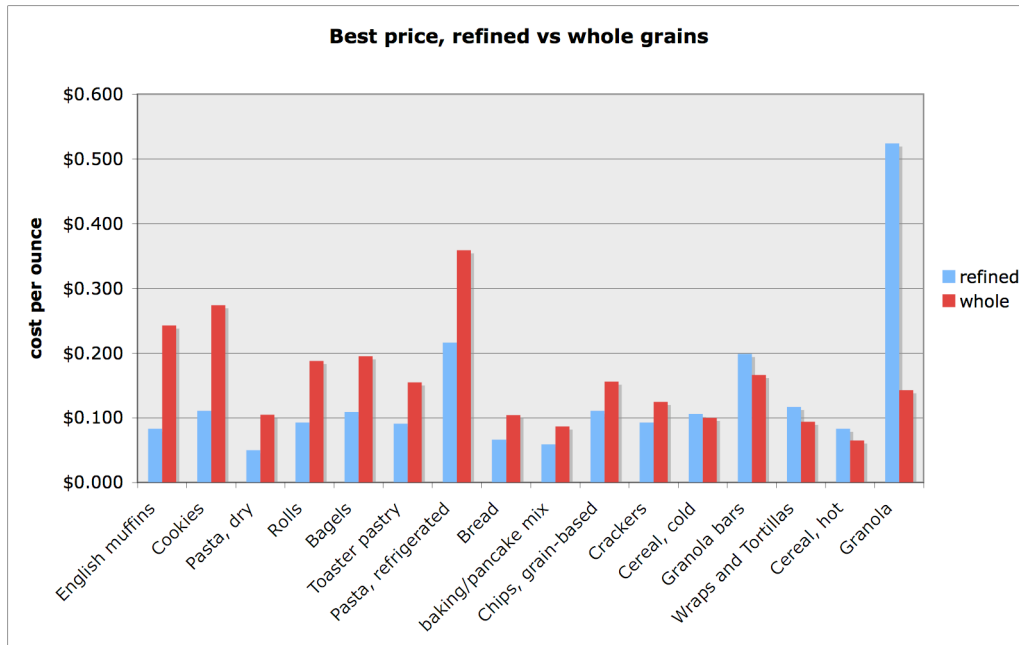
The English muffins category may have been affected by the slightly heavier weight of the whole grain muffins. With comparable prices for most English muffins, the whole grain English muffins ended up with a lower per-ounce cost. What’s more, all of the categories with a limited number of SKUs should be taken with a grain of salt, as the sample size is just not big enough to capture large trends.

### **Bigger Gap on the Budget End**

Times are tough, economically, these days. So we also thought it was important to compare what shoppers would have to pay to buy the *least* expensive whole grain, as compared to the *least* expensive refined grain.

The “whole grains price gap” is a lot wider when we look at the data from this perspective. In some categories, a generic store brand is available in refined form, but not for whole grain. This was true in English muffins, for instance, and in breads and cereals (both hot and cold).

Whole grains need to be accessible to all Americans, at all economic levels. We encourage supermarket chains to see the potential for offering store brands of whole grain foods in other categories where the whole grains gap looms large.



### The Whole Grains Yardstick: Which categories measure up? Which stores?

The Whole Grains Council invites stores across the land to use the “Whole Grains Yardstick” to measure their progress in stocking their shelves with more whole grains. It’s not enough to offer 49 choices of whole grain crackers, and 241 choices of refined grain crackers. “We would stock them if people bought them...” People need a reasonable number of choices before they can vote with their wallets.

**Manufacturers:** Offer whole grain products that will fly off the shelves, so that stores will be rewarded for stocking more whole grains

**Consumers:** Do a “Whole Grains Yardstick” survey of your favorite stores, and write to the manager if they’re not measuring up. And make sure to fill your cart with whole grains when you shop, to show that you’re serious about supporting whole grains.

# WHOLE GRAINS IN RESTAURANTS

## What We Did

Our final snapshot of the whole grain environment that surrounds consumers was a survey of national chain restaurants. We knew going in that an atmosphere where half the grains are whole is almost unheard of in chain restaurants. (That's why we were so delighted last year when PF Chang's China Bistro and Pei Wei's Asian Diner told us that 45% of their customers choose brown rice!) So in this case, we set our sites a lot lower, and decided to find chain restaurants offering at least one whole grain choice on the menu.

