



Using Consumer Insights to Drive Whole Grain Demand: Findings from the 2025 Whole Grain Consumer Insights Survey

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Disclosures

- Caroline Sluyter is an employee of Oldways, the 501(c)3 nonprofit that founded and runs the Oldways Whole Grains Council
- No commercial support was received for this presentation
- We received sponsorship from the Artisan Grain Collaborative (a WGC member) for the local grains section of the survey report and collaborated with the University of Minnesota on some of the statistical analysis for that report



Housekeeping

- Attendees will receive an email within ONE WEEK with the **slides**, and **recording**
- This webinar has NOT been approved for CPEU credit
- Please submit any questions using the Q&A function in Zoom

About Oldways

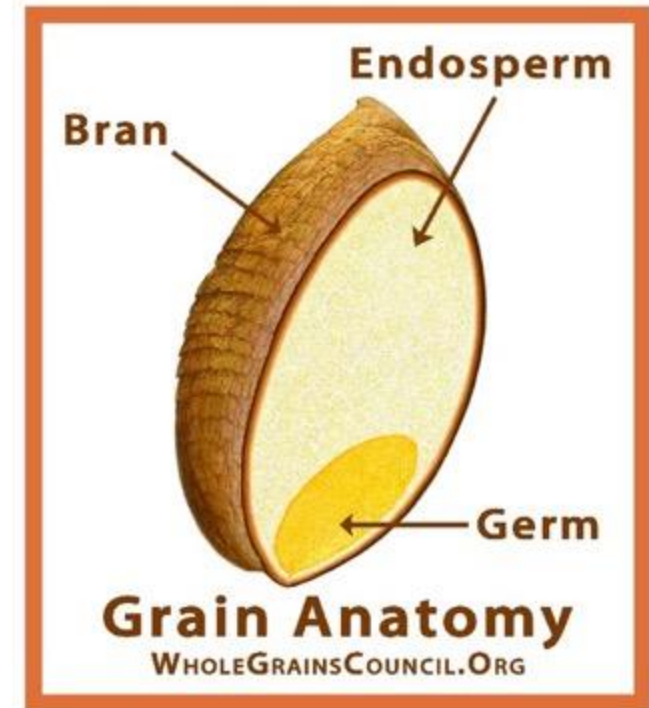
- **Our Vision**
A healthier, happier life through cultural food traditions.
- **Our Mission**
We inspire people to embrace the healthy, sustainable joys of the old ways of eating.
- **Best Known for**
Creating the Mediterranean Diet Pyramid and other Heritage Diet Pyramids, Creating the Whole Grain Stamp, Culinary Travel



About the Oldways Whole Grains Council

Our three-part mission:

- To help consumers find whole grain foods and understand their health benefits
- To help manufacturers and restaurants create delicious whole grain foods
- To help the media write accurate and compelling stories about whole grains



The Whole Grain Stamp Program



100% OF THE GRAIN IS WHOLE GRAIN



50% OR MORE OF THE GRAIN IS WHOLE GRAIN



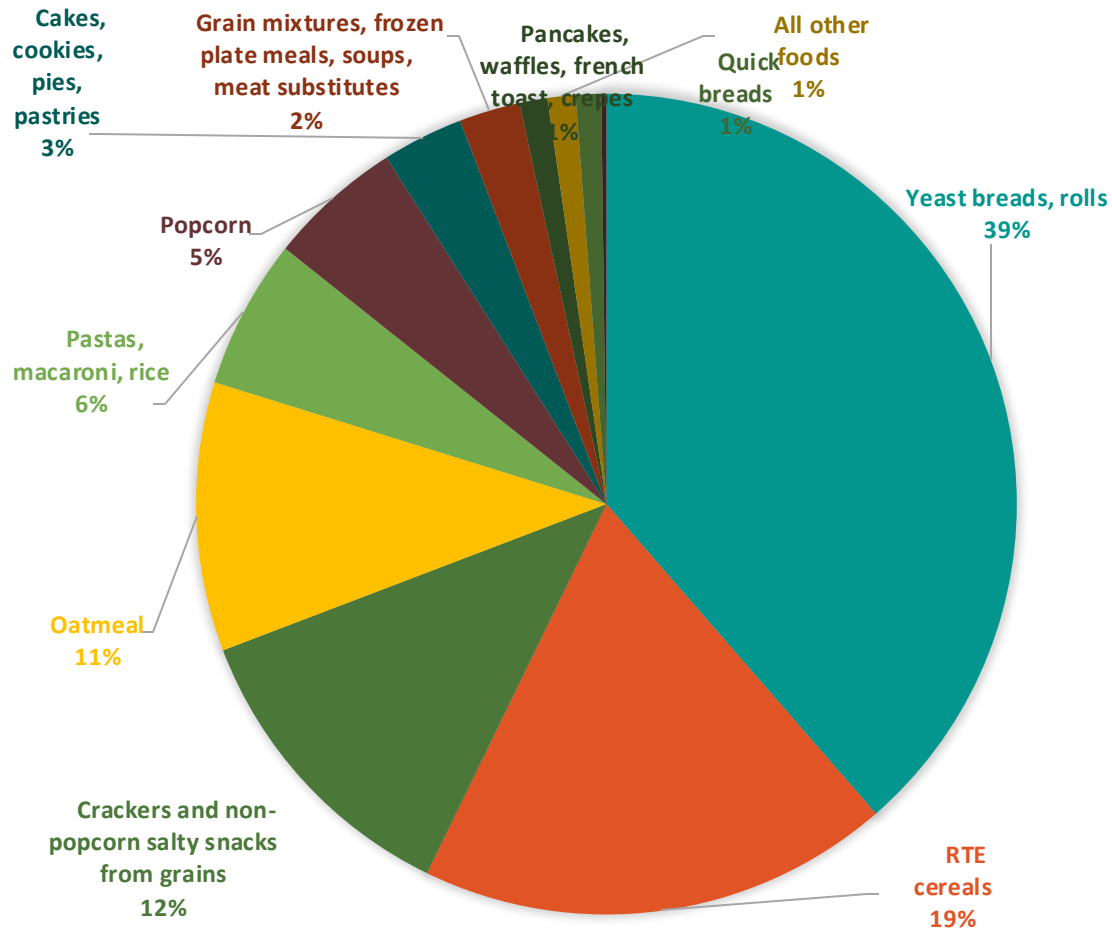
EAT 48g OR MORE OF WHOLE GRAIN DAILY

- ALL grain is whole grain
- Minimum of 16g whole grain per serving
- At least 50% of grain is whole grain
- Minimum of 8g whole grain per serving
- More refined grain than whole grain
- Minimum of 8g whole grain per serving

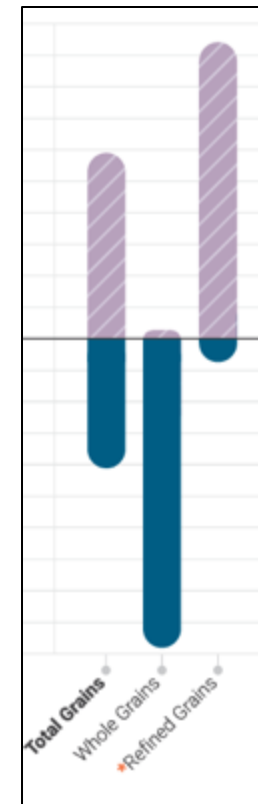
No product with less than 8g of whole grain per serving can use the Whole Grain Stamp, so consumers can be confident that they are getting **at least a half serving of whole grain** from any product bearing the Stamp.

Setting the Stage: Existing Whole Grain Data

Bread and cereal are the main sources of whole grain in US diets



98% of Americans are falling short of recommended whole grain intake (2020-2025 DGA)



About Our Survey and Its Demographics

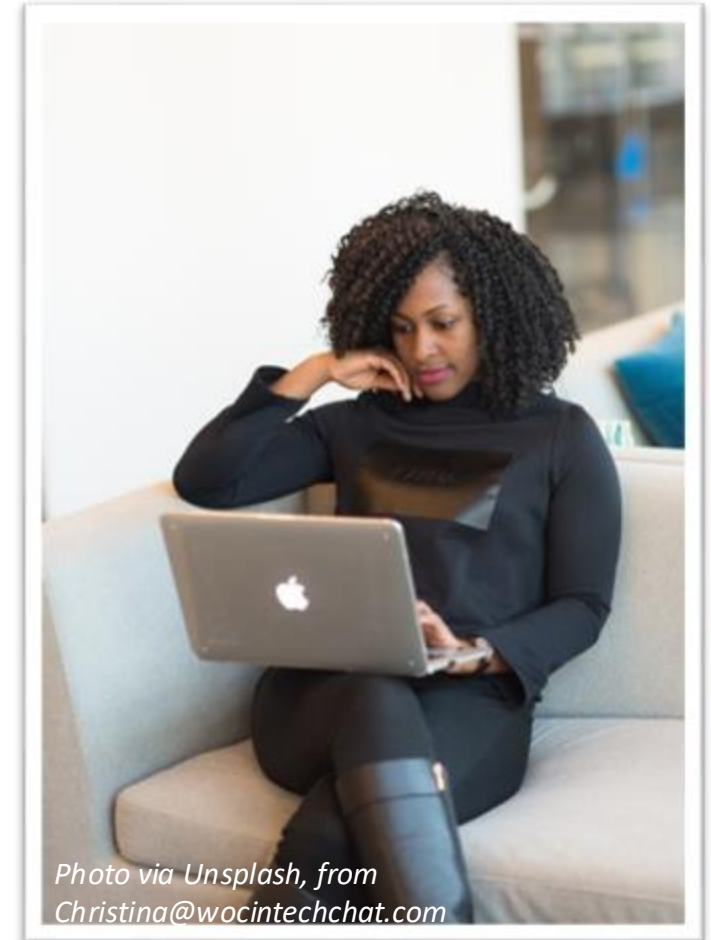
Region	
Northeast	19%
Midwest	23%
South	35%
West	23%
Gender	
Male	50%
Female	49%
Non-binary	0%
Age/Generation	
Gen Z (18–22)	6%
Millennials (23–38)	28%
Gen X (39–54)	30%
Boomers (55–73)	30%
Silent Generation (74+)	6%

