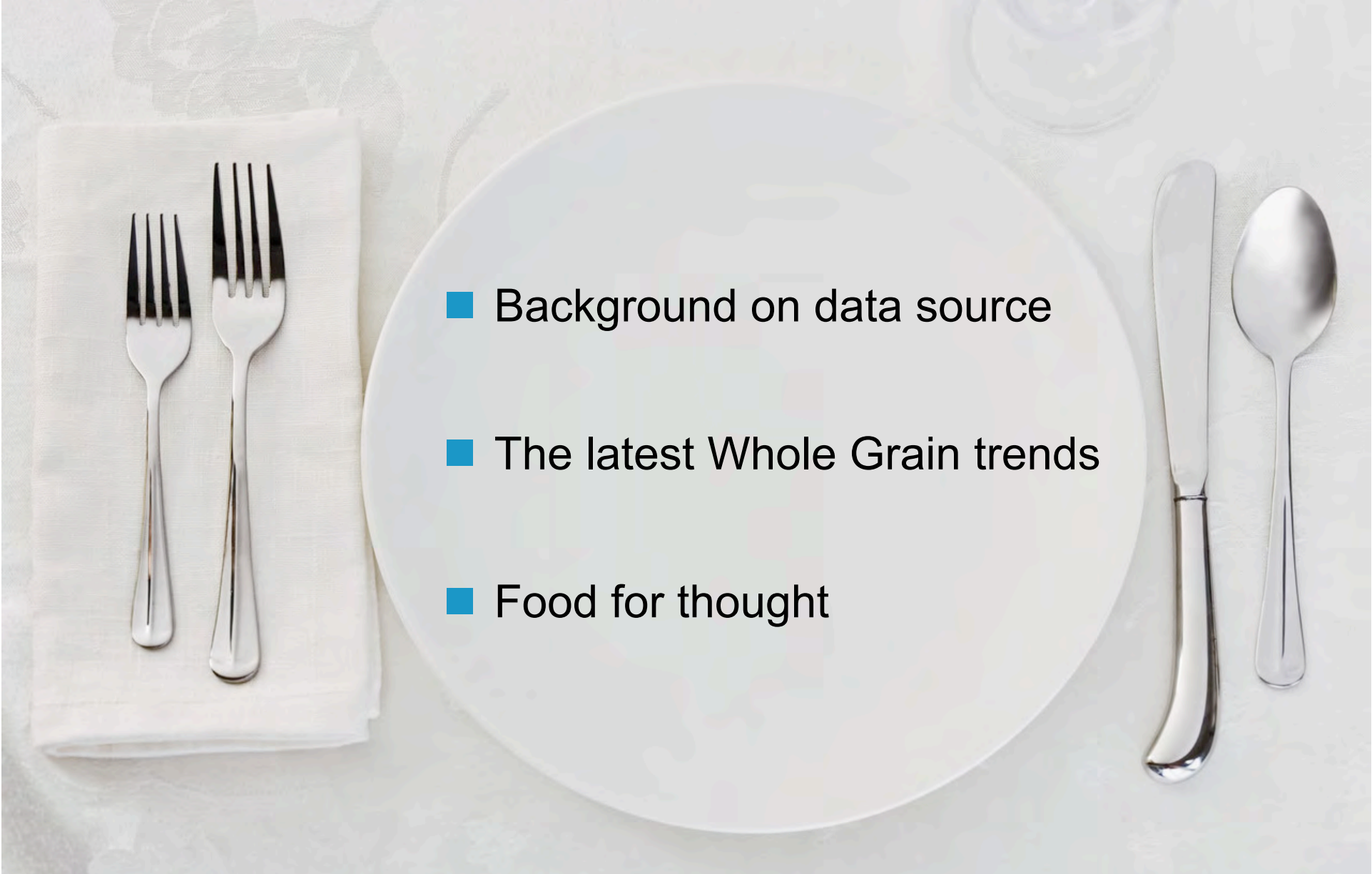


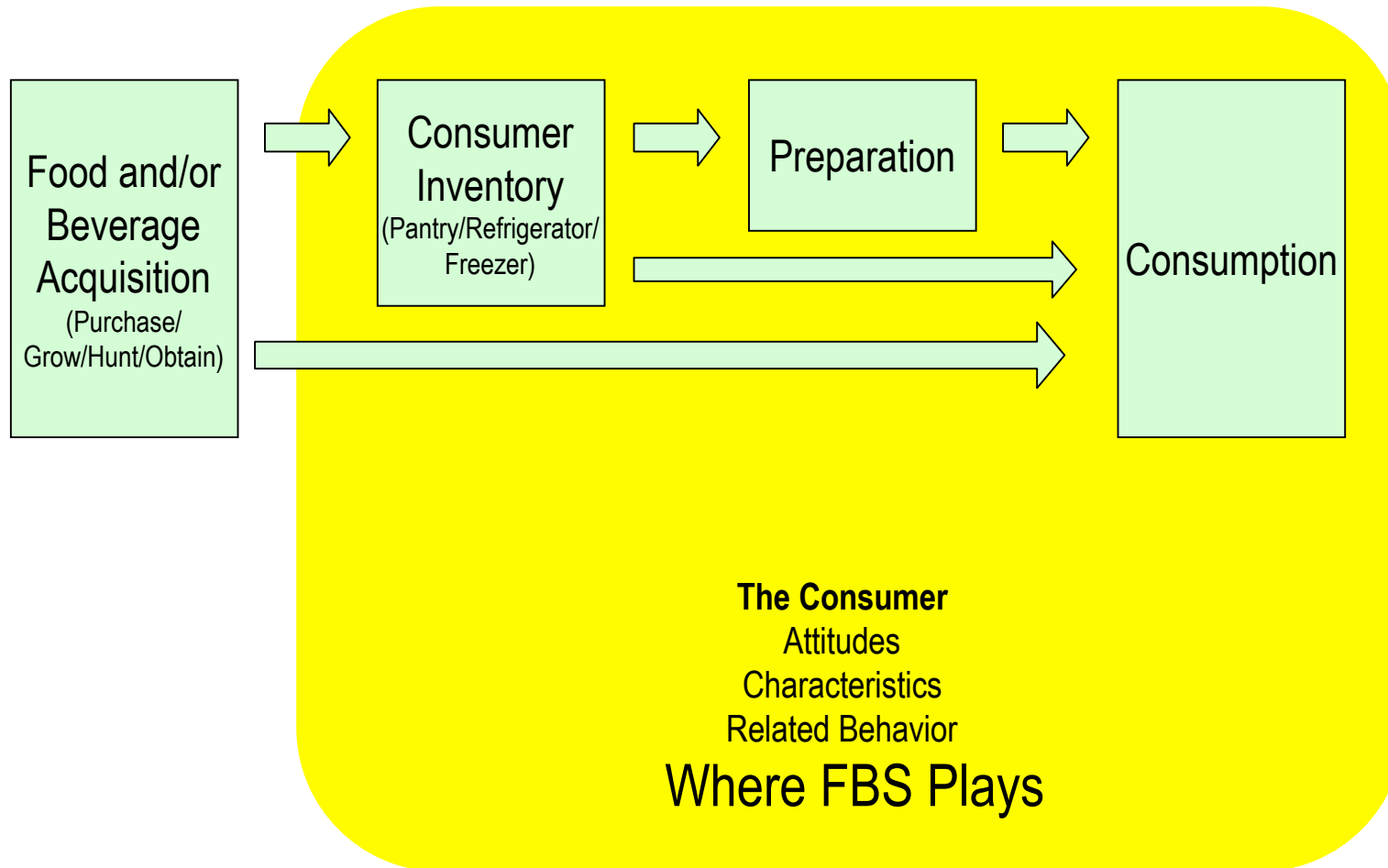
# Whole Grain