



# Getting Consumers to eat more whole grains: The role of policy, prices, and product availability

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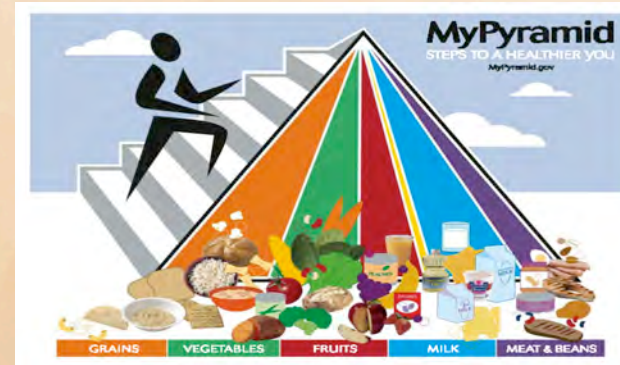
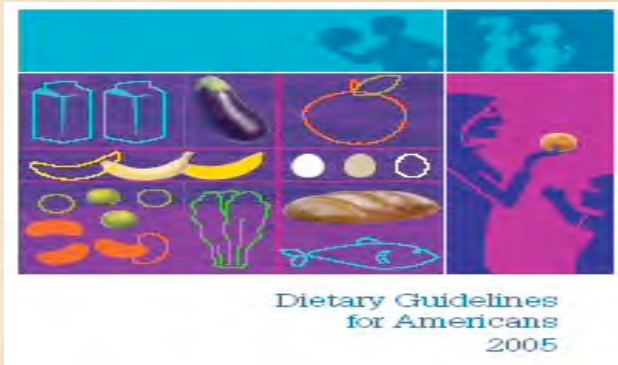
Make (at least!) Half Your Grains Whole

Alexandria, VA April 21, 2009



# 2005 *Dietary Guidelines*

- The United States Department of Agriculture and Department of Health and Human Services make dietary recommendations every 5 years

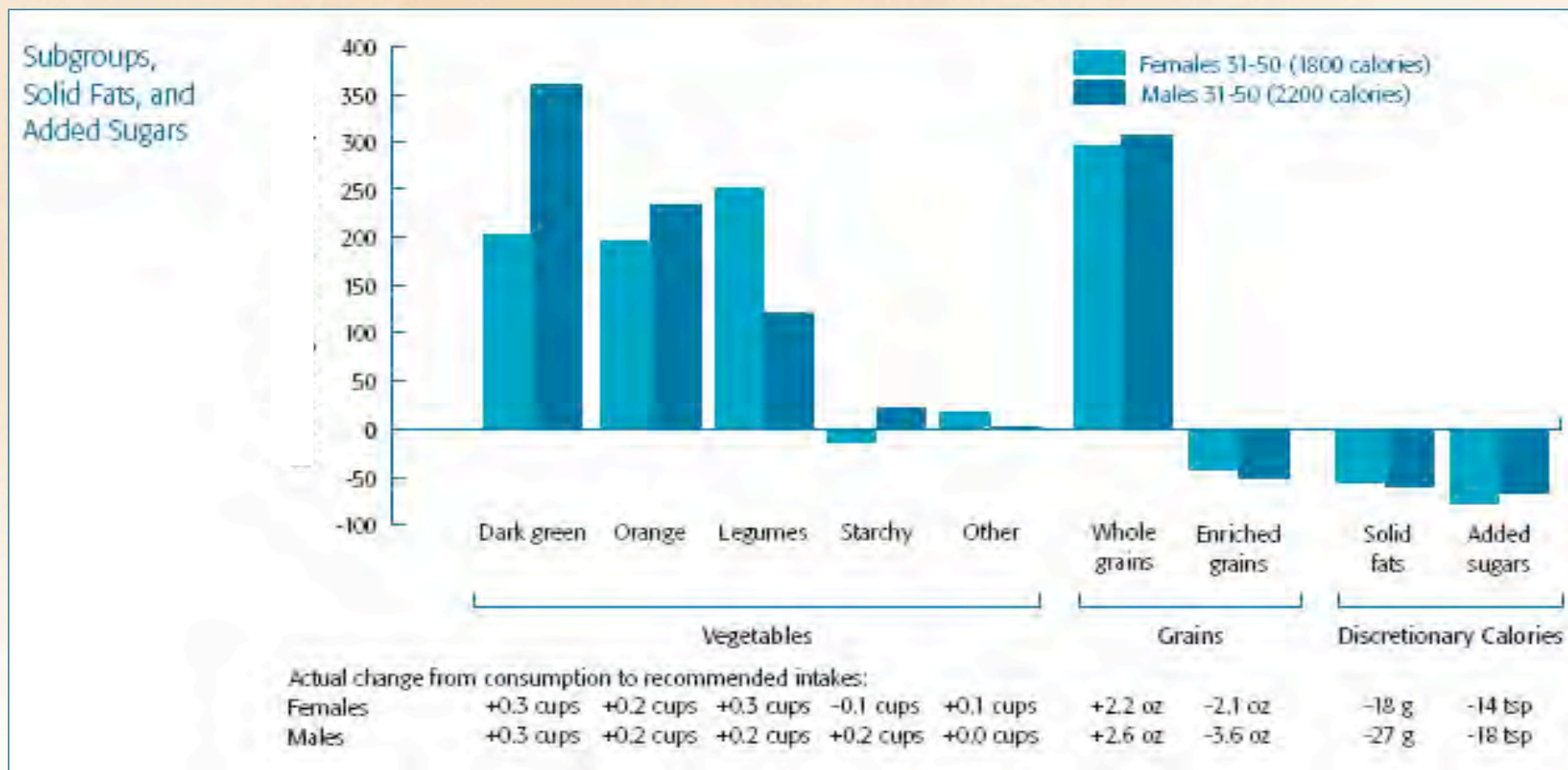


- Specific dietary recommendations for whole grains added in 2005



# How far do we have to go?

Percent change from 2001-2002 consumption needed to meet 2005 Guidelines



Source: National Health and Nutrition Examination Survey 2001-2002.