Race	
Caucasian	66%
Black	15%
Hispanic or Latinx	19%
Asian	8%
American Indian or Alaska Native	2%
Native Hawaiian or Other Pacific Islander	0%
Other	1%
Prefer not to answer	0%
Income	
Under \$25,000	17%
\$25,000–\$49,999	30%
\$50,000–\$74,999	17%
\$75,000–\$99,999	15%
\$100,000–\$124,999	8%
\$125,000–\$149,999	6%
\$150,000–\$249,999	5%
\$250,000 or more	2%

Number of People in Household	
One	27%
Two	32%
Three or four	32%
Five or six	8%
More than six	1%
Children in Household	
Yes	32%
No	68%
Children's Ages (of those who said yes to having children in household)	
Age 5 and under	31%
6–12 years	53%
13–17 years	43%
Education	
Some high school or less	3%
Completed high school	20%
Trade/technical school	4%
Some college	24%
Completed college	36%
Graduate degree	14%

Why Conduct the Survey?

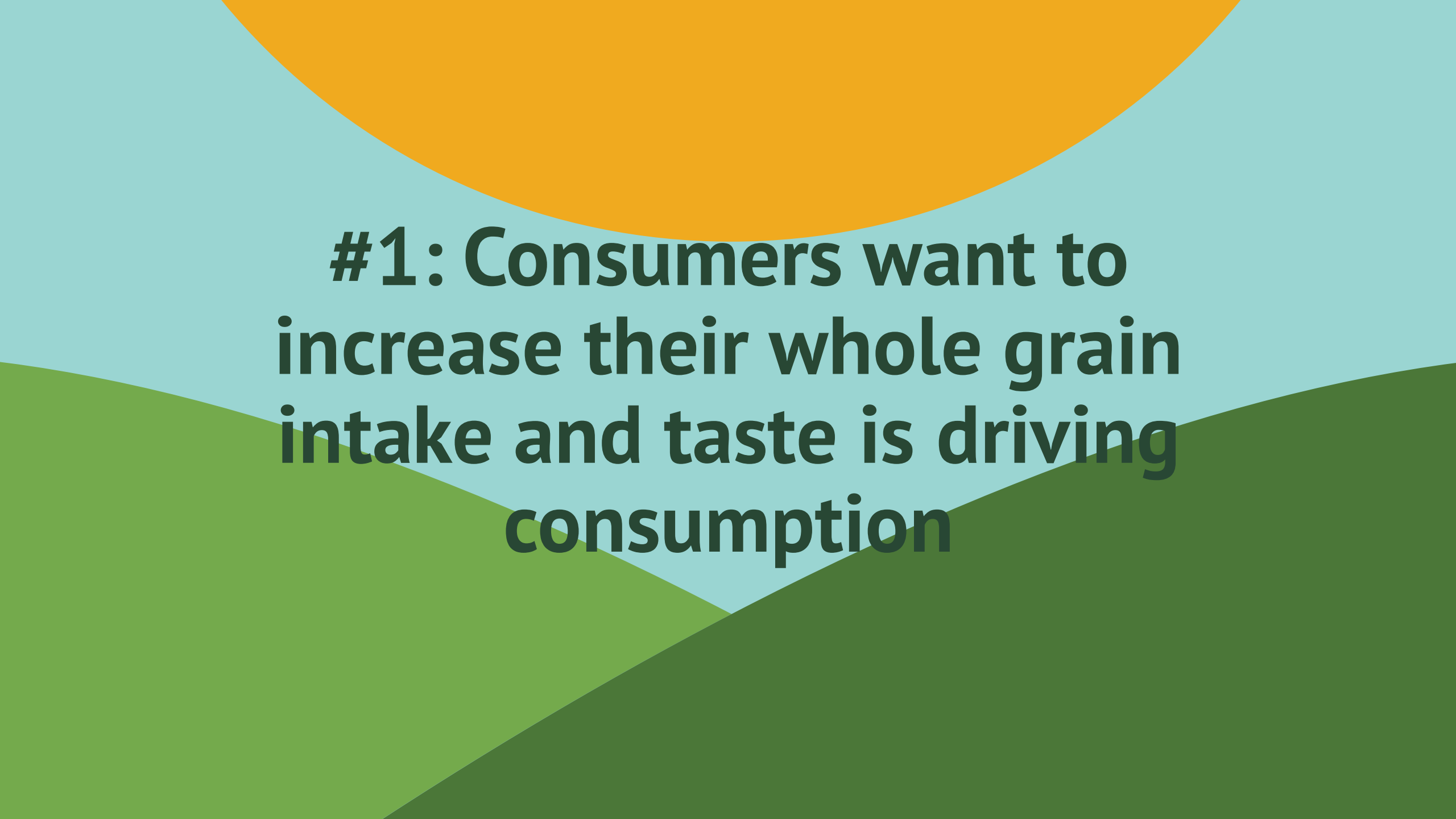
- National survey reporting on whole grain intake (NHANES) lags at least 4-5 years behind
- The latest NHANES data we have on whole grain intake is still from pre-COVID (2018)
- The food and nutrition landscape has changed rapidly over the last few years



Outline

1. Consumers want to increase their whole grain intake and taste is driving consumption
 2. The Whole Grain Stamp is a powerful and trusted tool
 3. Taste and health are key motivators, while cost and identification remain barriers
 4. Low-carb and gluten-free dieters are not always avoiding whole grains
 5. Sustainable production methods and alternative grain attributes are trending
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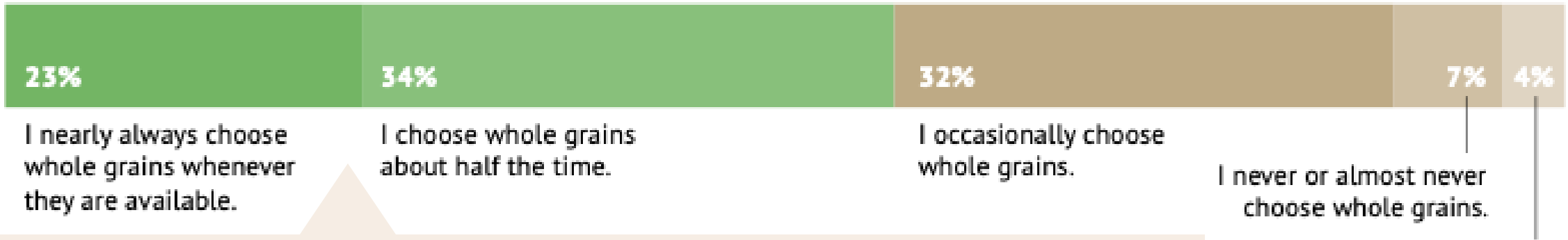
- ★ Other food and cooking trends
- ★ Profile of a whole grain shopper
- ★ Spotlight on local grains



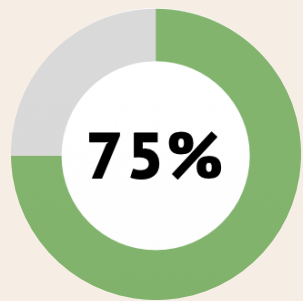
#1: Consumers want to increase their whole grain intake and taste is driving consumption

A majority of all consumers – 57% – say they choose whole grain options at least half the time.

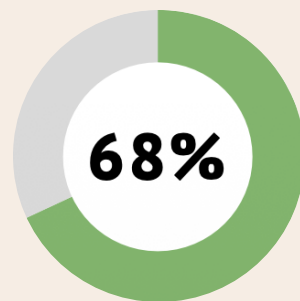
Overall consumer habits when choosing whole grains



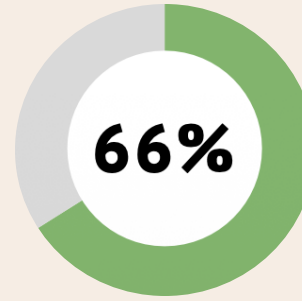
In many demographic groups, an **even larger majority** of consumers choose whole grains at least half the time.



