

# WHOLE GRAIN TRENDS: GLUTEN-FREE



## Just Ask for Whole Grains

A Scientific, Culinary, and Consumer Conference

Oldways and the Whole Grains Council

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# Who Needs a Gluten-Free Diet?

- Celiac patients
- Wheat-allergic
- Gluten-intolerant
- Autistic children
- ADHD children
- Other Autoimmune diseases



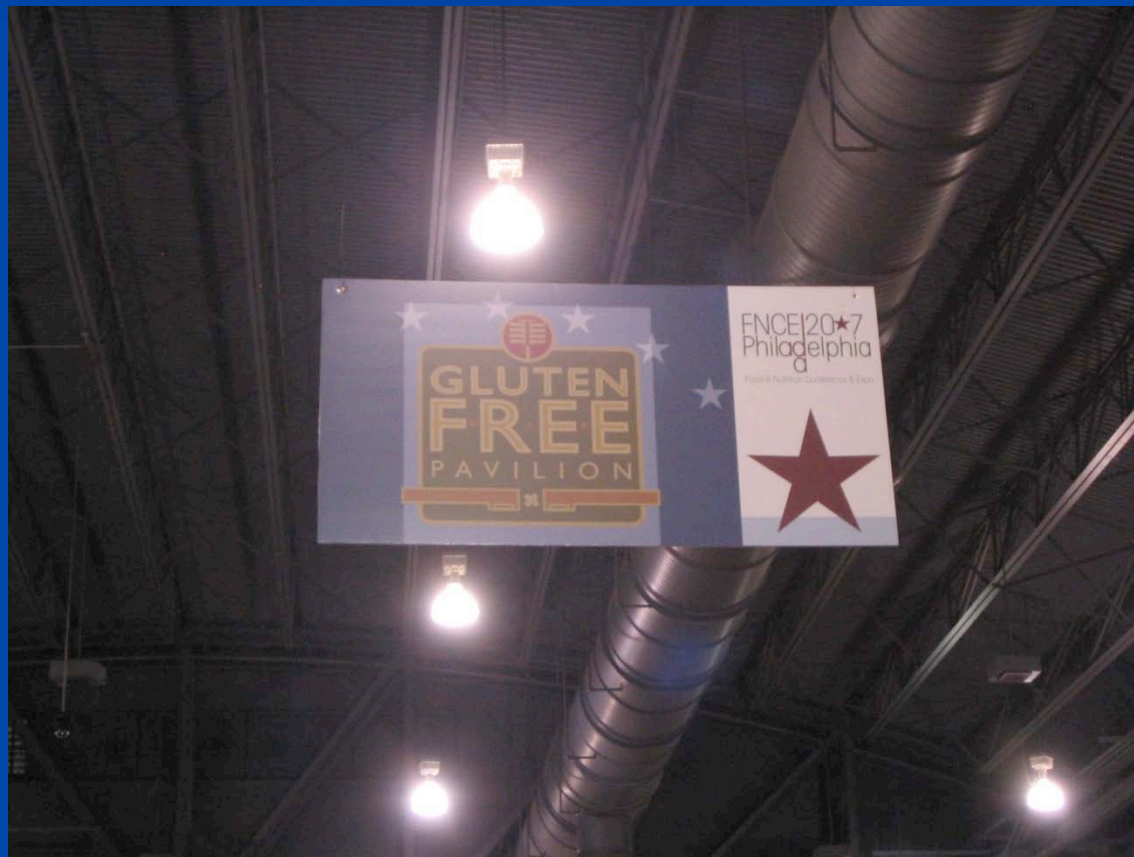
# What is Celiac Disease?

- Celiac disease is an autoimmune condition that requires a strict gluten-free diet for life.
- Celiac patients avoid wheat— and barley, rye, spelt, triticale, and non-GF oats (more on oats later)— because they contain gluten, a protein.
- Gluten damages lining of small intestine, inhibiting absorption of nutrients. Untreated, it can be fatal.

# Gluten-free Awareness Grows

- In 2004, National Institutes of Health (NIH) said the incidence of celiac disease—1 in 100 Americans—is 10 times higher than previously thought. (NIH, 2004)
- Celiac disease is regarded as a viable medical condition and the “the most common—and one of the most under-diagnosed—hereditary autoimmune conditions in the United States today. It is as common as hereditary high cholesterol.” (Peter H. R. Green, MD, and Rory Jones, authors of *Celiac Disease: a Hidden Epidemic* (HarperCollins, 2006))

# Gluten-Free Aisle at American Dietetics Association 2007



# What Do We Eat?

- Avoid wheat, barley, rye, spelt, triticale
- Eat food made from rice, potato, corn, bean, sorghum, tapioca
- Also eat amaranth, buckwheat, mesquite, millet, Montina (Indian ricegrass), quinoa, teff ...and oats



# Gluten-Free Variety



# Gluten-Free Market Today

- More than 3,150 products carry gluten-free claims.
- U.S. retail sales of gluten-free products have been growing at an annual rate of 27 percent since 2001.

Sources: FoodNavigator.com, MarketResearch.com, SPINS



# Gluten-Free Market Growth

- Market was \$210 million in 2001 and has grown at a compounded annual growth rate of 27% to reach \$700 million in 2006. (FoodNavigator.com)
- Market will continue to grow at more than 25% per year through 2010 as more people are diagnosed. (SPINS)
- By 2010, gluten-free products are predicted to be a \$1.7 billion industry. (MarketResearch.com)

# Gluten-Free Market Growth

- "For every celiac diagnosed there are an average of 50 others that have not been diagnosed yet."
- "By the next generation, there could be one diagnosed celiac among every 50 people, or 6 million Americans seeking a gluten-free diet, as the diagnoses catch up with the celiac population."

Source: Alessio Fasano, MD, founder, Center for Celiac Research, University of Baltimore School of Medicine, quoted in [www.WashingtonPost.com](http://www.WashingtonPost.com), August 8, 2007)

# Gluten-Free Oats

- Gluten-Free oats are now available from several companies in rolled, steel-cut, whole oat groats, and flour:

... in the U.S...

- Bob's Red Mill
- Gifts of Nature
- Gluten-Free Oats

.....and Canada:

- Cream Hill Estates
- Farm Pure



# Gluten-Free Labeling



- First phase of Food Allergen Labeling and Consumer Protection Act (FALCPA) went into effect on January 1, 2006.
- All foods containing top 8 allergens (wheat, eggs, milk, soy, tree nuts, peanuts, shellfish, and fin fish) must include an allergen statement on the label.
- Allergen labeled in plain language after the ingredient is listed (e.g., whey 'dairy') or in an allergen statement at the end of the ingredient listing (e.g., CONTAINS: WHEAT).

# Gluten-Free Labeling

- The second phase of FALCPA involves the definition of “gluten-free.”
- The Food and Drug Administration (FDA) suggests 20 ppm (parts per million) as an acceptable level of gluten in food.
- <http://www.cfsan.fda.gov/~dms/glutqa.html>
- <http://www.cfsan.fda.gov/~lrd/fr070123.html>
- Ruling goes into effect August, 2008.



# Gluten-Free Certification

Two organizations offer certification for businesses offering gluten-free products:

- Gluten-Free Certification Organization (GFCO)

- [www.gfco.org](http://www.gfco.org)

- Celiac Sprue Association

- [www.csaceliacs.org](http://www.csaceliacs.org)