Consumption: Are We Making A Dent?



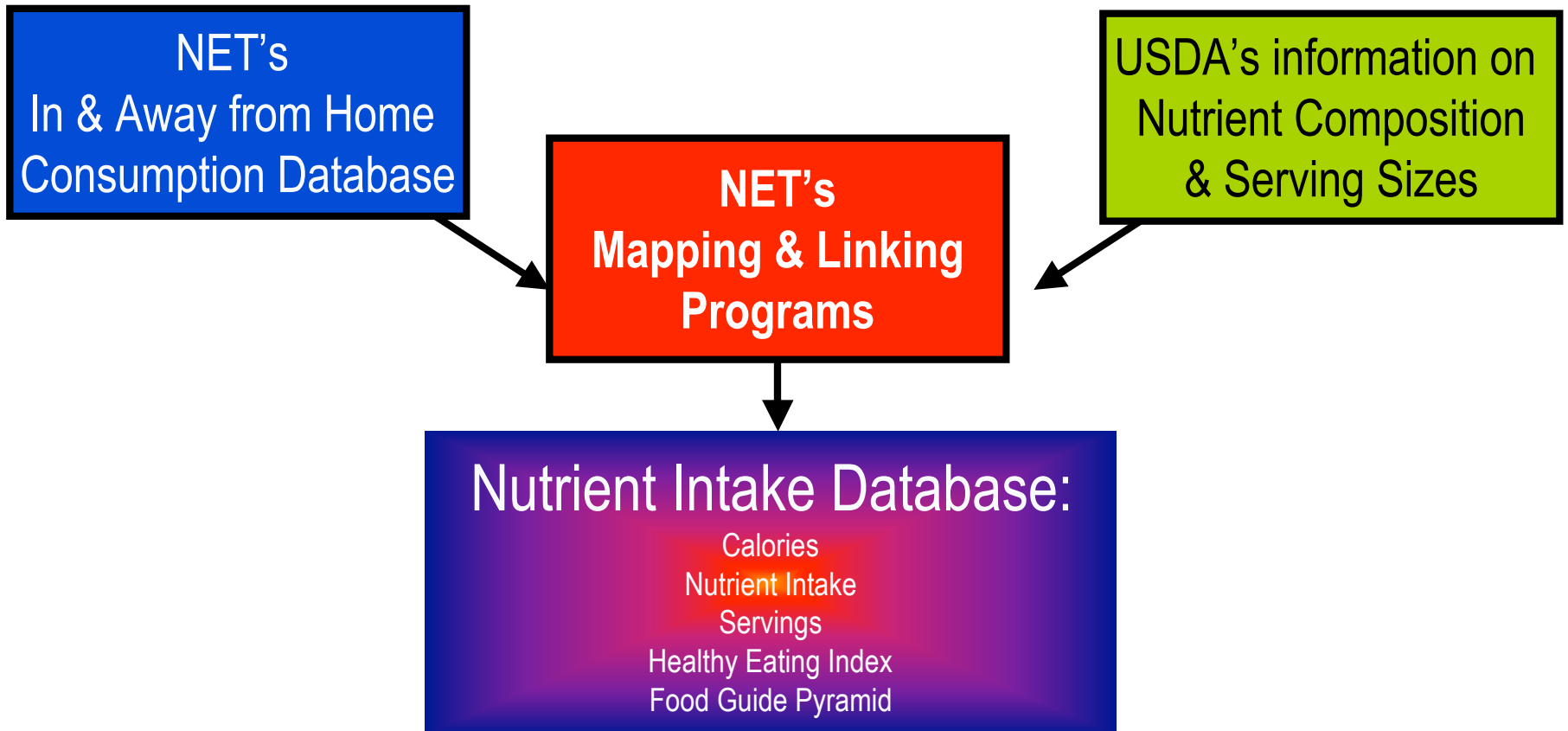
## On our menu today...