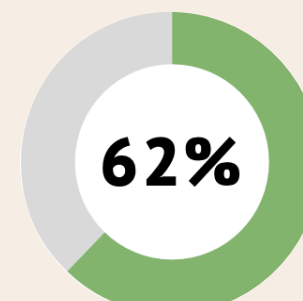
of plant-based eaters



of health-conscious consumers



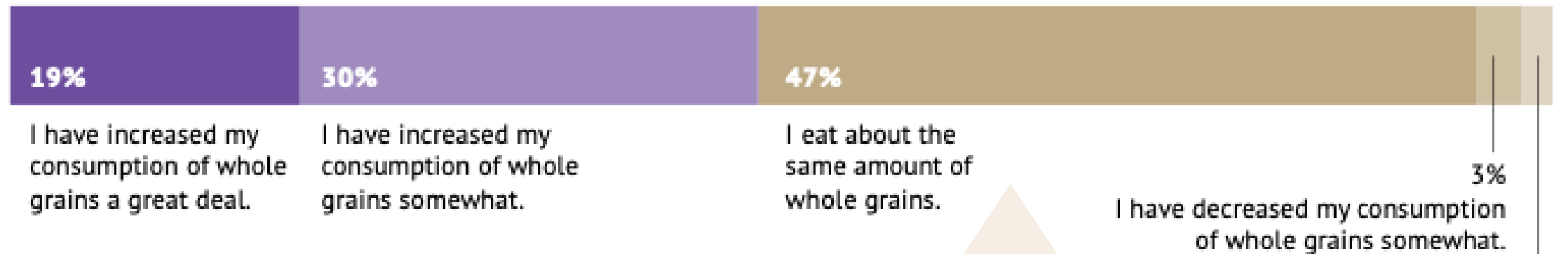
of parents



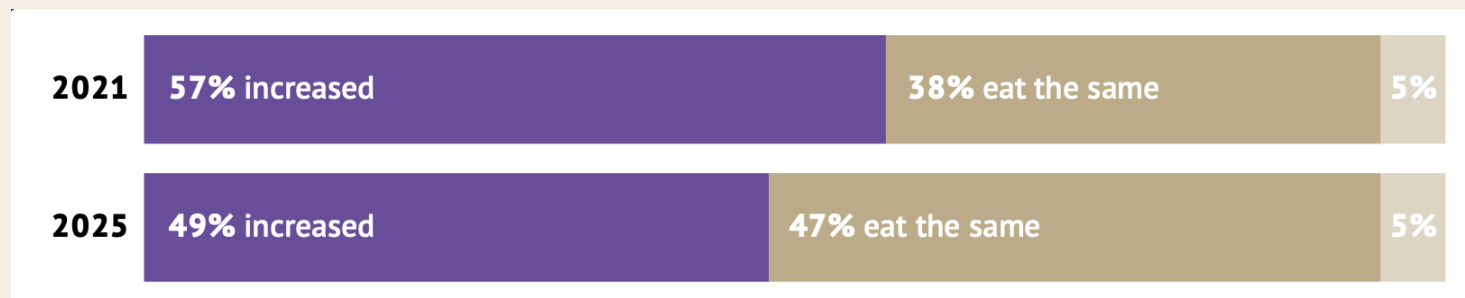
of Millennial consumers

Additionally, nearly half of consumers—49%—have increased their whole grain consumption in the past five years.

Changes in whole grain consumption over the past five years



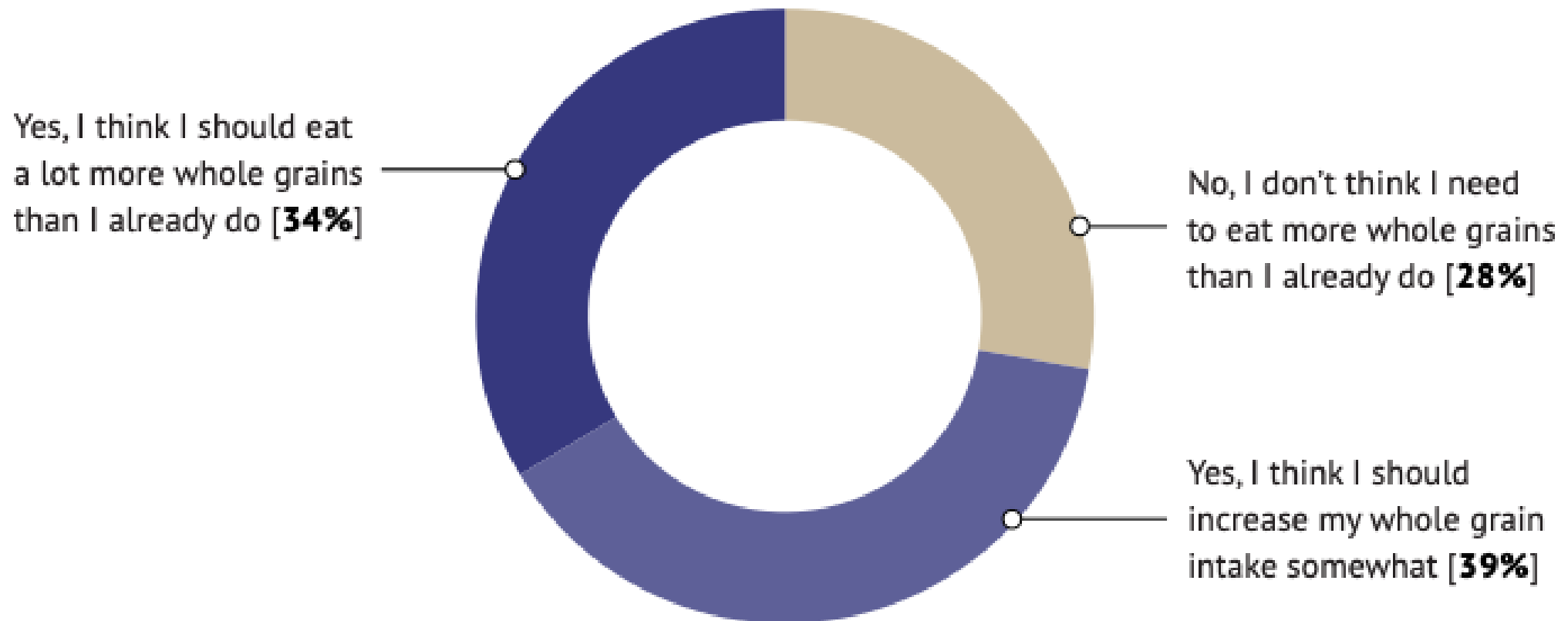
Compared with 2021, many more people have **remained consistent** in their eating habits, which may be a sign that consumers who increased their consumption in the past have **continued to include whole grains** in their diet.



Nearly three-quarters of consumers—73%—think they should eat more whole grains.

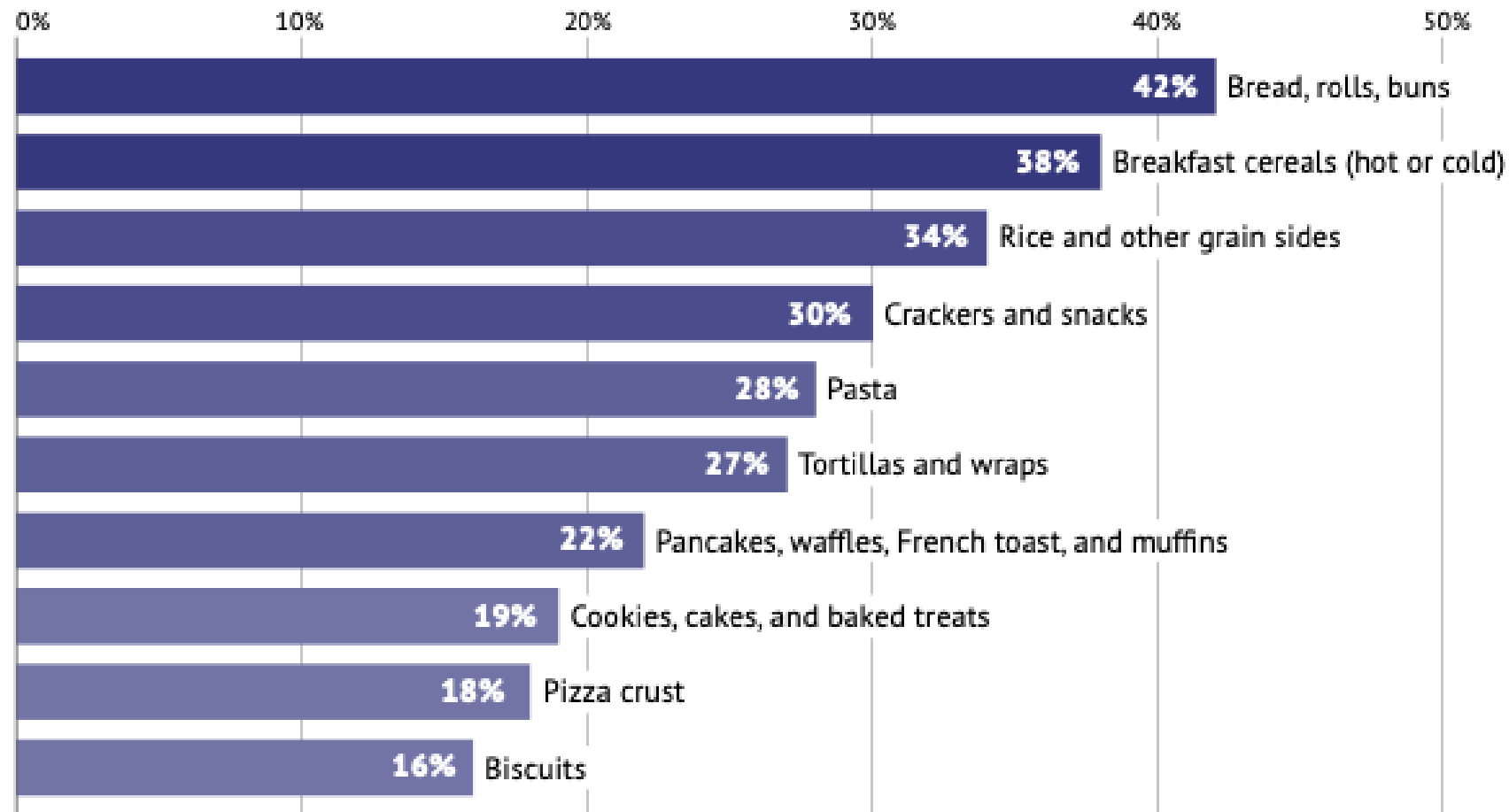
This figure is even higher for parents [80%] and younger generations (Gen Z and Millennials) [79%].