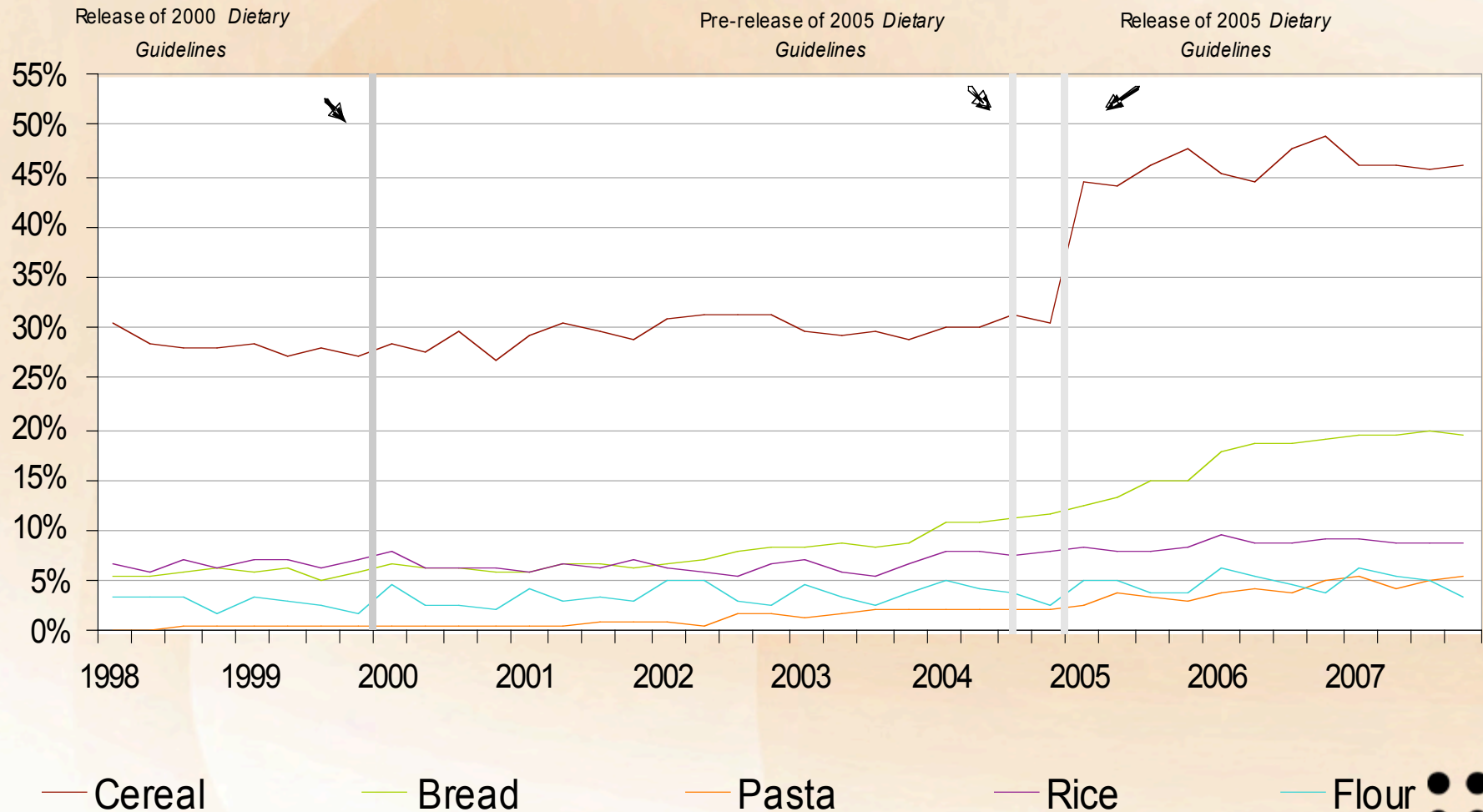
# Diets are hard to change

- 2007 IFIC study—Most Americans sampled believe weight (91%), exercise (94%), and diet (90%) influence health
- Yet we still choose diets that are out of sync with dietary guidance
- Prevalence of obesity and diet related illnesses continue to rise