- 
- A top-down view of a white tablecloth with a white plate, silverware, and a napkin. The plate is in the center, with a napkin and two forks to the left, and a butter knife and spoon to the right. The background is a light-colored, patterned tablecloth.
- Background on data source
  - The latest Whole Grain trends
  - Food for thought

# Food & Beverage Group Information Scope



# Nutrient Intake Database

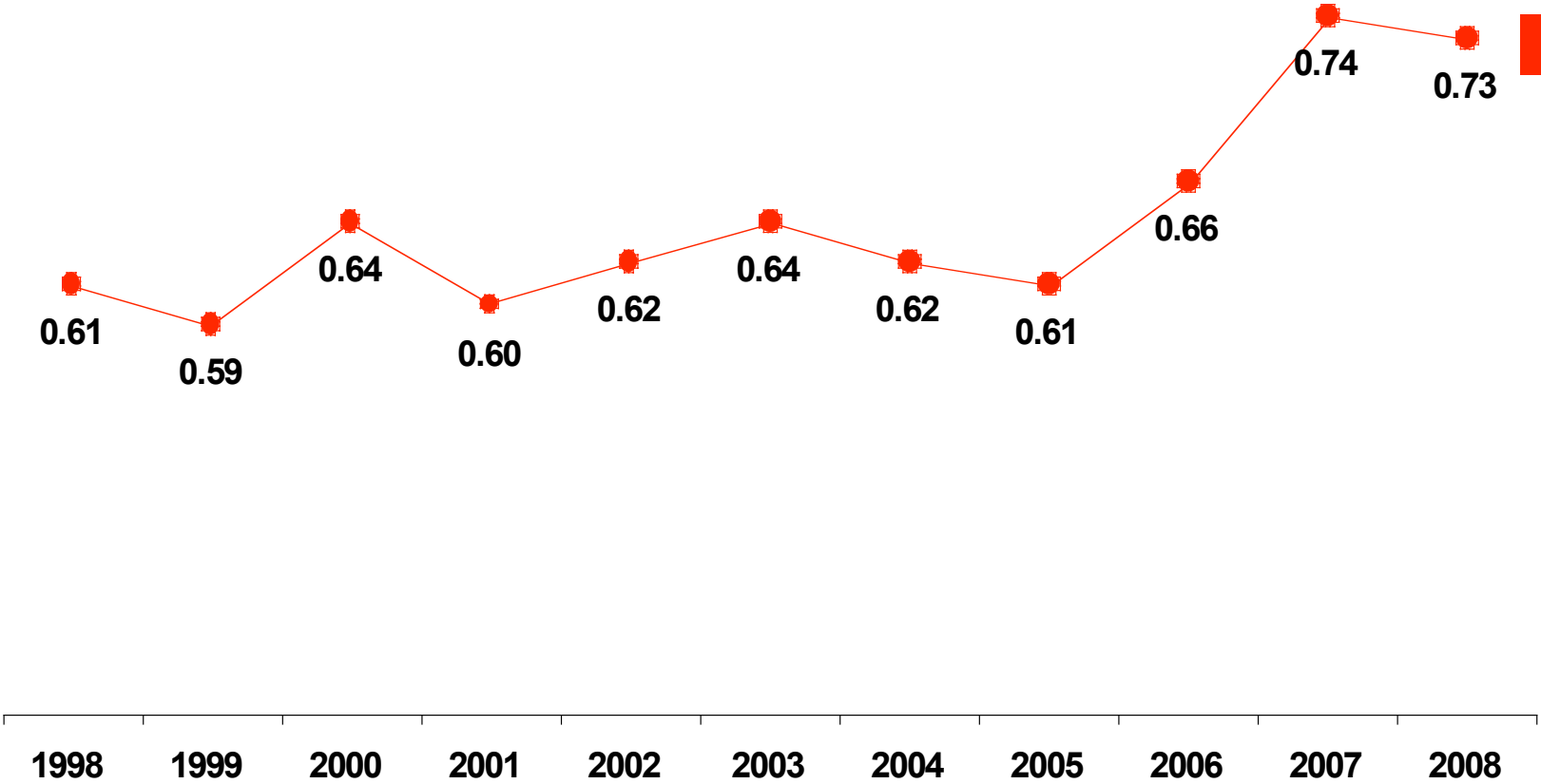


# Are we eating more whole grains?

Average Daily Pyramid Servings of Whole Grains (ozs.)