Percentage of consumers who believe they should increase their whole grain intake



Breads, breakfast cereals, and grain sides are the foods most commonly consumed as whole grains.

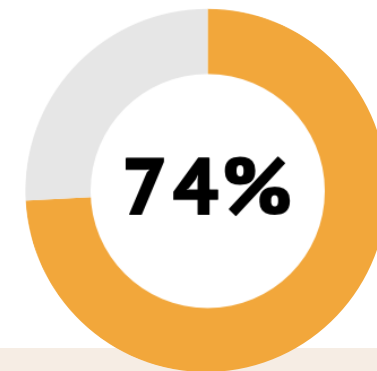
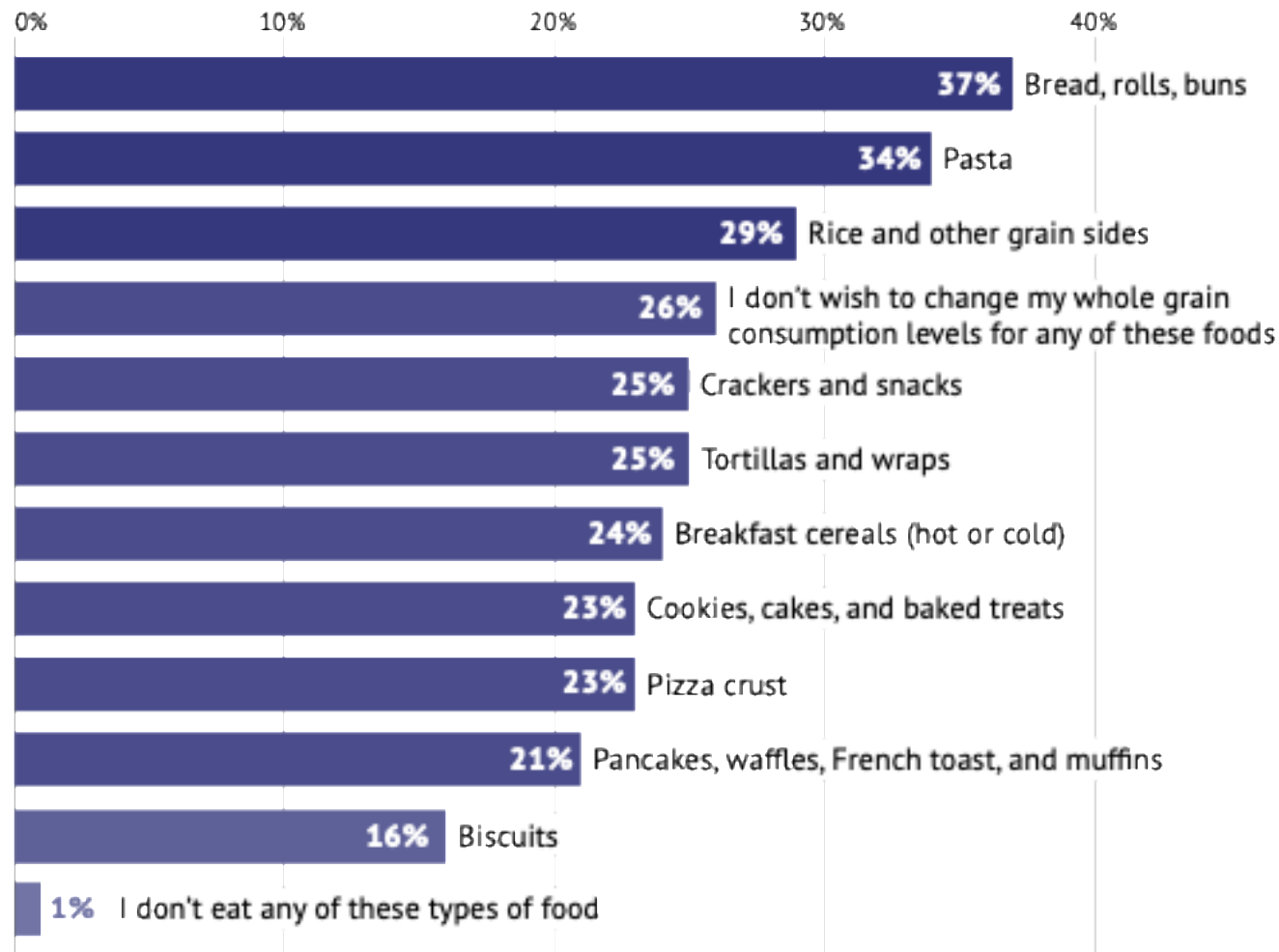
Frequency with which consumers choose whole grain versions of foods.



These numbers represent the average percentage consumed as whole grains across all those who said they eat each food.

Most consumers wish they ate more whole grains, particularly **bread**s and **pasta**.

Percentage of consumers who want to increase their whole grain consumption in each category

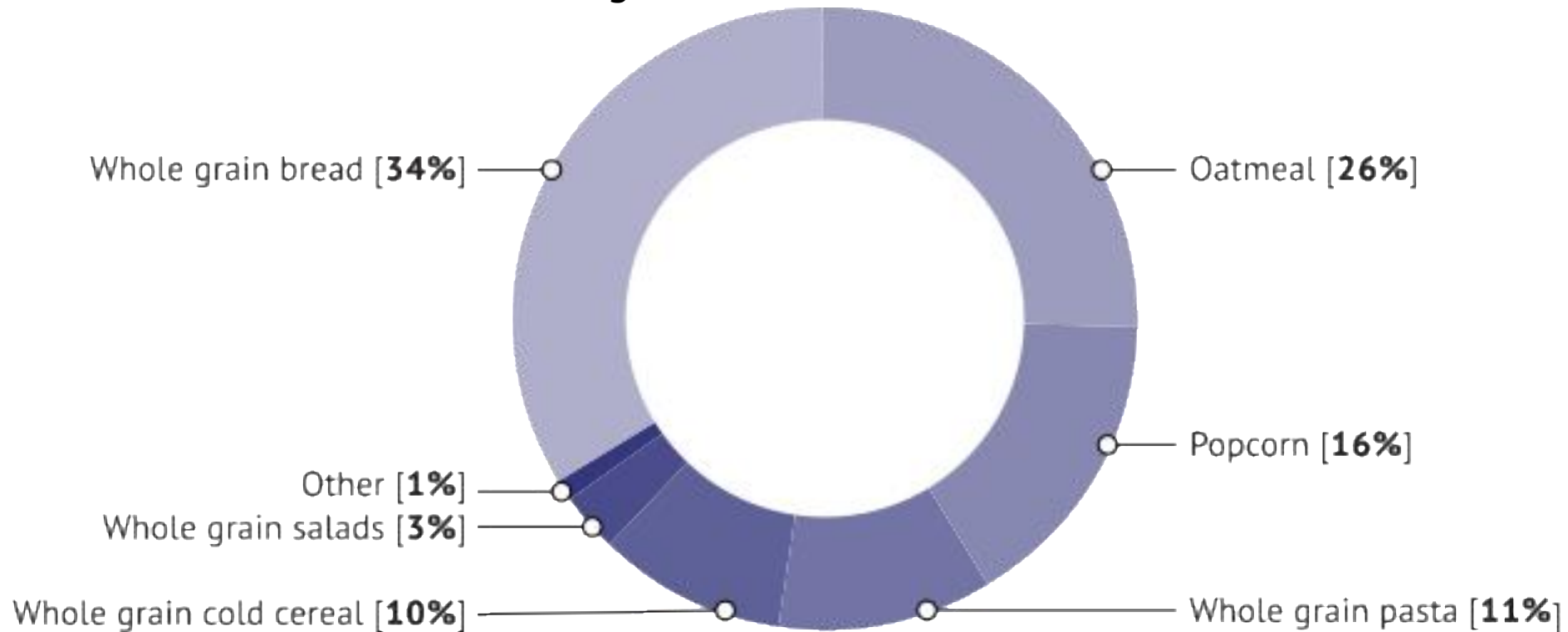


of consumers **want to increase** the whole grains they eat in at least one of these categories.

Of those who eat whole grain foods, **one in three says whole grain bread is their favorite, with oatmeal as the runner-up.**

While whole grain pasta is often described as a food that's difficult to produce in whole grain form, one in ten consumers considers it their favorite whole grain food.