# But whole grain sales did rise

## Quantity share – whole grain to total grain



Source: ERS calculation based on Nielsen Homescan data



# Main drivers of food choices

Taste



Prices and income



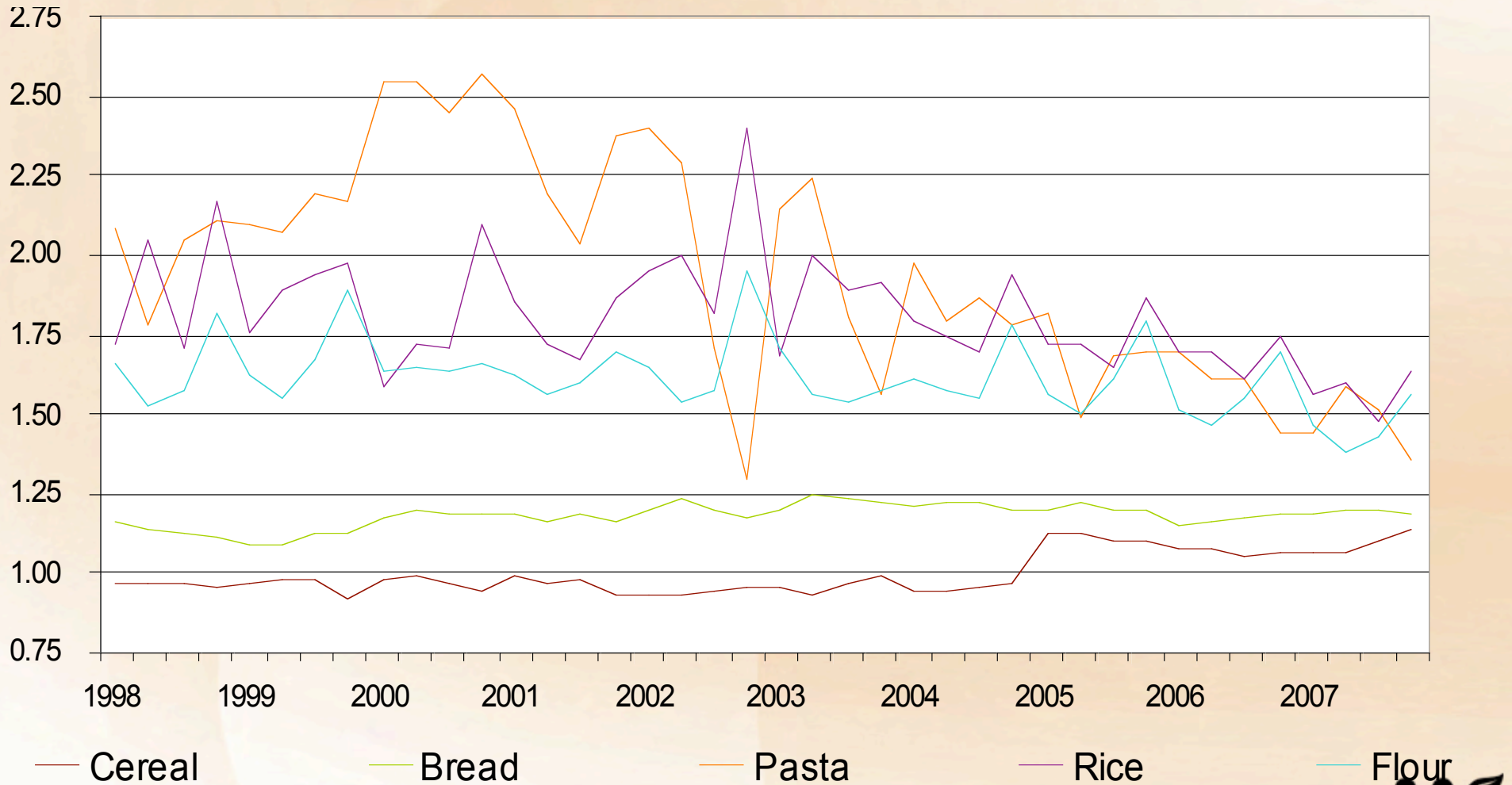
Information/health benefits

Convenience



# Trend in relative prices is mixed

Price of whole grain relative to non-whole grain product



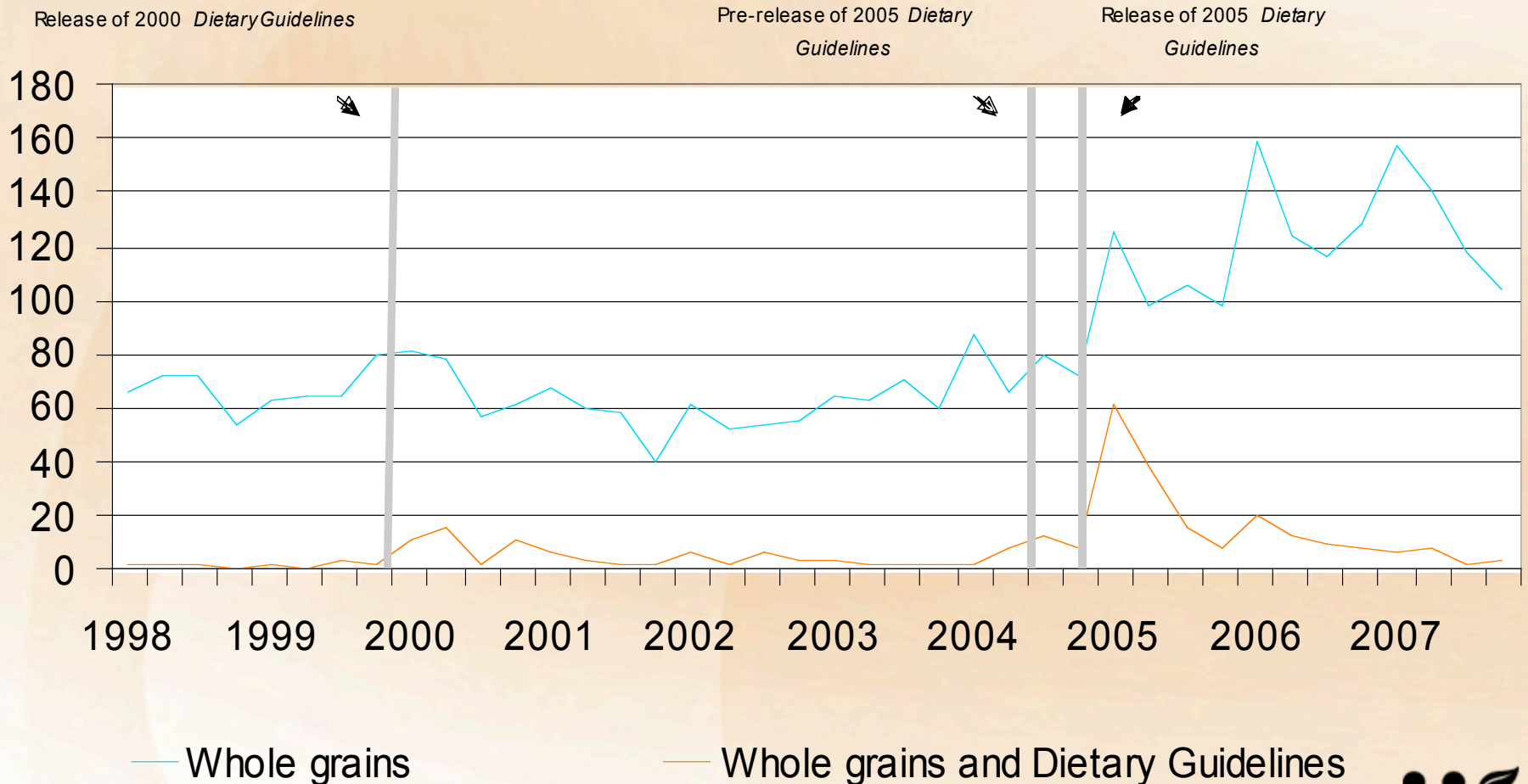
Source: ERS calculation based on Nielsen Homescan data



# Health benefits

## Whole lot of media attention

### Monthly number of newspaper articles



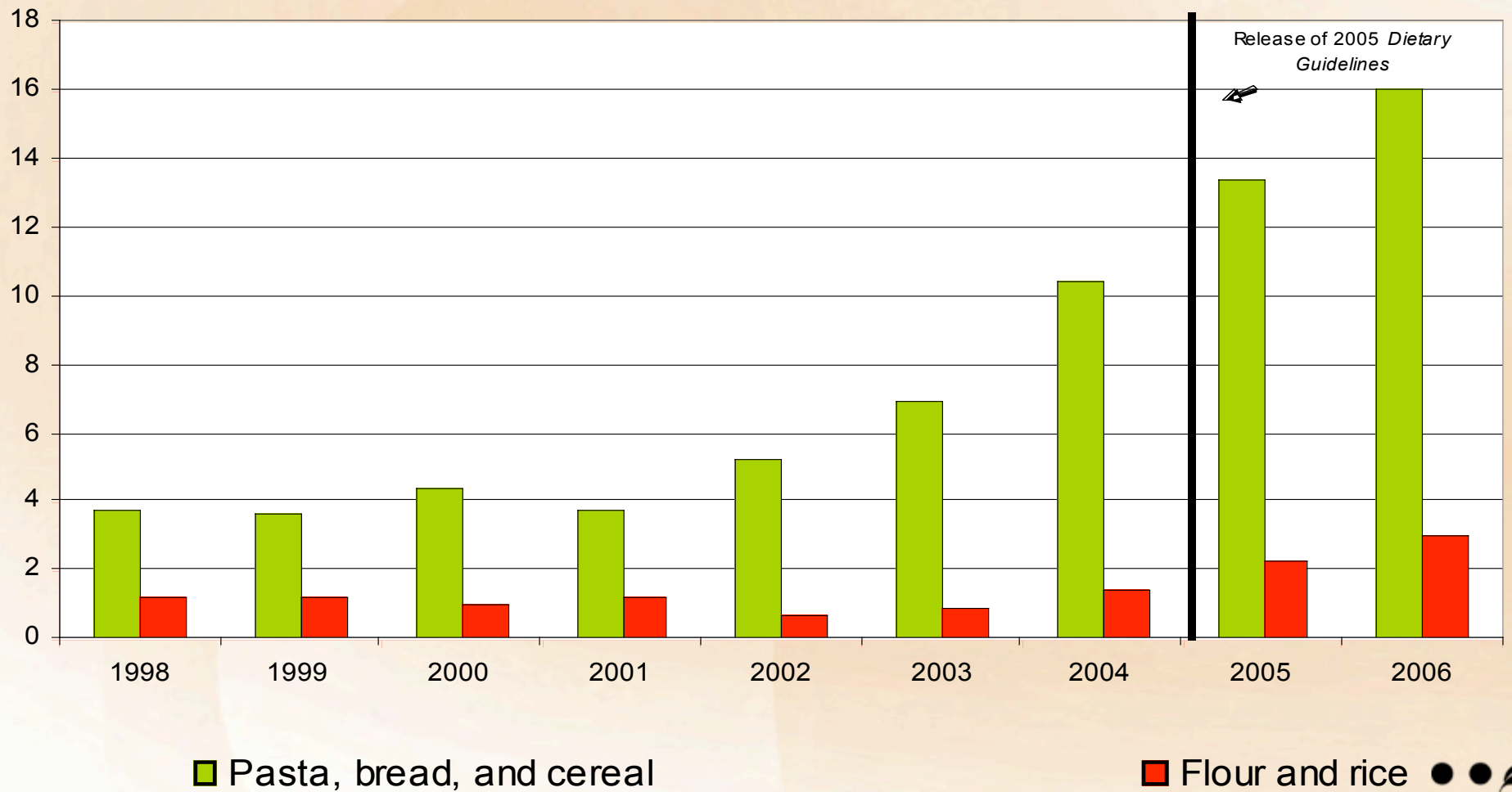
Source: Lexis-Nexis





# Increased availability and maybe convenience too

Monthly number of new product introductions



Source: Productscan data



# A closer look at changes over time

	1998-2007	1998-8/2004*	8/2004*-2007
Cereal	6.5%	1.1%	<b>7.4%</b>
Bread	14.0%	8.5%	<b>15.3%</b>
Pasta	34.7%	36.5%	26.4%
Rice	4.5%	1.4%	<b>2.9%</b>
Flour	3.0%	0.5%	<b>4.6%</b>