Pt. Chg. '08 v '98

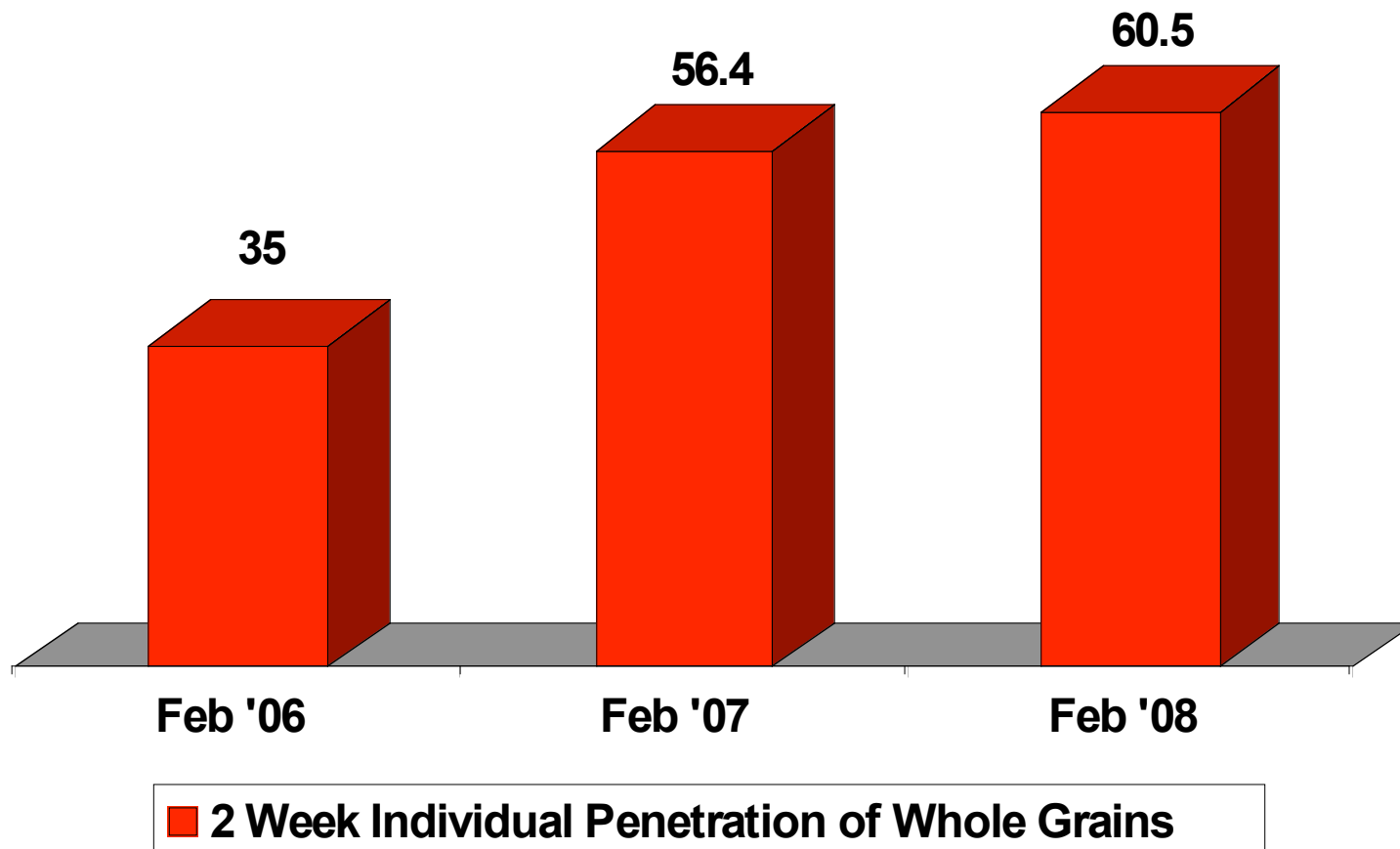
+20.0%



—●— Average Pyramid Servings Per Person

# And most people eat Whole Grains!

Percent of population that eats Whole Grains atleast once in 2 week period



# Who consumes the most Whole Grains?

## Average Daily Pyramid Servings of Whole Grains (ozs.)

0-17 YO



#4

18-34 YO



#2

35- 54 YO



#3

55+ YO



#1