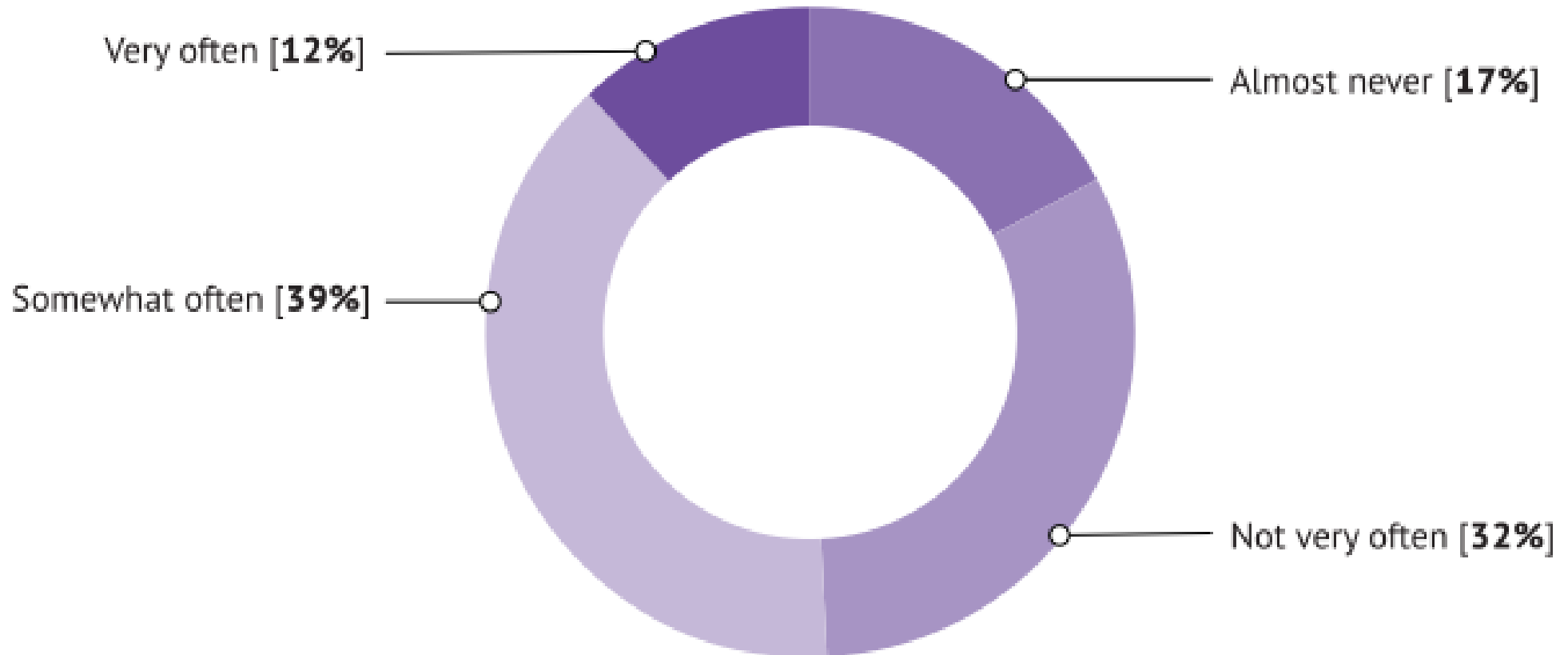
Consumers' one favorite whole grain food



Consumers are choosing whole grains **more frequently when eating out.**

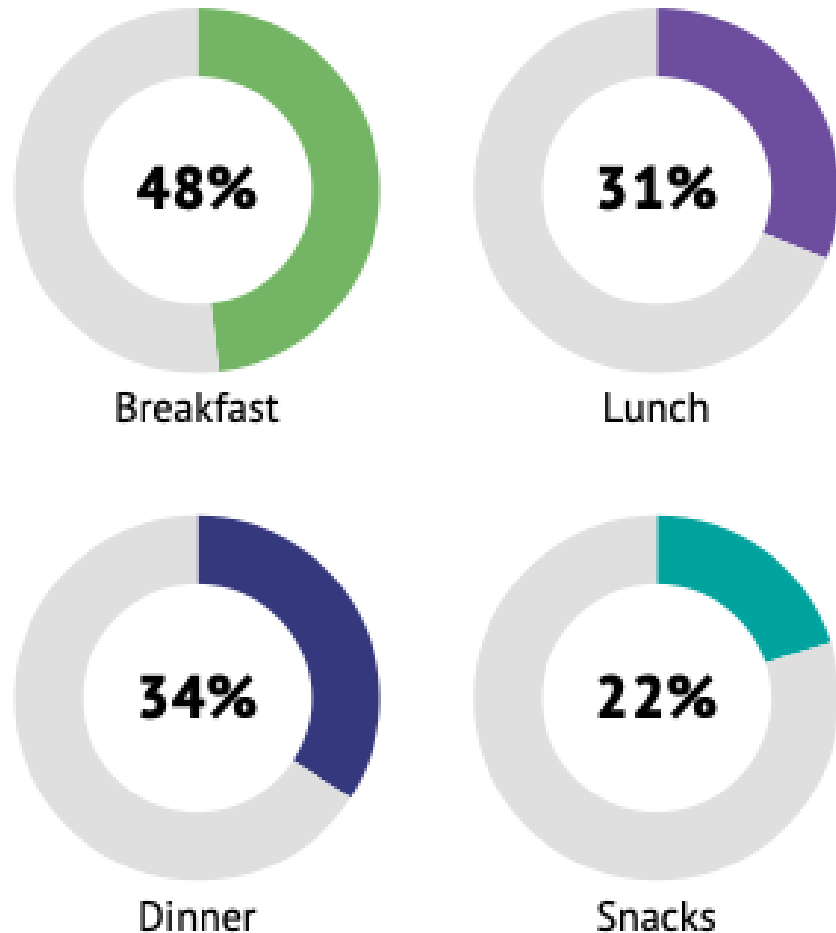
In 2023, 46% of consumers said they chose whole grains at least somewhat often, and now 51% say that.

Frequency with which consumers choose whole grains at restaurants or when ordering take-out/delivery

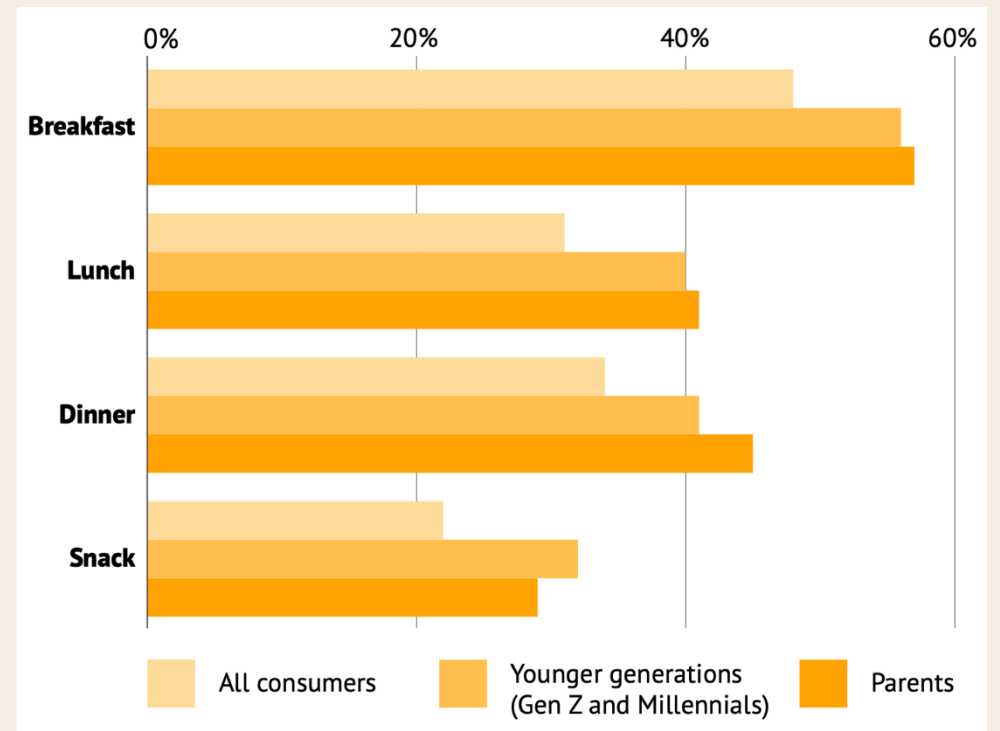


Half of consumers eat whole grains for breakfast most or all of the time.

Meal during which consumers eat whole grains “most of the time” or “all of the time”

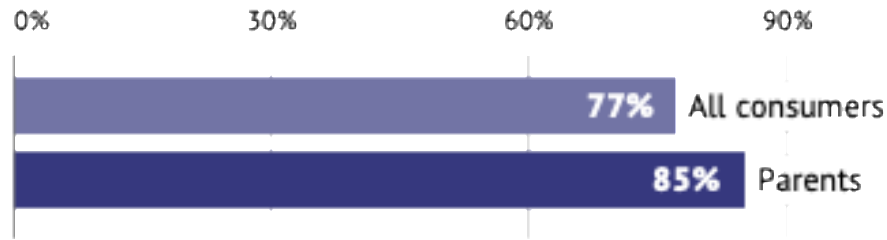


Parents and younger generations (Gen Z & Millennials) are much more likely to eat whole grains at all meals.