\* Month of pre-release of the 2005 Dietary Guidelines



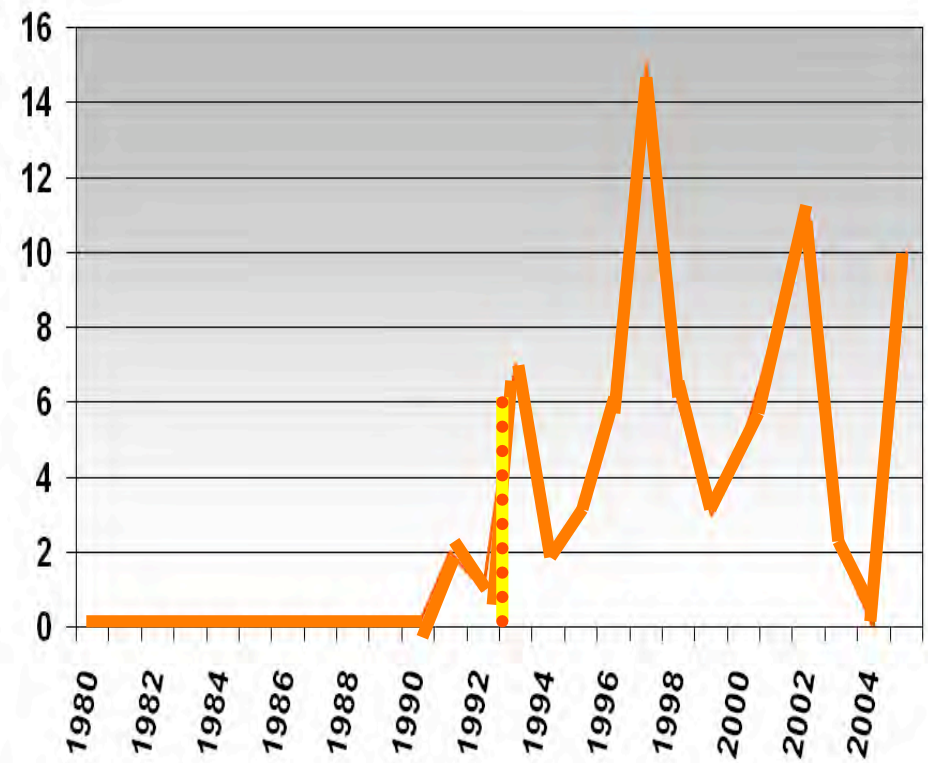
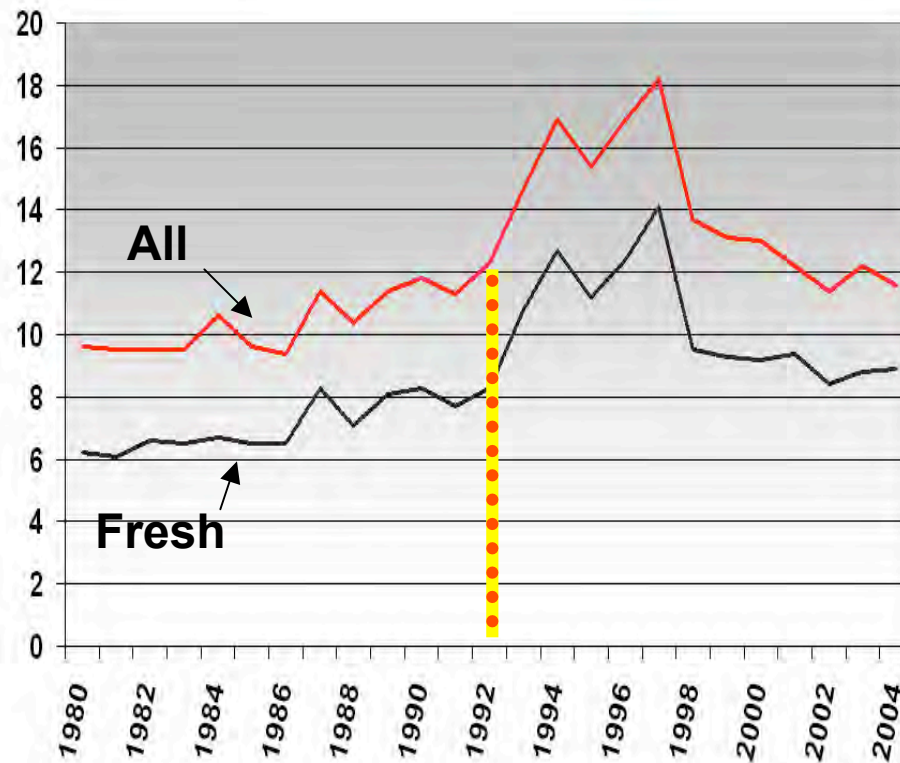
# New products and past changes