# Who is driving the growth of Whole Grain consumption?

**% Increase in Average Daily Pyramid Servings of Whole Grains (ozs.) '98 to '08**

**0-17 YO**



**4%**

**18-34 YO**



**38%**

**35- 54 YO**



**23%**

**55+ YO**

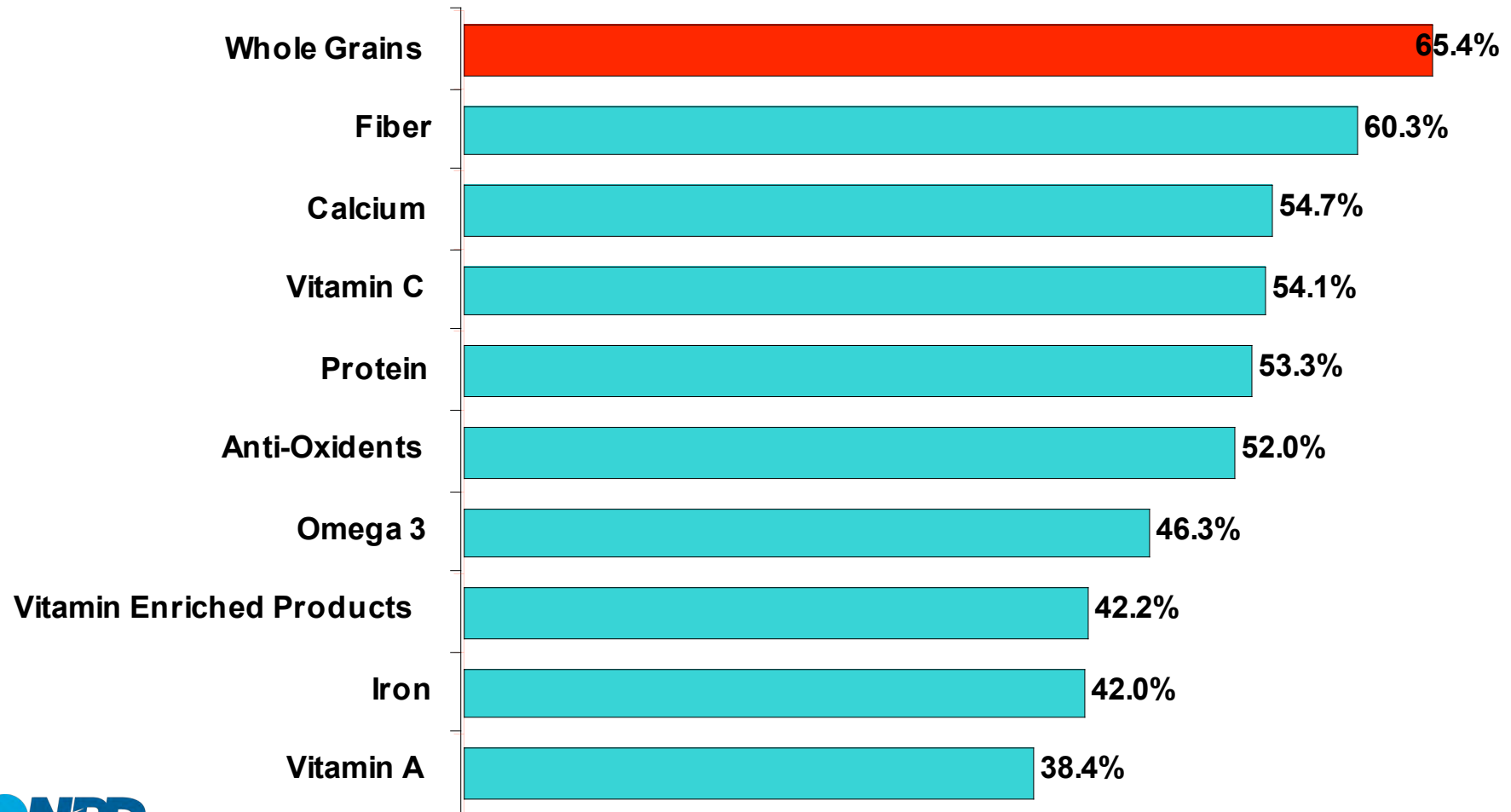


**11%**



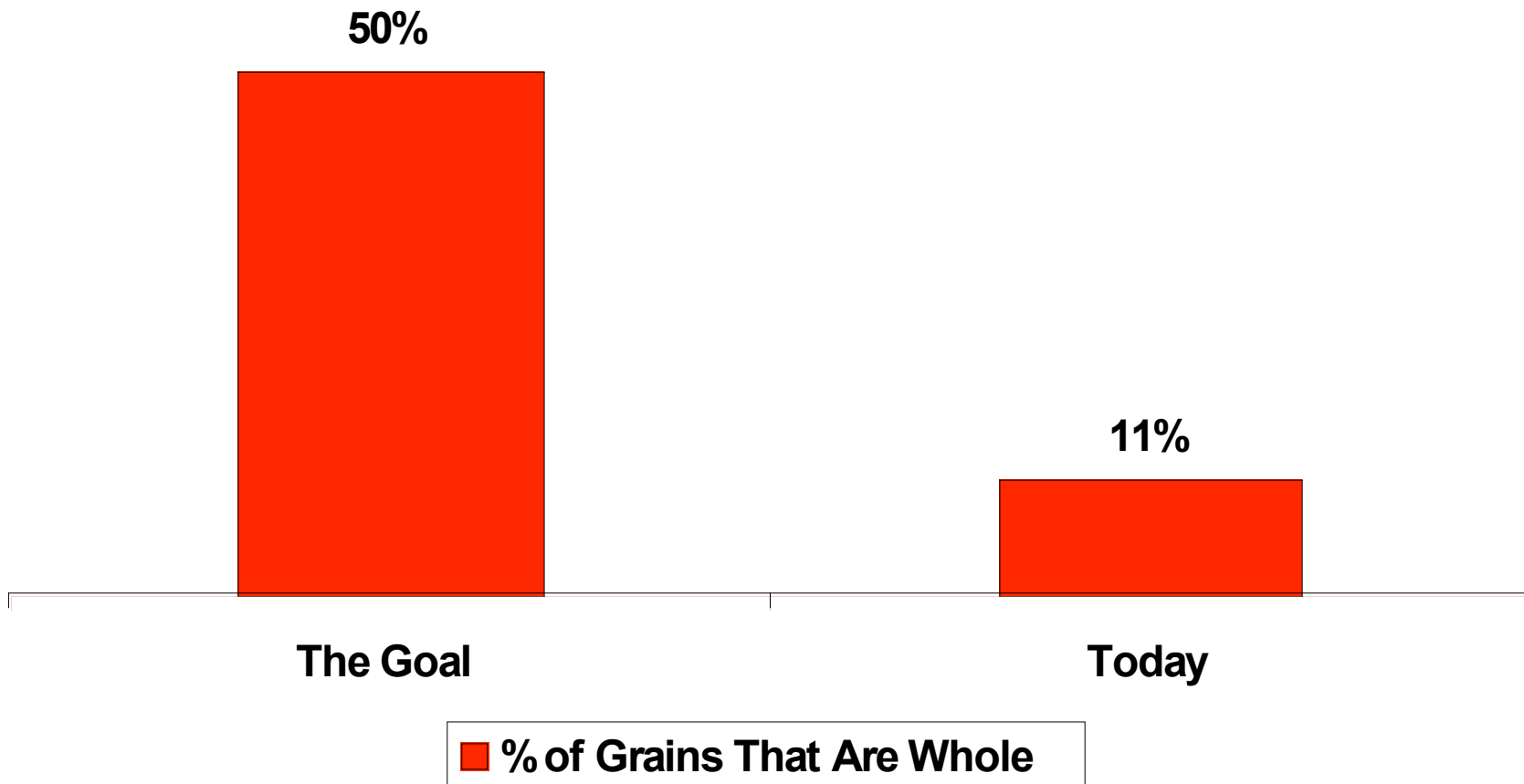
# Whole Grains is the #1 item we are trying to get more of!