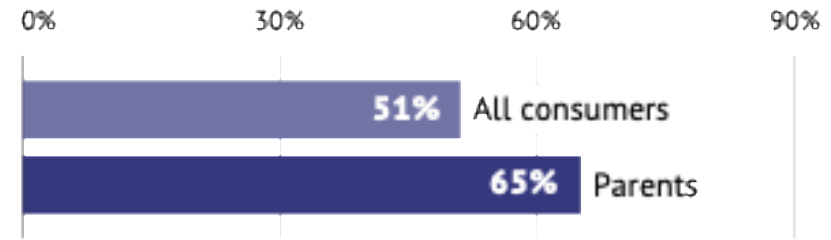


Parents in particular report that they value, seek out, and regularly eat whole grains. They are more likely to:

Want whole grain content shown on packaging (Q23)



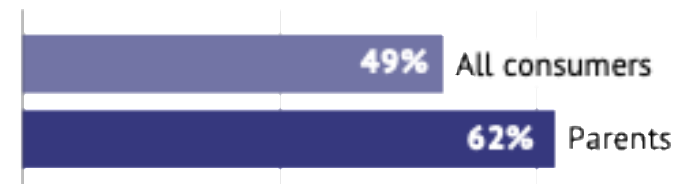
Choose whole grains when eating out (Q10a)



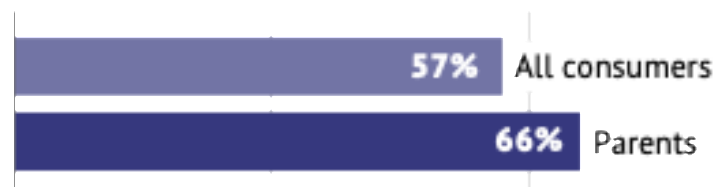
Think they should eat even more whole grains (Q8a)



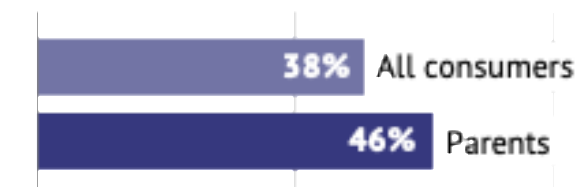
Have increased their whole grain consumption (Q7)



Choose whole grains over half the time (Q6)



Prefer whole grain foods because they are less processed than refined grains (Q11a)



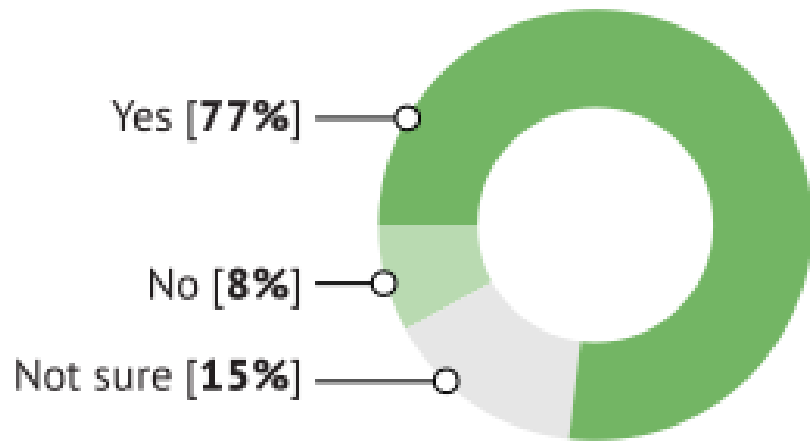
The background features a stylized landscape. At the top, a large orange semi-circle represents the sun. Below it, a light blue sky transitions into two rolling hills. The hills are colored in shades of green, with a lighter green on the left and a darker green on the right. The text is centered in the sky area.

**#2: Consumers use and
trust the Whole Grain
Stamp**

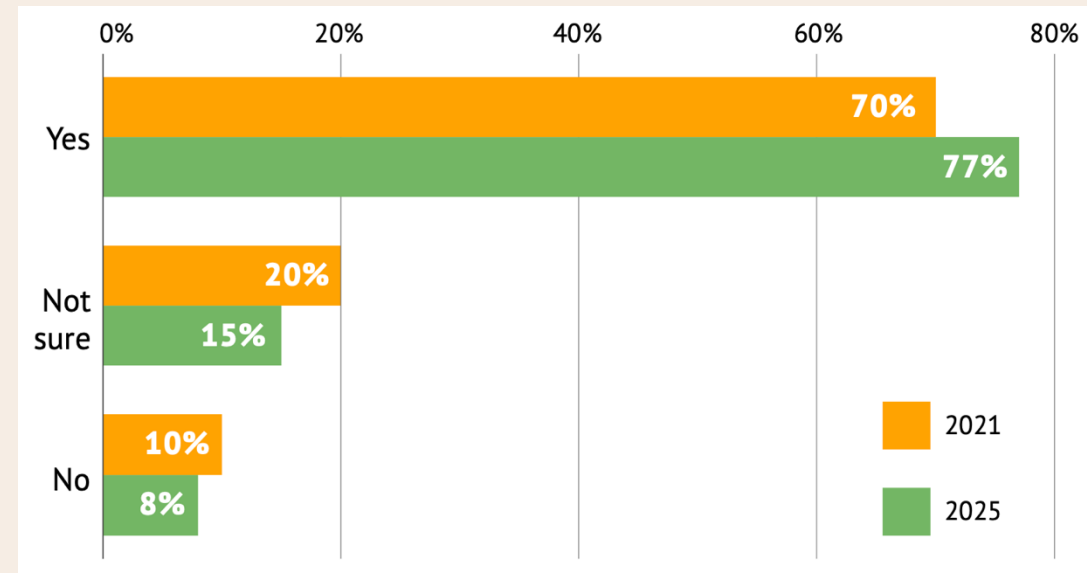
A significant majority of consumers want the whole grain content of products to be included on the packaging.

This is something the Whole Grain Stamp offers consumers.

Consumer interest in seeing whole grain content displayed on packaging



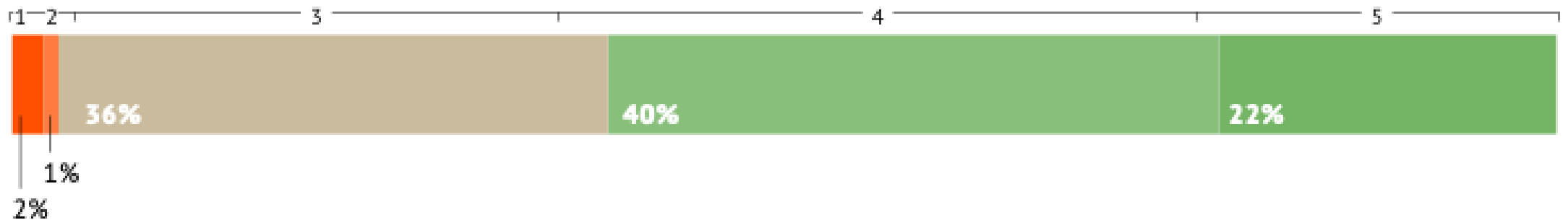
Compared to 2021, even more consumers want whole grain content included, and fewer don't want it included or aren't sure.



About **two thirds** of consumers say packaging symbols like the Whole Grain Stamp give them **more confidence** in the product they are buying.

Among parents, this number is higher, with **68%** saying that symbols like the Stamp give them more confidence in a product.

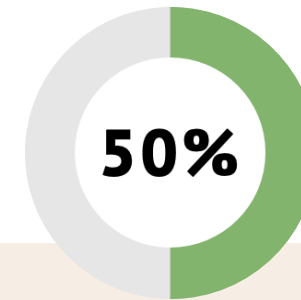
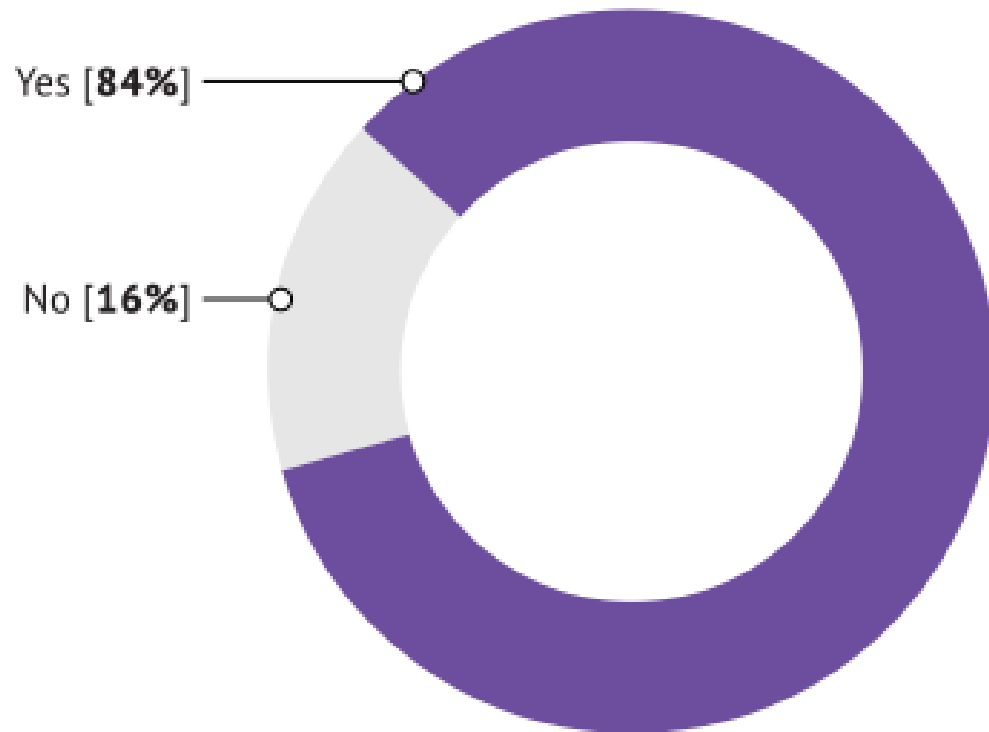
Consumer confidence in products with independent, third-party food packaging symbols
Ranked on a scale of 1 (Much less confidence) to 5 (Much more confidence)



84% of consumers say they trust the Whole Grain Stamp.

The Whole Grain Stamp is an easy, *trusted* way for companies to provide the whole grain content information we know consumers are looking for.

Percentage of consumers who trust the Whole Grain Stamp to accurately state whole grain content

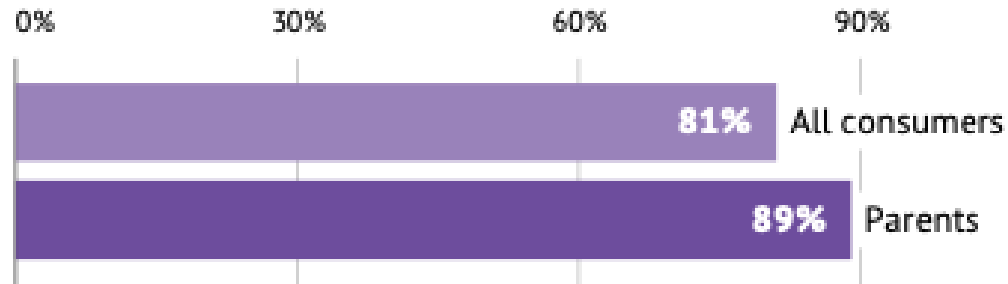


of consumers think using the **Whole Grain Stamp** is one of the best ways to **encourage more** whole grain consumption.