U.S. per capita food consumption  
*Carrots*

U.S. new product introductions  
*Baby Carrots*

Farm weight, pounds per capita per year

Reported Introductions



Source: ERS Food availability data

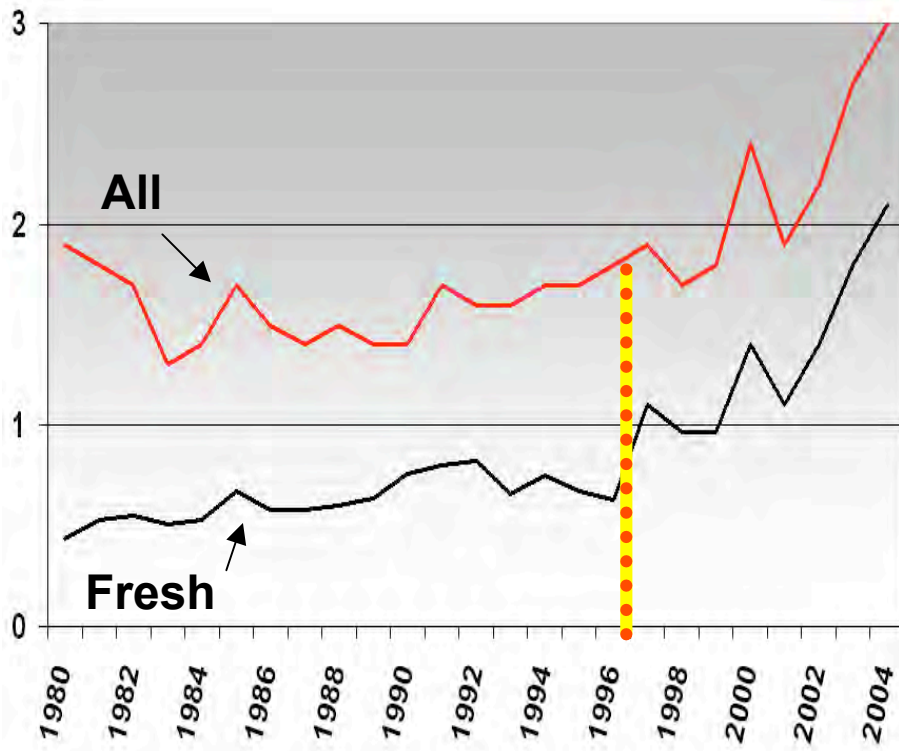
Source: Productscan data

# New products and past changes

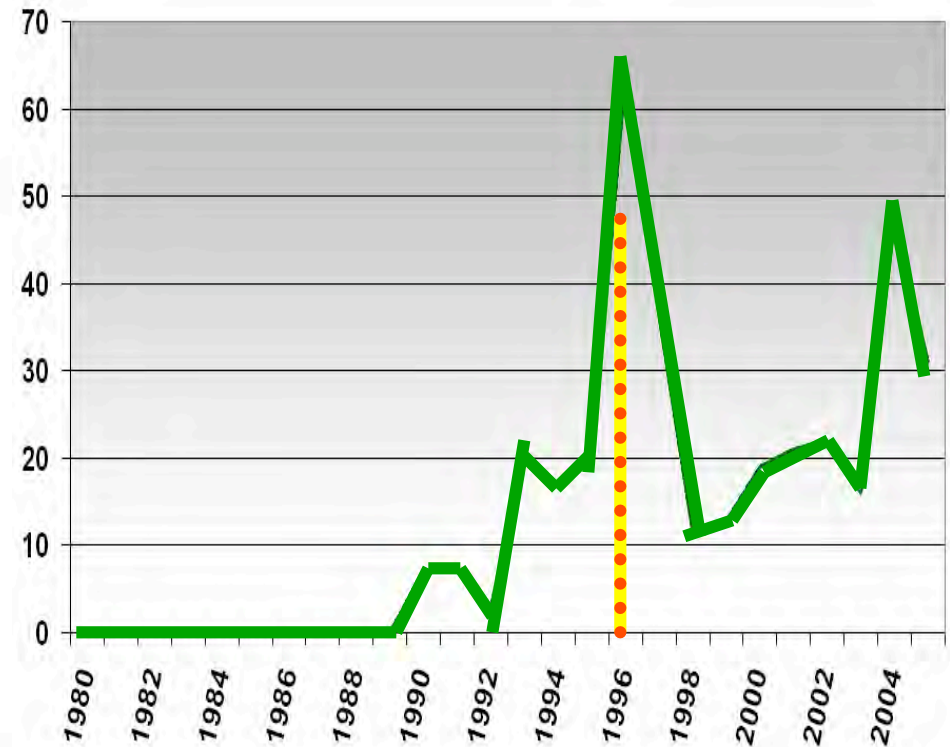
U.S. per capita food consumption  
*Spinach*