*“Which, if any of these, are you trying to get more of, cut down, or avoid completely.”*

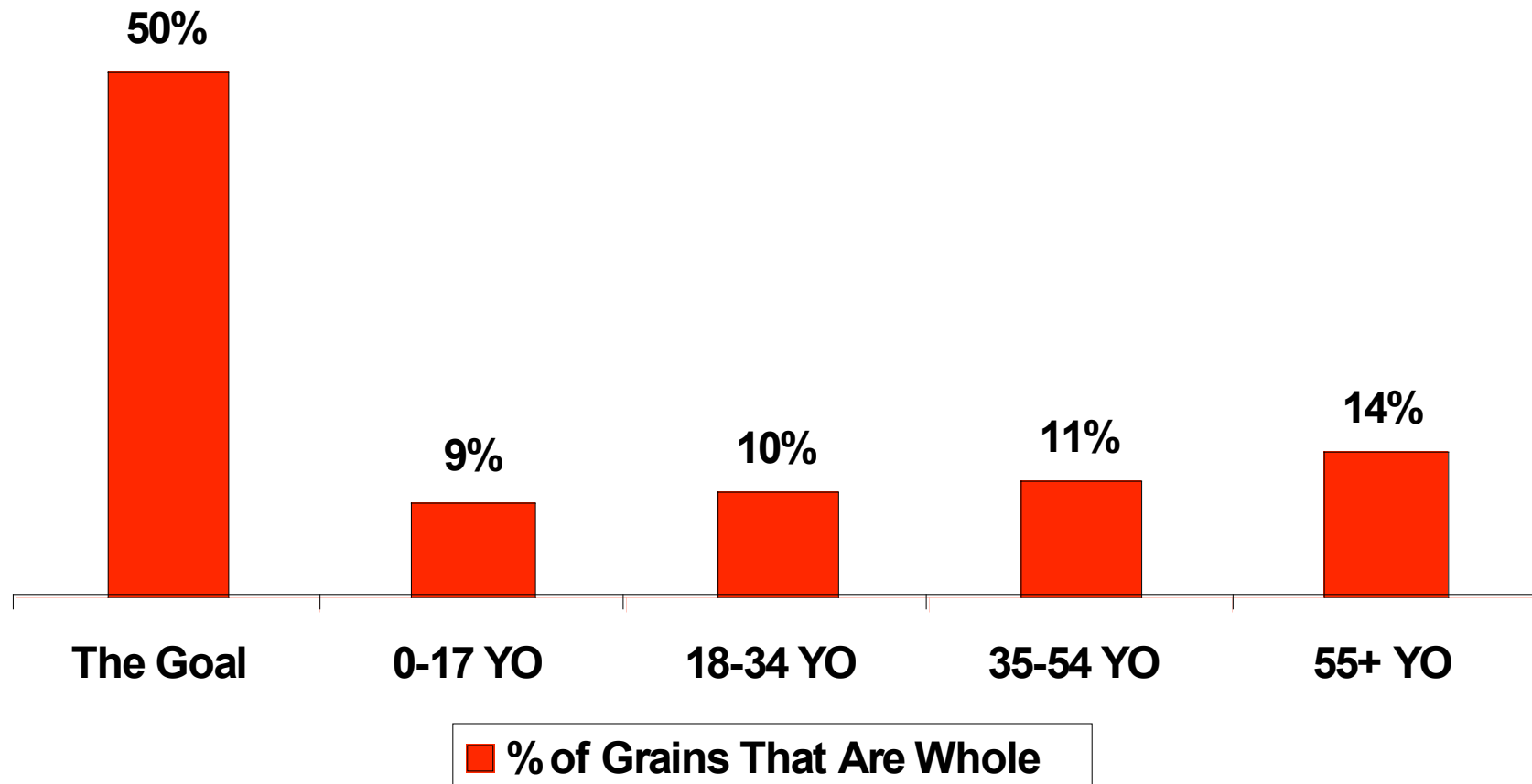


*However....*

We still have a ways to go!