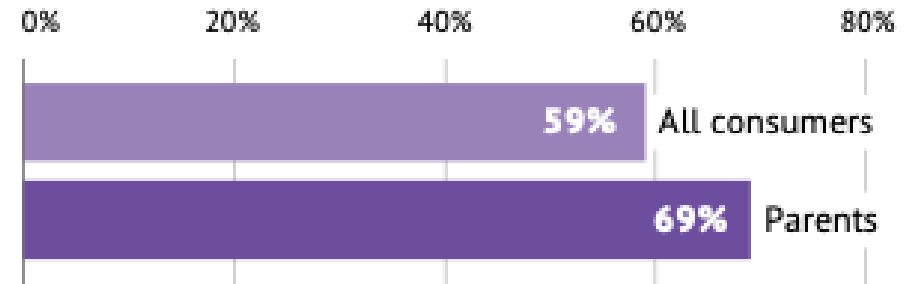
88% of parents trust the Whole Grain Stamp. They trust, want, and use it more than nearly all other consumers.

Parents prioritize whole grains, and it's clear the Stamp is a tool they use to identify them.

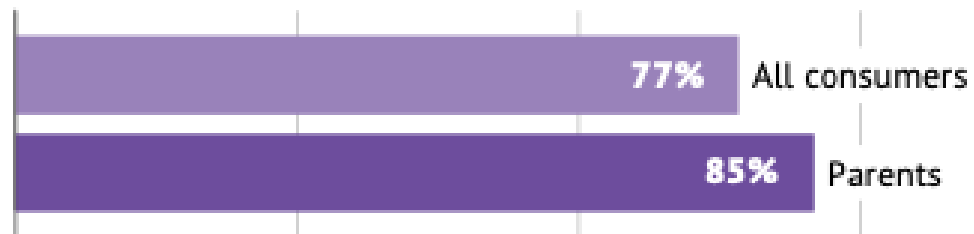
They are more likely to buy a product with the Stamp (Q26)



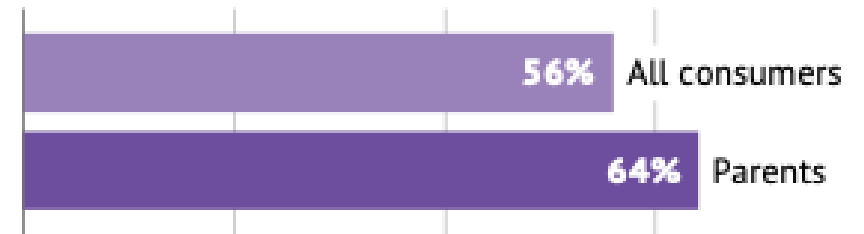
They look for the Stamp while shopping (Q24a)



They want whole grain content on packaging (Q23)



They are skeptical of whole grain labeling without the Stamp (Q27)



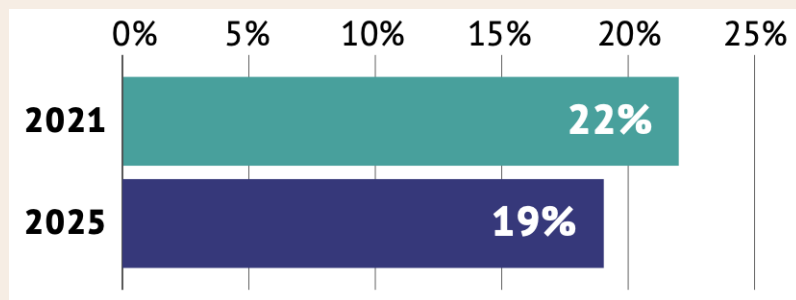
Four out of five consumers would use the Whole Grain Stamp as part of their purchasing decisions.

Just over half of those consumers would also look at other factors like sugar and sodium content.

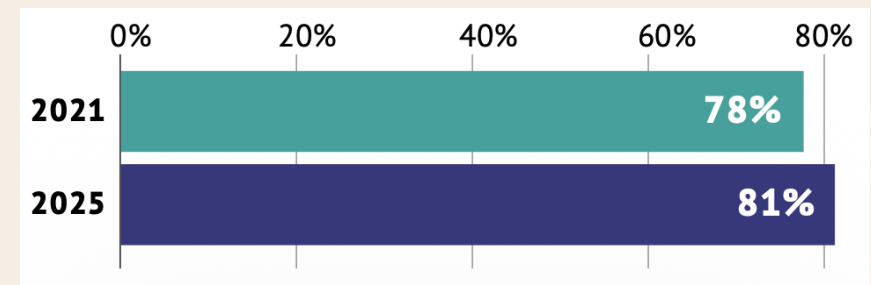
Consumer likeliness to purchase a product with the Whole Grain Stamp



Significantly **fewer** people say the Stamp **would not impact** their purchasing decisions.



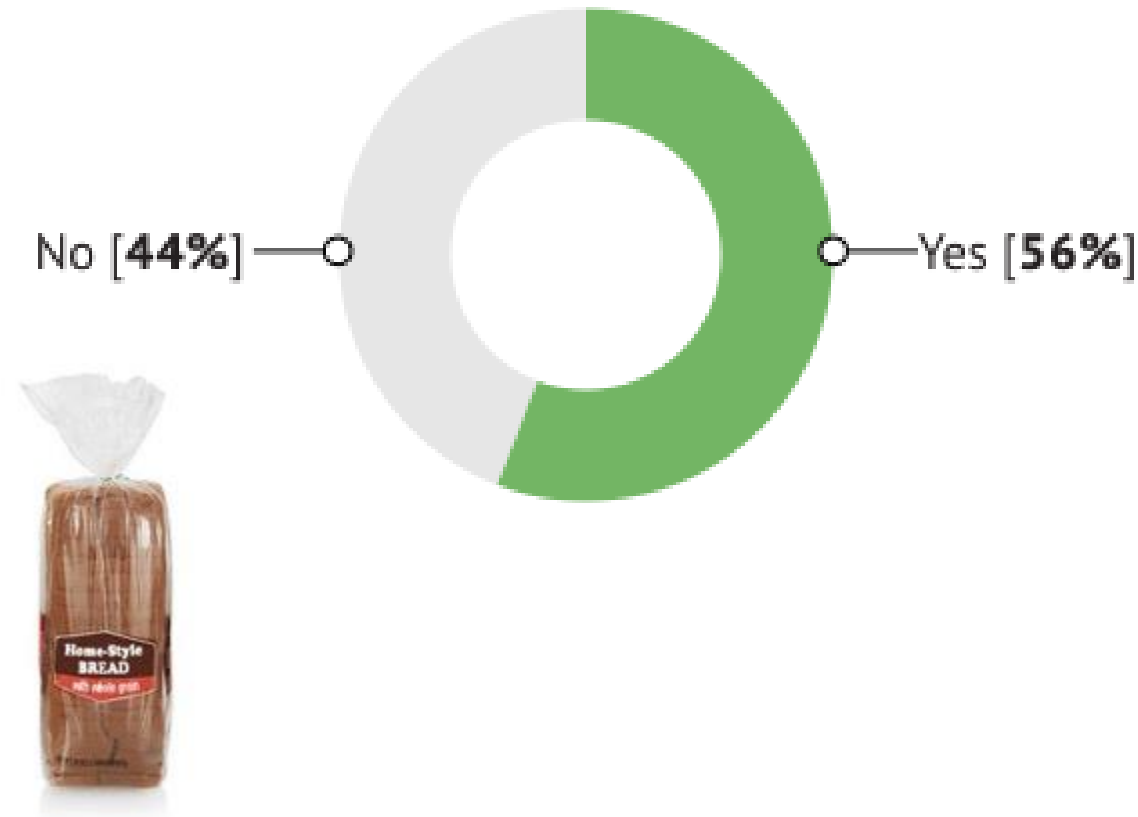
Compared to 2021, significantly **more** people say the Stamp would make them **more likely** to buy a product (with just over half also considering other factors).



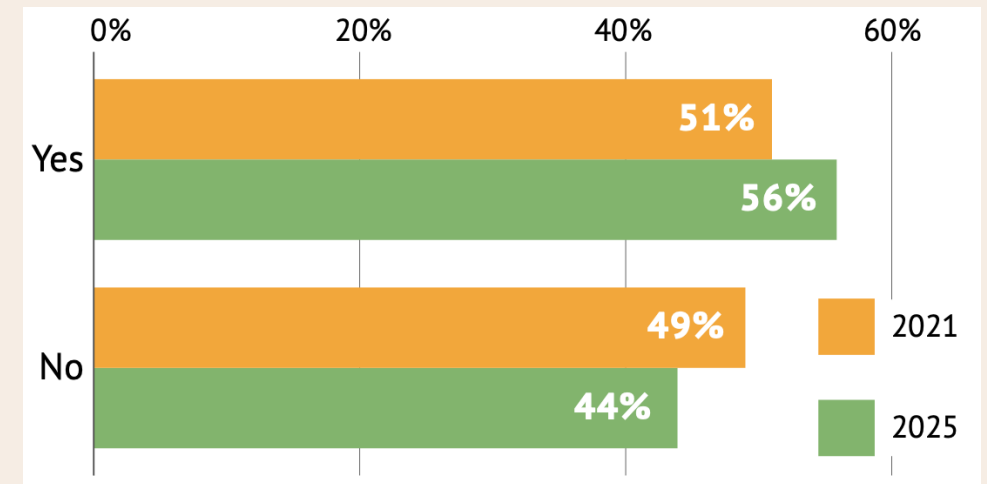
If a product does not use the Whole Grain Stamp, more than half of consumers would be skeptical of any whole grain claims made on its labeling.