U.S. new product introductions  
*Pre-washed spinach*

Farm weight, pounds per capita per year



Reported Introductions



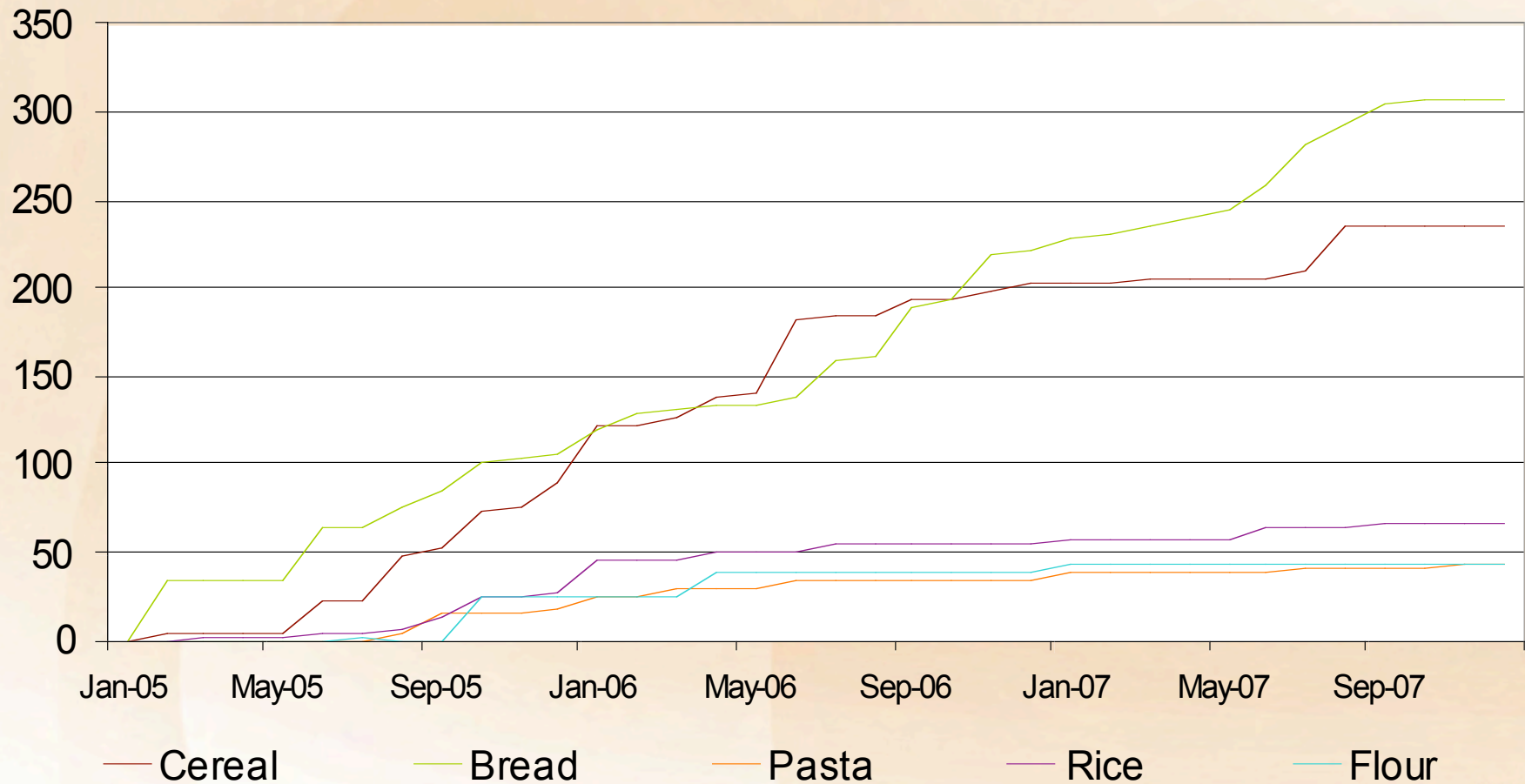
Source: ERS Food availability data

Source: Productscan data



# More products with “Whole Grain” seal

Total number of products with “whole grain” seal

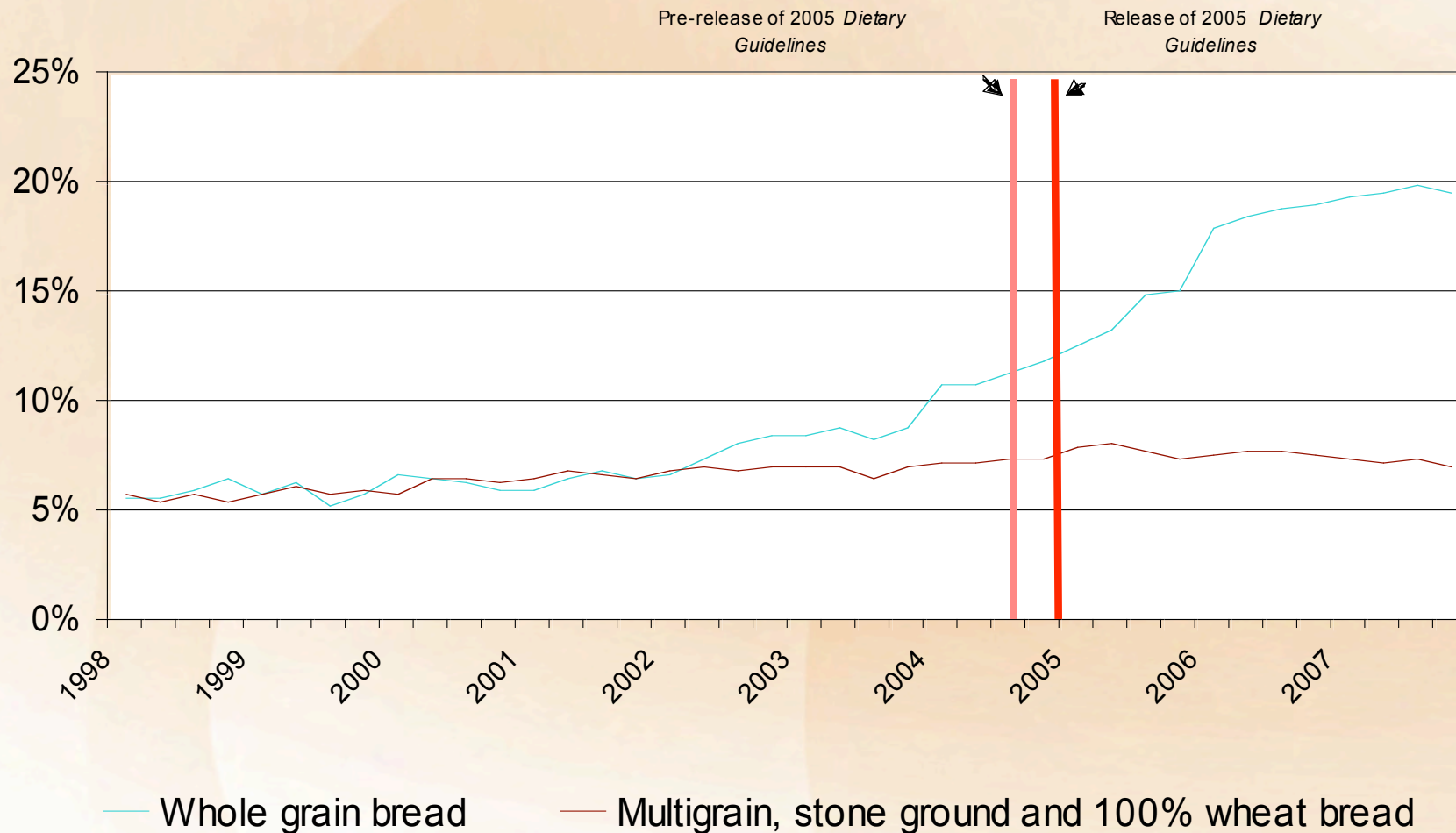


Source: Whole grain council



# But multigrain sales have not changed

Quantity share – whole or multi grain to total grain

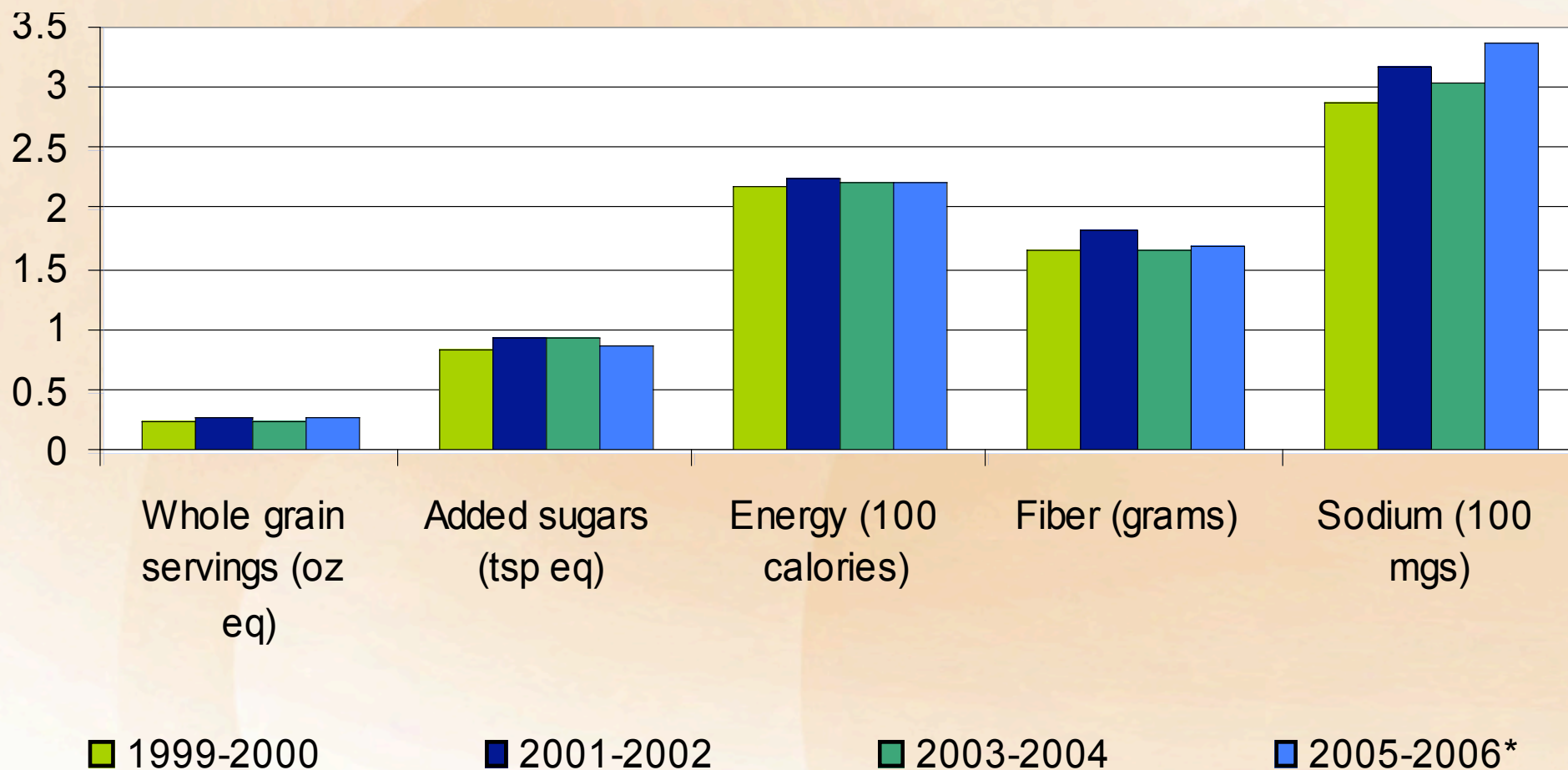


Source: ERS calculation based on Nielsen Homescan data



# Do increased sales affect intake?

Average amount in bread products (per 100 grams) among adults 20 and over