# All age groups have a ways to go!



# Thoughts for the future!



*Behind Every Business Decision*

Proprietary and Confidential

## Ranked Based on Average Daily Intake

### Top Sources of Grains

1. Sandwiches
2. Bread
3. RTE Cereal
4. Pizza
5. Italian Dishes

### Top Sources of Whole Grains

1. RTE Cereal
2. Hot Cereal
3. Total Salty Snacks
4. Bread
5. Total Bars

## Ranked Based on Average Daily Intake

### Top Sources of Grains

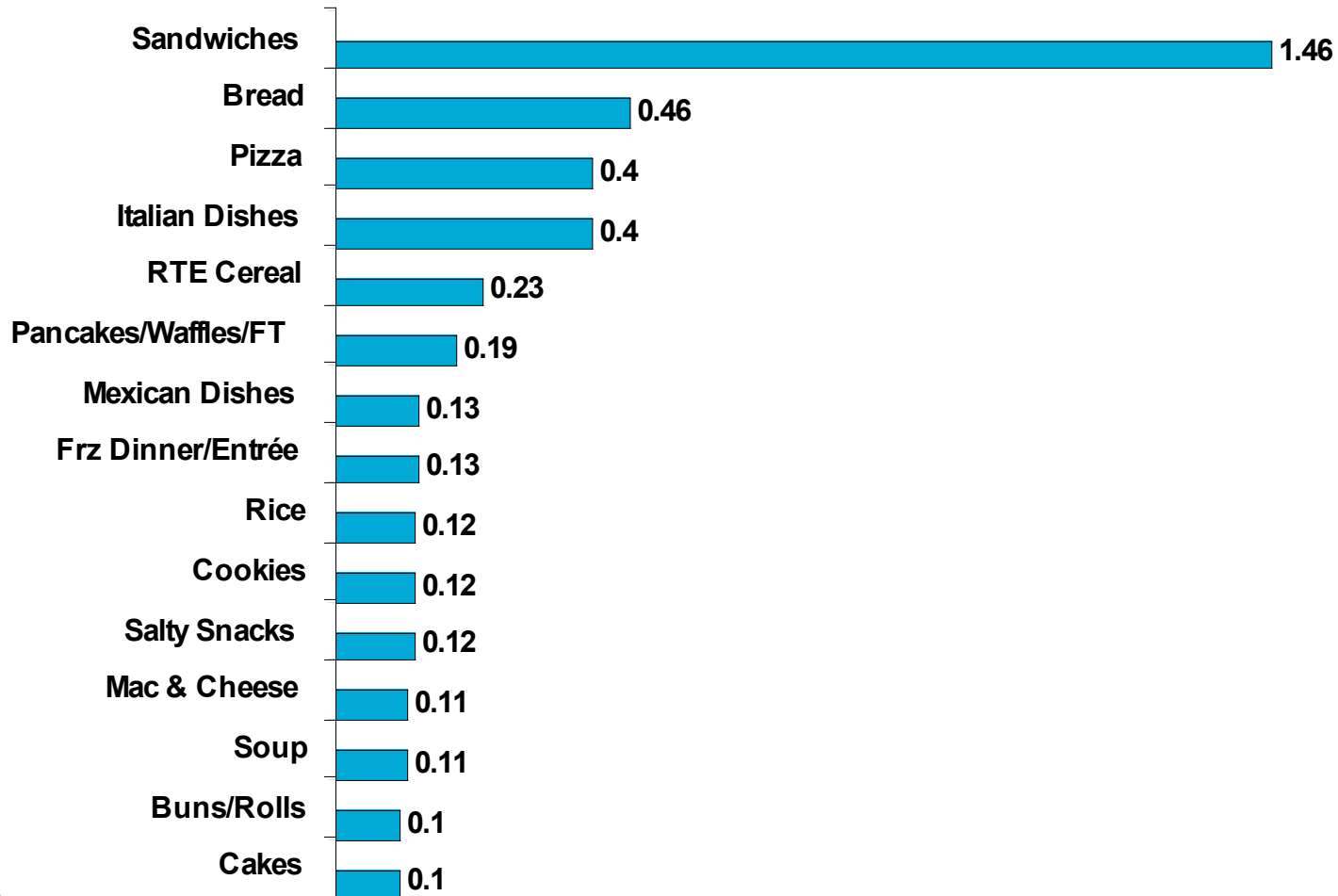
1. Sandwiches
2. Bread
3. RTE Cereal
4. Pizza
5. Italian Dishes

### Top Sources of Whole Grains

1. RTE Cereal
2. Hot Cereal
3. Total Salty Snacks
4. Bread
5. Total Bars

# The top sources of grains are the biggest gap opportunity!

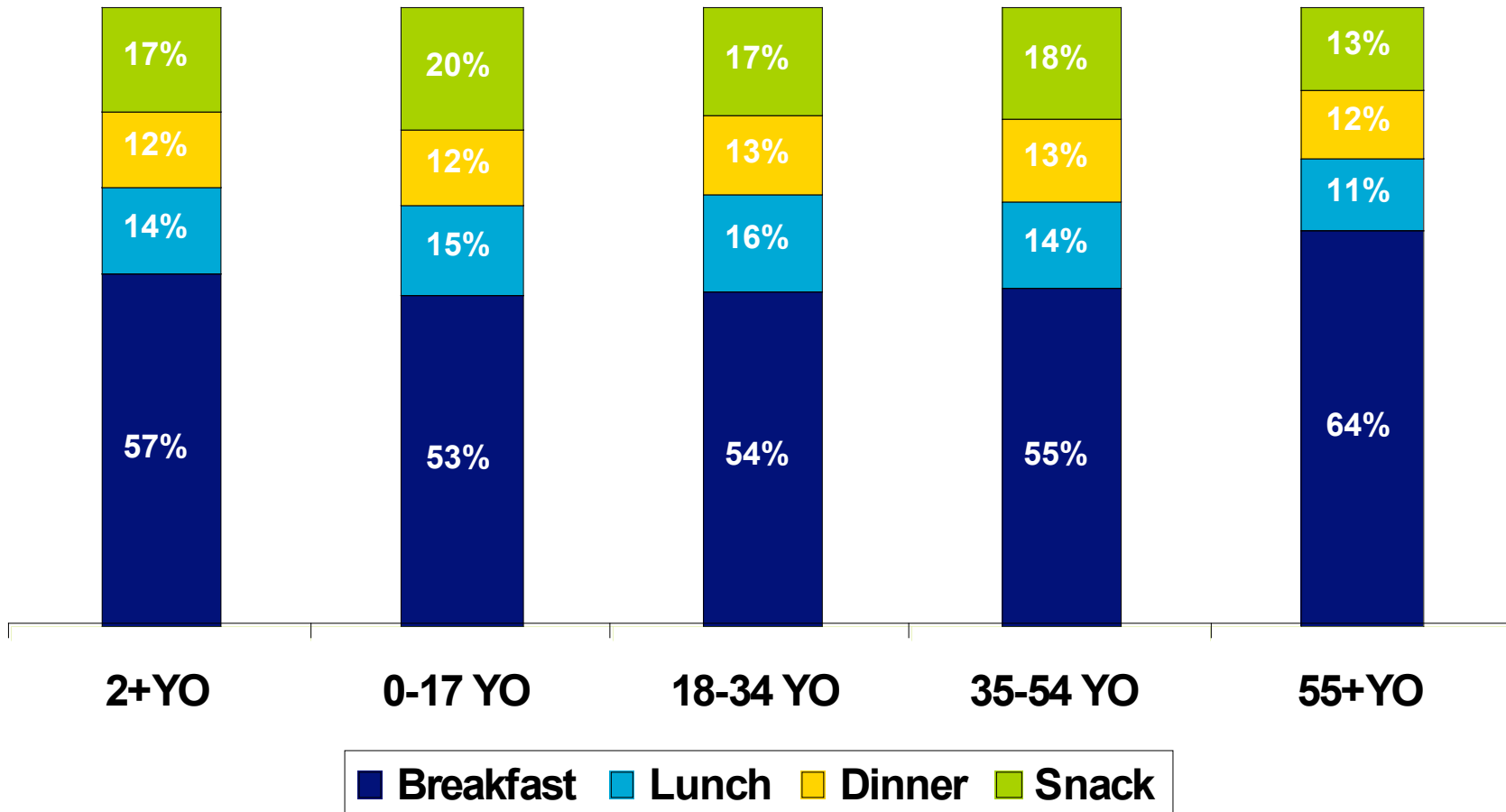
## The Top Gaps Between Total Grains and Whole Grains (Average Daily Intake of Total Grains minus Average Daily Intake of Whole Grains)