## Which Restaurants We Included

We attempted to contact 76 restaurant chains, and were successful in finding 41 chains that serve at least one whole grain choice every day. See next pages for full list.

## How We Conducted Our Survey

We called and emailed the headquarters of each chain, and asked if they served any whole grains. In many cases, we used prompts to remind the interviewee of what types of foods might qualify, such as "Do you offer brown rice?" or "Do you serve oatmeal or General Mills cereals at breakfast?"

Our standard was to count only foods that would qualify for the Whole Grain Stamp, i.e., that contain 8g or more of whole grain ingredients per serving. Many foods – like the three listed above – were not in question. Often, however, we'd get answers like, "Sure, we have a wheat roll for our sub sandwiches" or "We've got a great multi-grain wrap." In that case, we would ask them to quantify the whole grain content, so we could be sure the food qualified. (It doesn't always. One sub sandwich chain with a reputation for healthy food found its "wheat" roll actually contained only 7% whole wheat.)

## Restaurant Survey Results

We found that eleven of the thirty largest chain restaurants in the United States offer at least one whole grain choice. That's 36.7% of these top chains – a penetration rate uncannily similar to whole grains in supermarkets and in the best magazines.

| Restaurant          | Rank <sup>4</sup> | Outlets <sup>5</sup> | WG choice(s) / whole grain per serving      |
|---------------------|-------------------|----------------------|---|
| McDonald's          | #1                | 13,673               | Premium Chicken Sandwich, 8 grams           |
| Starbuck's          | #4                | 11,011               | Oatmeal and whole grain pastries            |
| Pizza Hut           | #6                | 12,877               | The Natural pizza, 8 grams                  |
| Chili's Grill & Bar | #12               | 1,606                | Guiltless chicken sandwich, whole wheat bun |
| Jack in the Box     | #15               | 2,173                | Chicken Fajita WG Pita, 16 grams            |
| TGI Friday's        | #17               | 609                  | Dragonfire Chicken stirfry with brown rice  |
| Olive Garden        | #18               | 651                  | Whole wheat linguini in any pasta dish      |
| Panera Bread        | #25               | 1,185                | Whole grain breads and bagels               |
| Papa John's         | #26               | 2,700                | Whole grain pizza crust, 40g                |
| Ruby Tuesday        | #28               | 800                  | Brown Rice Pilaf on "Smart Eating Menu"     |
| Cracker Barrel      | #29               | 588                  | Oatmeal; whole wheat bread on sandwiches    |

<sup>4</sup> 2008 R&I Top 400 Chains, Restaurants & Institutions magazine at [www.rimag.com/article/CA6574478.html](http://www.rimag.com/article/CA6574478.html)

