

# Making Half Whole at Retail

**Whole Grains Conference  
Alexandria, VA  
April 21, 2009**

**Paulette J. Thompson, MS, RD  
Stop & Shop Supermarkets/Giant Food LLC**

---



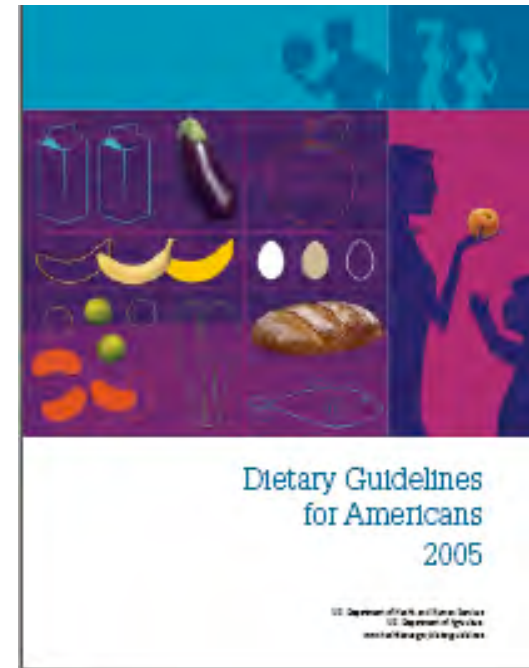
## 2005 Dietary Guidelines for Americans

---

The 2005 Dietary Guidelines encourages Americans to consume more whole grains -- at least 48 grams of whole grains a day.

“Choose fiber-rich fruits, vegetables, and whole grains often.”

“Consuming at least half the recommended grain servings as whole grains is important, for all ages, at each calorie level, to meet the fiber recommendation.”



## Consumers Want Whole Grains ...

---

- **62% of shoppers said they were looking for products marked with Whole Grain (Shopping and Health 2004)**
- **48% want foods that are high in fiber (ConAgra Foods Choice Driver Study)**
- **88% of consumers said they have used whole grains the following in the past year in 2008 compared to 79% of consumers in 2002. (National Marketing Institute, NMI, 2009)**
- **Consumers want to add more fiber, whole grains, low fat foods, antioxidants, calcium, vitamin C, D and omega-3s and want to reduce cholesterol, fat (total, saturated and trans), sugar sodium, partially hydrogenated oils, HFCS. (Source: IPSOS Global Nutrition Study, 2008)**
- **Consumers are looking to add more calcium, antioxidants, fiber and whole grains into their diet. (Wellness Lifestyle Insights 2007 by the Hartman Group, Inc.)**
- **Shoppers increasing their use of healthy products over the past two years have increased their use of whole grains, fruits and other ingredients. (HealthFocus, 2007)**
- **Consumers, especially Americans, see fiber and whole grain intake as a means of boosting health. (Datamonitor, 2008)**



# BUT....

---

- **According to the 2003-2004 National Health and Nutrition Examination Survey (NHANES), only 4% of Americans get enough whole grains.**
- **54% of mothers say their children prefer white bread (Gallup 2004)**



# Manufacturer Response

---

## Manufacturers Have Responded with More Whole Grain Products

### DataMonitor Product Scan (Provided by Kellogg Co.)

- Product launches with whole grain and fiber have increased 579.2% from 2000 to 2007
- Since 2000, breakfast cereals and bread products showed the most product launches with whole grains

### Neilson LabelTrends

- 4% Increase in Whole Grain claims on packages in 2008
  - 29% Increase over last 4 Years
- 7% Increase in Multi Grain claims on packages in 2008
  - 55% Increase over last 4 years



# Retailer Response: Stocking the Shelves

---

## Category Managers:

- Track the trends
- Nutritionist recommendations
- Customer Product Requests

## Corporate Brands:

- Track the trends
- Follow manufacturer products

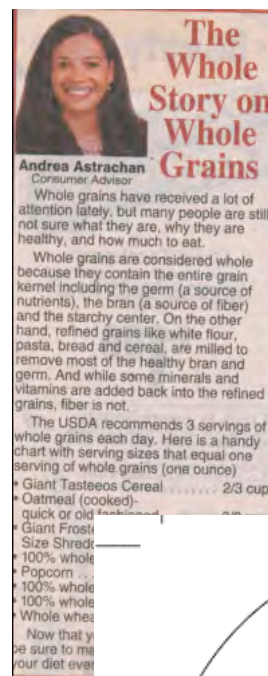
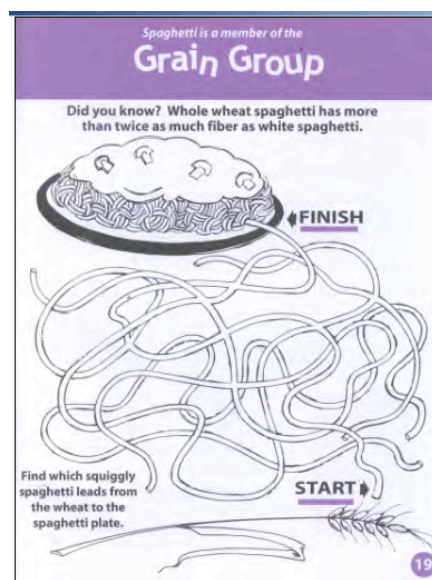