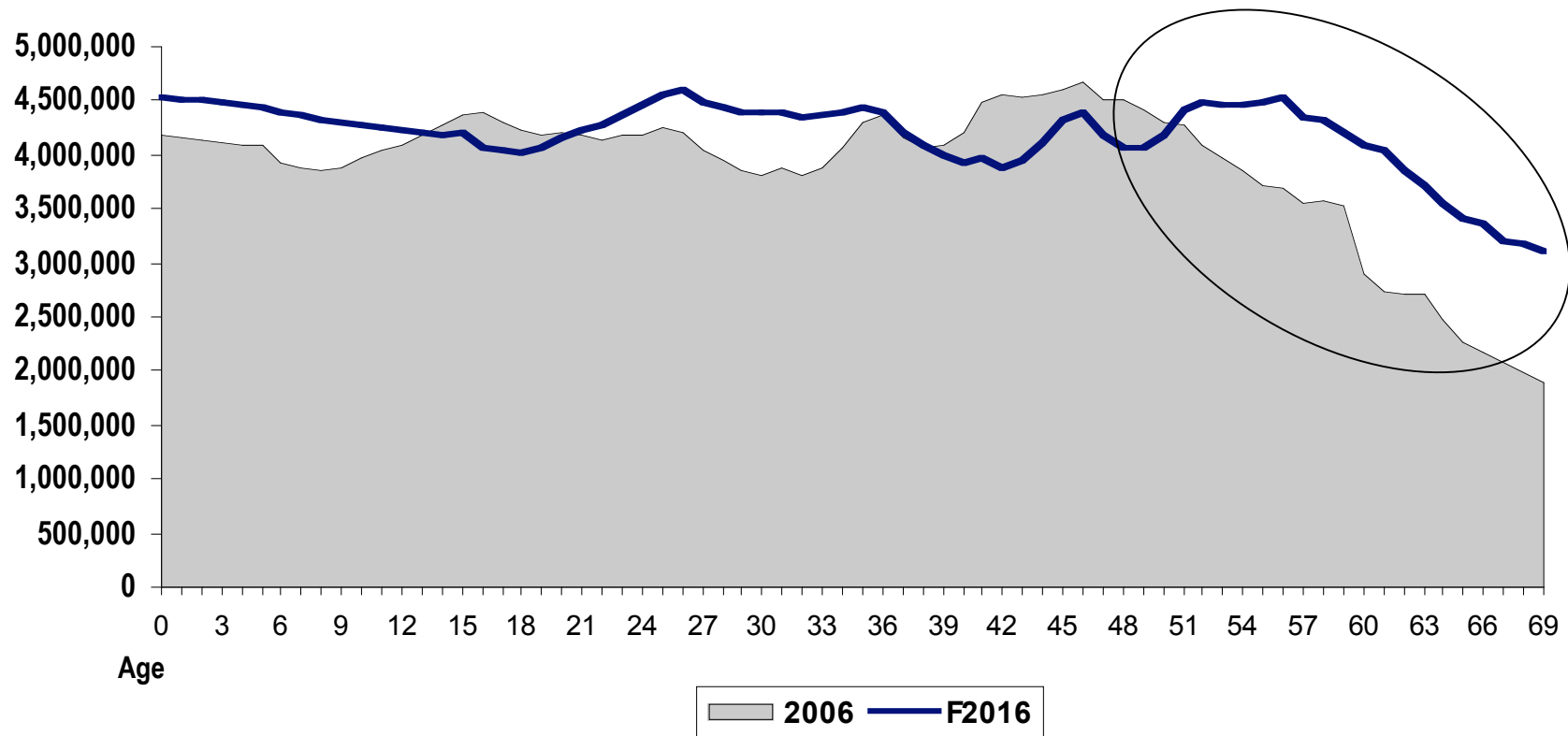
# The benefit, helping extend throughout the day!

## % of Whole Grain Eating's by Meal Occasion



# #2...Leverage the biggest demographic change!

## US Population 2006 vs F2016



Behind Every Business Decision

Source: U.S. Census Bureau Data

# Can you associate with these foods?

## Top Foods Among Adults 50+ Ranked Based on Annual Eating's Per Capita

1. Fruit
2. Vegetables
3. Sandwiches
4. Bread
5. RTE Cereal
6. Salads
7. Salty Snacks
8. Potatoes
9. Eggs
10. Soup

And remember...



## Structural Changes to be aware of...

- Structural change is slow
- Home is the primary source of meals
- We are eating more on the run
- It is and always will be about Mom
- We are always moving towards easier
- For some of the population, health is about new
- For the rest of the population, health is about health
- When thinking about pricing, we will never let the cost of food outpace our incomes
- Positioning needs to not just be about health but also about the other needs consumers are looking for

## Changes due to:

- **New** ... *we like to try new things ...but don't mistake this for a trend!*
- **Convenience** ... *we have always moved to making our lives easier!*
- **Cost** ... *We have never let food costs rise faster than our incomes!*

## But the driving force in eating habits:

- **Taste/Habits**... *this is hard to change!*

## In summary,

- We are eating more Whole Grains
- We still have a ways to go to 50%
- Remember the fundamentals

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