<sup>5</sup> U.S. outlets only



## Whole Grains Council Restaurant Survey Results

| Chain                       | Rank | Locations                         | Whole Grain Options <sup>6</sup>  |
|-----------------------------|------|-----------------------------------|---|
| Atlanta Bread               | #194 | 135 locations<br>25 states        | Whole Grain Bread or a Whole Grain Bagel may be used on any sandwich. Atlanta Bread's Whole Grain Bread contains 16.8g of whole grains per slice or 33.6g per one full sandwich. Coming soon: Irish oatmeal.  |
| Au Bon Pain                 | #118 | 216 locations                     | Oatmeal, Honey Nine Grain Bagel, Whole Wheat Multigrain Bread, Brown Rice in the Harvest Rice Bowl, Bulgur Wheat Pilaf, Quinoa, Muesli  |
| B. Good                     |      | 4 locations, MA                   | All burgers and sandwiches are made on a whole grain bun.   |
| Boloco Burritos             |      | 16 locations<br>3 states          | Whole wheat tortillas and brown rice available with all burritos.   |
| Bruegger's Bagels           | #182 | 281 locations<br>23 states and DC | Whole wheat bagel and whole wheat wrap can be used on any sandwich.   |
| Buca di Beppo               | #139 | 89 locations<br>26 states and DC  | 100% whole wheat penne available as an option in any pasta dish.  |
| Cereality                   |      | 7 locations<br>4 states           | Homemade granolas and General Mills' whole grain cereals.   |
| The Cereal Bowl             |      | 4 locations<br>East Coast         | Makes cold bowls with General Mills' and Kashi cereals and hot bowls with oatmeal, as well as serving up oatmeal smoothies known as "Oaties" and granola and yogurt parfaits.   |
| Chelos                      |      | 9 locations in R.I.               | Whole wheat bulky roll and a whole wheat wrap   |
| Chili's Grill & Bar         | #12  | 1,606 locations                   | Guiltless chicken sandwich comes with a whole wheat bun.  |
| Corner Bakery Café          | #147 | 111 locations<br>8 states and DC  | Oatmeal by the bowl, and a variety of whole grain breads.   |
| Cosi                        | #190 | 144 locations<br>18 states and DC | Etruscan whole grain bagel and bread, and granola cereal.   |
| Cracker Barrel              | #29  | 588 locations<br>Nationwide       | Choose to have any sandwich served on whole wheat Sourdough Bread; French Toast can be made with whole wheat Sourdough Bread; oatmeal breakfast and an assortment of General Mills' whole grain cereals.  |
| CBW (Crazy Bowls and Wraps) |      | 9 locations<br>St. Louis, MO      | Brown rice an option in all bowls; whole wheat tortillas an option for all wraps.   |
| Farrelli's Pizza            |      | 5 locations, WA                   | 100% whole grain pizza crust  |
| Genghis Grill               |      | 25 locations<br>9 states          | Brown rice available in any Build Your Own bowls.   |
| Great Harvest Bread Company | #253 | 215 locations<br>Nationwide       | Legendary line of handcrafted whole grain breads made daily with fresh-ground premium whole wheat, pure and simple ingredients, and without preservatives, additives or dough conditioners. Also provide healthy complementarily whole grain products, which can vary by location, such as soups, sandwiches, and take-home mixes for whole grain breads, cereals, trail mix, cookies and pancakes. |
| Hobee's                     |      | 8 locations<br>South SF Bay Area  | Whole grain bread, whole wheat buns and tortillas, brown rice pilaf, breakfast oatmeal bar, honey whole wheat pancakes, and granola cereals.  |
| Jack in the Box             | #15  | 2,173 locations<br>18 states      | The Chicken Fajita Pita, a staple on Jack's menu for 20 years, gets a nutritional boost with the addition of a whole grain pita containing 16 grams of whole grains per serving.  |
| Jamba Juice                 | #106 | 710 locations                     | Steel cut oatmeal   |

<sup>6</sup> The Whole Grains Council updates this list quarterly, but rapidly changing menus mean that some entries may not be complete at all times.