# Retailer Response: Consumer Education

## Consistently Deliver the Message!!

### Consumer Advisor Columns

- In-store radio
- In-store signs
- School Tour Activity Book

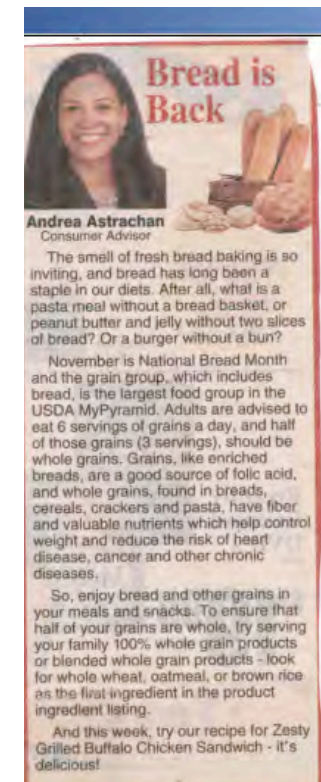


# Tie To Merchandising: Bread is Back Campaign

Partnership with Grain Foods Foundation – November 2006

15 % Lift in Sales!

- Wobblers in Bread Aisle
- Recipe in Sales Circular
- Consumer Advisor Column





## Help Consumers with Meal Solutions

Whole grains now always listed as preferred grain choice in recipes.

- Weekly recipe featured in sales circular
- Recipes included in mailers
- Recipes included in consumer brochures
- Recipes archived on website



# Make It Easy




**A simple way to know it's healthy**

- Easy**  
Just look for the Healthy Ideas symbol on more than 3,000 items throughout the store.
- Truly healthy**  
Healthy foods have less fat, saturated fat, and sodium, and are a good source of at least one nutrient.
- Expert**  
Developed by a team of nutritionists, and reviewed by an advisory panel of physicians and nutrition experts utilizing USDA and FDA guidelines.
- See for yourself**  
Visit [stopandshop.com](http://stopandshop.com) for more information and the complete Healthy Ideas criteria.




**Stop & Shop**  
For more information visit [stopandshop.com](http://stopandshop.com)

Look for the **Healthy Ideas symbol** throughout the store when you shop. Foods that wear this symbol meet strict criteria for these important nutrients:

<b>More*</b>		<b>Less</b>
Fiber		Fat
Protein		Saturated Fat
Vitamin A		Trans Fat
Vitamin C		Cholesterol
Calcium		Sodium
Iron		Sugar**

**healthy ideas™**

\*At least 10% daily value of one of the nutrients listed. Fresh or single ingredient fruits and vegetables are exempt from a nutrient requirement.  
\*\* Little or no added sugar is a criteria in appropriate categories.

For complete criteria, visit [stopandshop.com](http://stopandshop.com)

**Exclusively at Stop & Shop**

SB PUFFED WHEAT 6 OZ

<b>UNIT PRICE</b> \$4.51 PER POUND	<b>RETAIL PRICE</b> \$1.69 6OZ	 <b>healthy ideas™</b>
000003 001	02691 296 12	

SB PUFFED WHEAT 6 OZ

<b>UNIT PRICE</b> \$4.51 PER POUND	<b>RETAIL PRICE</b> \$1.69	 <b>healthy ideas™</b>
000003	02691 296 12	



# Healthy Ideas- Healthy Grains



- Based on FDA/USDA Healthy Regulations
- Criteria require 10% of DV for one nutrient (most grains qualify for either iron or fiber)
- No specific whole grain requirement – pass if they have enough fiber

666 UPCs for bread were filtered

## Whole Grain on Package

251 rated

186 passed or 74%

More whole grains qualify than refined

## Refined

377 refined rated

89 passed or 24%



## What foods are in the grain group?

Any food made from wheat, rice, oats, cornmeal, barley or another cereal grain is a grain product. Bread, pasta, oatmeal, breakfast cereals, tortillas, and grits are examples of grain products.

Grains are divided into 2 subgroups, **whole grains** and **refined grains**.



# Are They Selling?

---

## Overall

- Strong Growth at Stop & Shop/Giant (outpacing Rest of Market)
- Both unit growth and sales growth

## Cereal

- Leading Category in Whole Grains

## Bread

- Whole Wheat/Multi-grains sales increased 3.4% in last 52 weeks
- 2.35% unit increase
- White bread sales conversely have declined 4.5%
- Whole Wheat/Multi-grains now have the largest % share of unit sales at Stop & Shop (outpacing rest of Market)

## Pasta

- Stop & Shop carries 58 Whole Grain, Whole Wheat or Multi-grain items
- More items than Competitive Market
- This segment grew buyers in Stop & Shop/Giant
- Buyers of “healthy” pasta have average \$ basket double of “non-healthy”
- Whole grain pasta sales increase over 20% per year since 2005
- Regular dry pasta sales flat from 2005 to 2007



## Summary

---

Consumers are seeking whole grains and buying whole grains.

Retailers need to:

- Continue to Drive the Message
- Continue Product Innovation
- Help with Meal Solutions