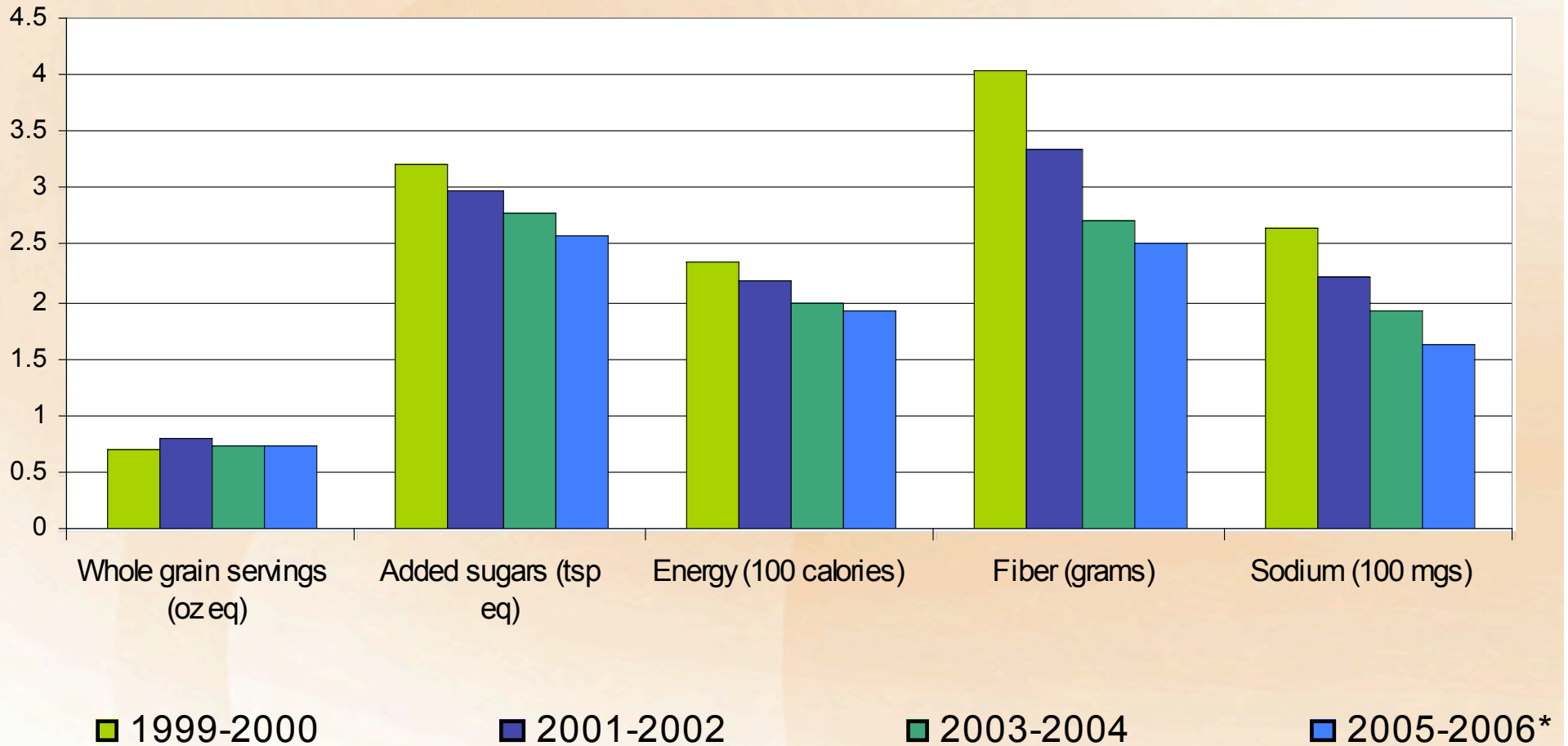
Source: ERS calculation of NHANES data

\*Mypyramid equivalent database, v2



# Do increased sales affect intake?

Average amount in RTE cereal (per 100 grams) among adults 20 and over



Source: ERS calculation of NHANES data

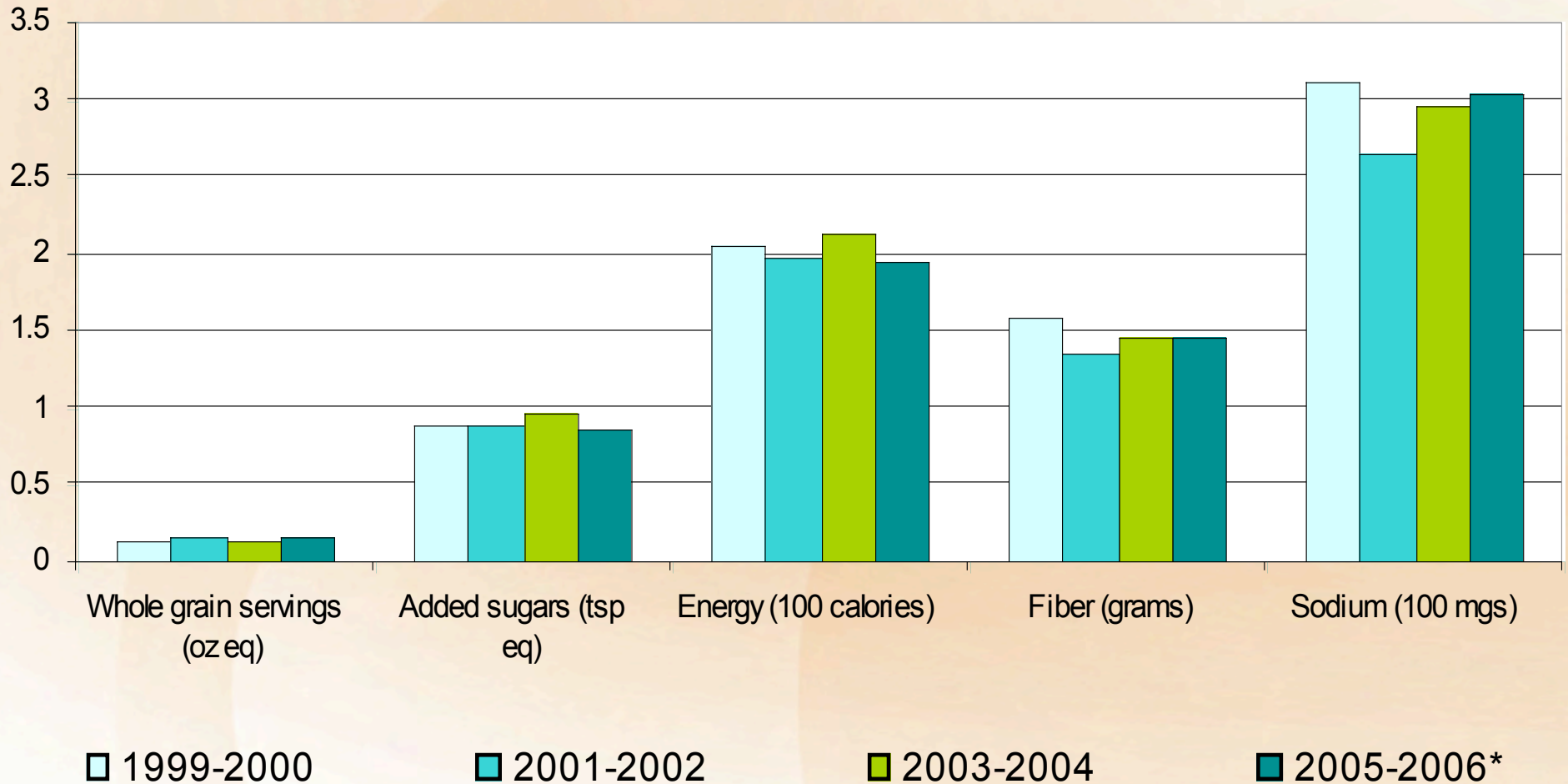
\*Mypyramid equivalent database, v2





# Maybe for kids?

Average amount in bread products (per 100 grams) among children ages 2-19



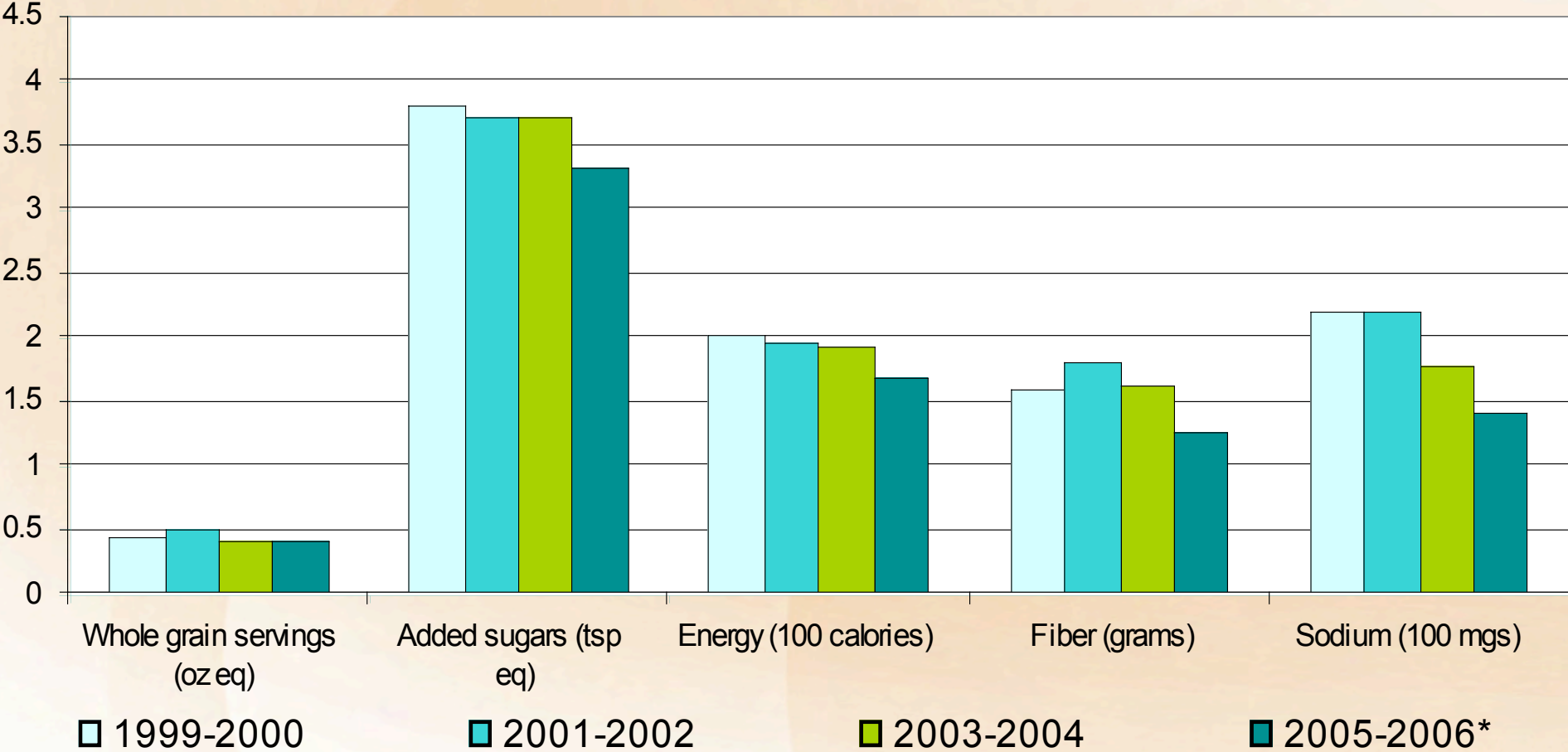
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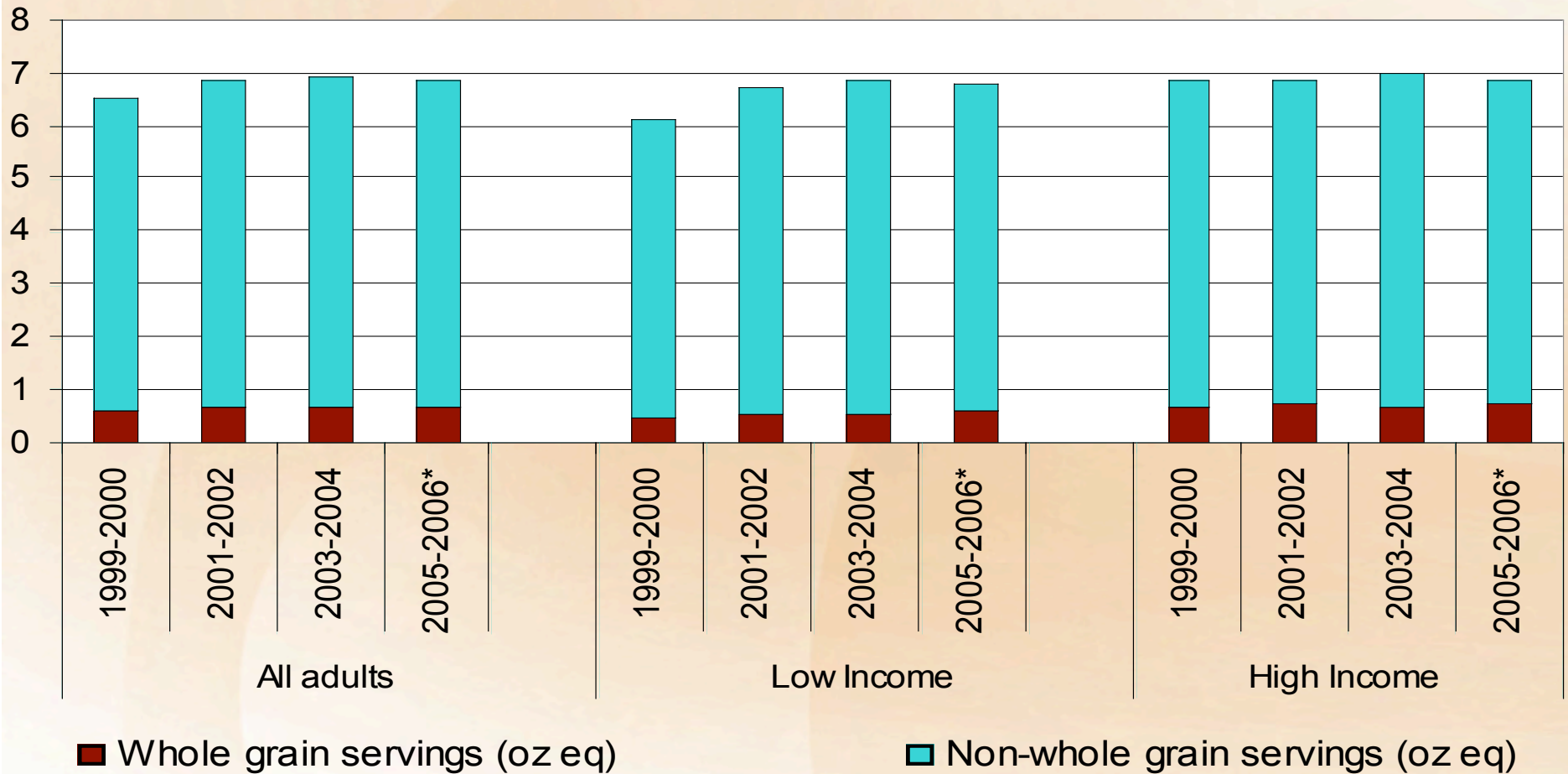
Source: ERS calculation of NHANES data

\*Mypyramid equivalent database, v2



# We still have a ways to go

Servings per day



Source: ERS calculation of NHANES data

\*Mypyramid equivalent database, v2



# In summary

- Whole grain product purchases have increased
  - more pronounced among value added products (bread, RTE cereal and pasta)
  - new product introduction more pronounced among these categories as well
- Whole grain recommendation in 2005 *Dietary Guidelines* likely provided additional incentives for reformulations
- Continued room for ambiguous claims, however, may have tempered how effective these recommendations have been at increasing intake