| Chain                       | Rank | Locations   | Whole Grain Options <sup>6</sup>  |
|-----------------------------|------|---|---|
| Jersey Mike's               | #191 | 412 locations<br>25 states  | Wheat Bread has 16g of whole grain in a regular (half roll) and 32g of whole grain in a giant (whole).  |
| Maggiano's Little Italy     | #94  | 43 locations  | Whole wheat penne offered as substitution.  |
| McDonald's                  | #1   | 13,673 U.S.<br>1,072 UK   | U.S.: Premium Chicken Sandwiches have a bun containing 8g of whole grain. UK: Quaker oatmeal available for breakfast.                         |
| Noodles & Co.               | #192 | 191 locations<br>18 states  | Whole grain Tuscan linguini dish; 100% whole grain fettuccine available as an option in any pasta dish.                                       |
| Olive Garden                | #18  | 651 locations<br>U.S. and Canada                                    | Whole wheat linguini is available as an option in any pasta dish.   |
| Organic to Go               |      | 160 locations<br>3 states   | Whole grain breads and wraps offered through kiosks and cafés in office buildings and college campuses. Catering also available.              |
| Panera                      | #25  | 1,185 locations<br>Nationwide                                       | Offering freshly baked whole grain and white whole grain breads and bagels, for sale by the loaf or served with sandwiches, salads and soups. |
| Papa John's                 | #26  | 2,700 locations<br>Nationwide                                       | The first national pizza chain to roll out a 100% whole wheat pizza crust, containing 40g of whole grains.                                    |
| Pasta Pomodoro              |      | 42 locations<br>2 states  | Organic whole wheat fusilli may be substituted in most pasta dishes.  |
| Pei Wei Asian Diner         | #140 | 158 locations<br>21 states  | Offers brown rice as an option with all meals.  |
| PF Chang's China Bistro     | #47  | 180 locations<br>39 states  | Offers brown rice as an option with all meals.  |
| Pizza Hut                   | #6   | 12,877 locations<br>nationwide                                      | Offers multigrain crust on its Natural Pizza, with 8g of whole grain per serving.   |
| Pump Energy Food            |      | 6 locations in NYC  | Offers brown rice, whole wheat breads and pitas, and whole wheat pasta.   |
| Roly Poly Sandwich Shop     | #366 | 115 locations<br>22 states  | Customers can further enhance already healthy selections by substituting a whole wheat tortilla on any sandwiches.                            |
| Romano's Macaroni Grill     | #53  | 209 locations<br>41 states  | Whole wheat penne is available on request in any pasta dish or as a substitute for orzo or potatoes.  |
| Rubio's Fresh Mexican Grill |      | 182 locations<br>5 states   | HealthMex grilled chicken or grilled veggie burrito on whole wheat tortilla.  |
| Ruby Tuesday                | #28  | 800 locations<br>Nationwide   | "Smart Eating Menu" includes Brown Rice Pilaf.  |
| Rumbi Island Grill          |      | 23 locations<br>3 states  | Brown rice offered with all rice bowls, and can be requested for other entrees.   |
| Samurai Sam's               |      | 73 locations<br>18 states   | Brown rice can be substituted in any dish. Whole wheat wraps and soba noodles featured.   |
| Starbucks                   | #4   | 11011 locations<br>nationwide                                       | "Perfect oatmeal" with toppings, whole grain fruit stellas, and more.   |
| Taco Time                   | #179 | 387 locations<br>U.S. and Canada                                    | Veggie burrito, super soft taco, is available in a whole wheat tortilla.  |
| TGI Friday's                | #17  | 609 locations   | Dragonfry Stirfry comes automatically with brown rice; request it with other dishes.  |
| UFood Grill                 |      | 10 locations<br>4 states  | Brown rice in "UBowls" and whole wheat bagels on the breakfast sandwiches. Whole grain wheat breads for sandwiches.                           |
| Uno Chicago Grill           | #78  | 200+ locations in<br>U.S., UAE, Korea,<br>Honduras, Saudi<br>Arabia | Brown rice and Barilla Plus (not really a whole grain but still really healthy!) pasta available.   |
| Whole Foods Market          |      | 275+ locations<br>U.S., Canada and<br>UK                            | It's a store, not a restaurant – but Whole Foods' deli take-out department offers a range of whole grain choices for lunch or dinner.         |

## WHOLE GRAINS YARDSTICK SUMMARY

The Whole Grains Council's survey of magazines, restaurants, and supermarkets demonstrates that we're not yet making (at least) half our grains whole. Still, it's encouraging that we seem to be reaching a level where about a third of our grains are whole – an indicator of tangible progress in recent years.

|  |       |
|--|-------|
| Percent of top chains serving whole grains | 36.7% |
| Percent of whole grains in a supermarket   | 34.7% |
| Percent of whole grains in top magazines   |       |
| O, the Oprah magazine                      | 38.5% |
| Parents magazine                           | 38.3% |
| Good Housekeeping                          | 36.8% |
| Women's Day                                | 32.4% |

Look around you. How do the whole grain choices measure up in *your* store... *your* grocery cart... *your* magazine... *your* brand portfolio... and how can *you* play an active role in making sure that at least half our grains are whole?

## MORE WHOLE GRAINS YARDSTICK AWARDS

During the rest of 2009 and 2010, the Whole Grains Council will be setting measurement criteria for each of several different areas, like those described above for magazines and supermarkets, and we'll be inviting interested companies and organizations to see how they stack up.

Watch for us to award more Whole Grains Yardstick Awards in the coming months, to reward those who are measuring up in the realm of whole grains.