Gen Z shoppers would be even more skeptical [65%].

Percentage of consumers who would question whole grain claims on products without the Stamp

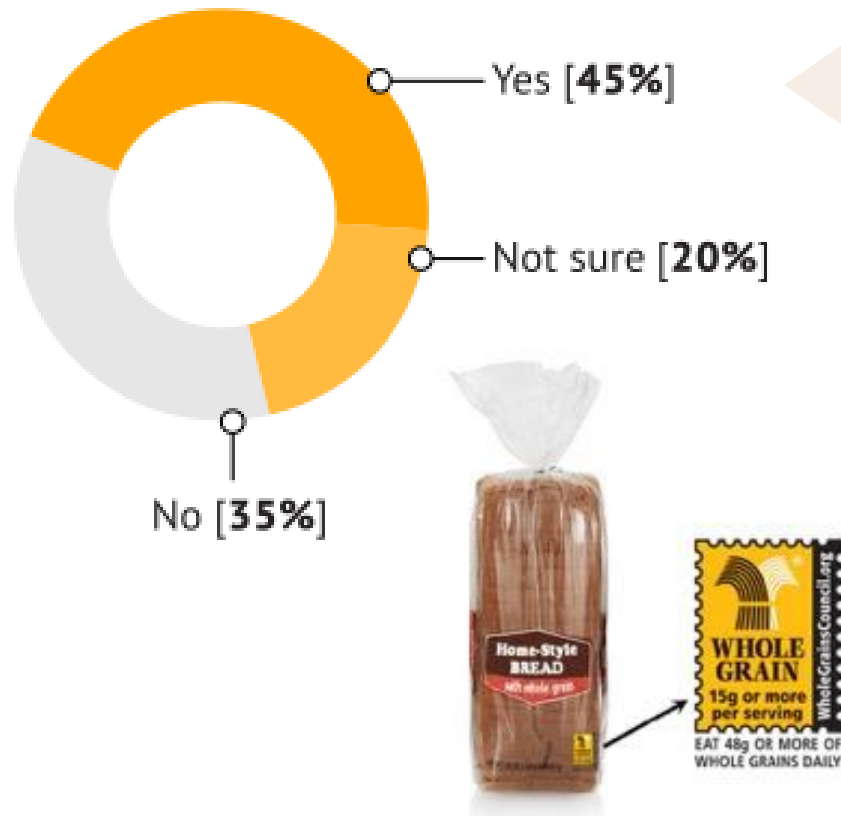


Compared to 2021, even more consumers would question a product's whole grain claims without the Stamp.

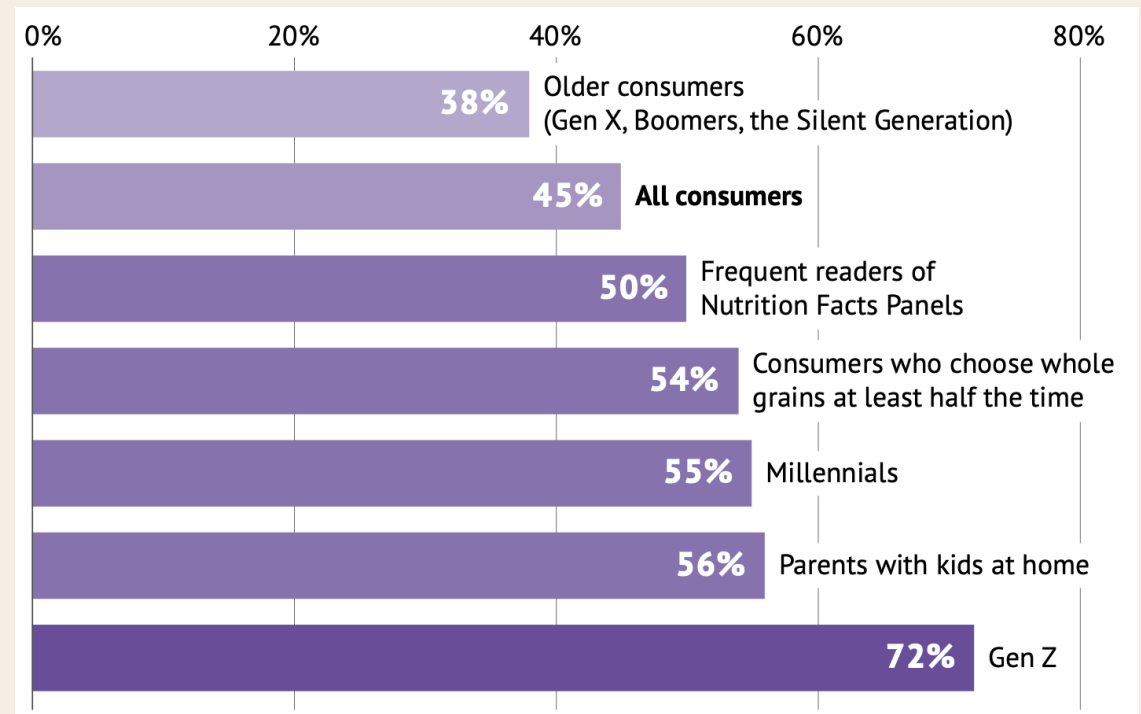


Close to half of all consumers recognize the Whole Grain Stamp, and nearly three quarters of Gen Z consumers recognize it.

Percentage of consumers who have seen the Whole Grain Stamp on packaging

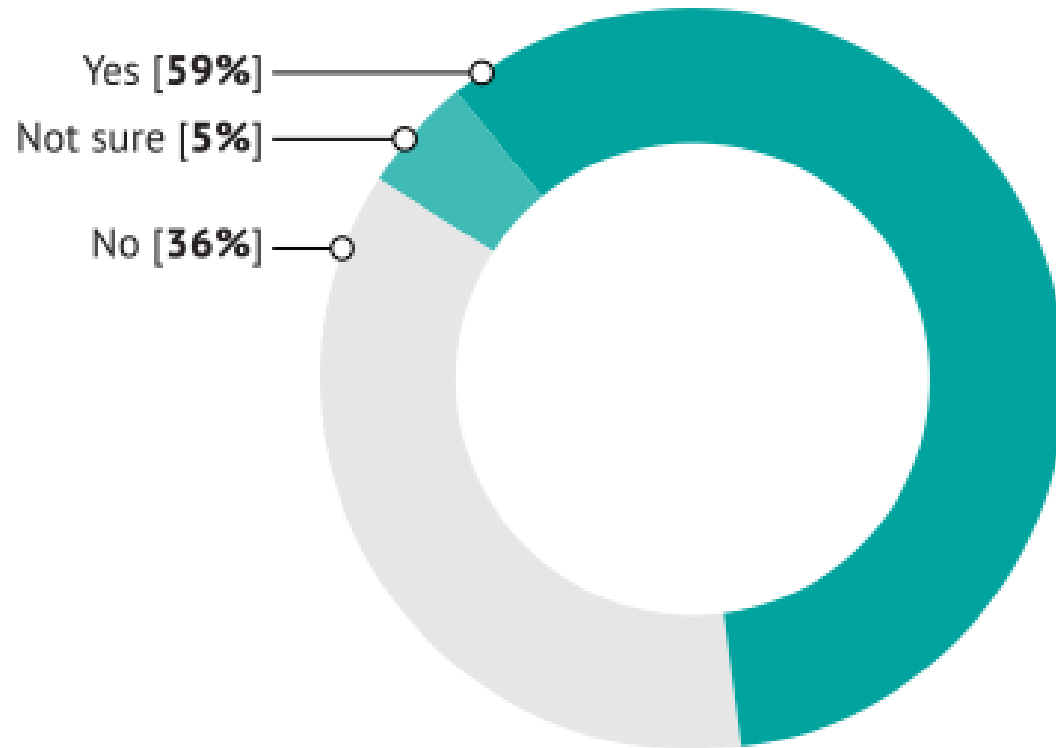


While older consumers don't recognize the Stamp as often, other demographic groups are much more likely to have seen it:

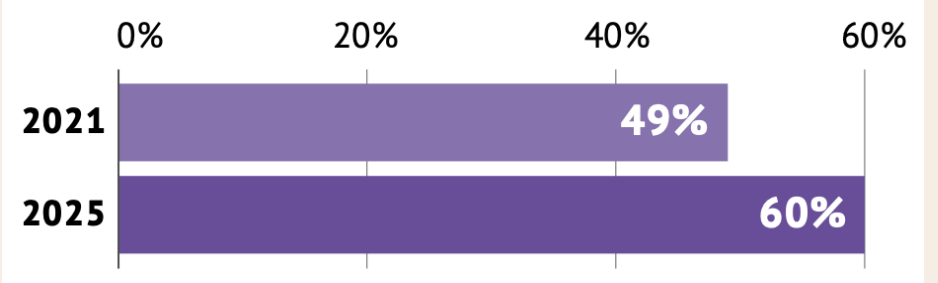


Over half of the consumers who recognize the Whole Grain Stamp look for it when shopping.

Percentage of consumers who have seen the Whole Grain Stamp *and* look for it when choosing products

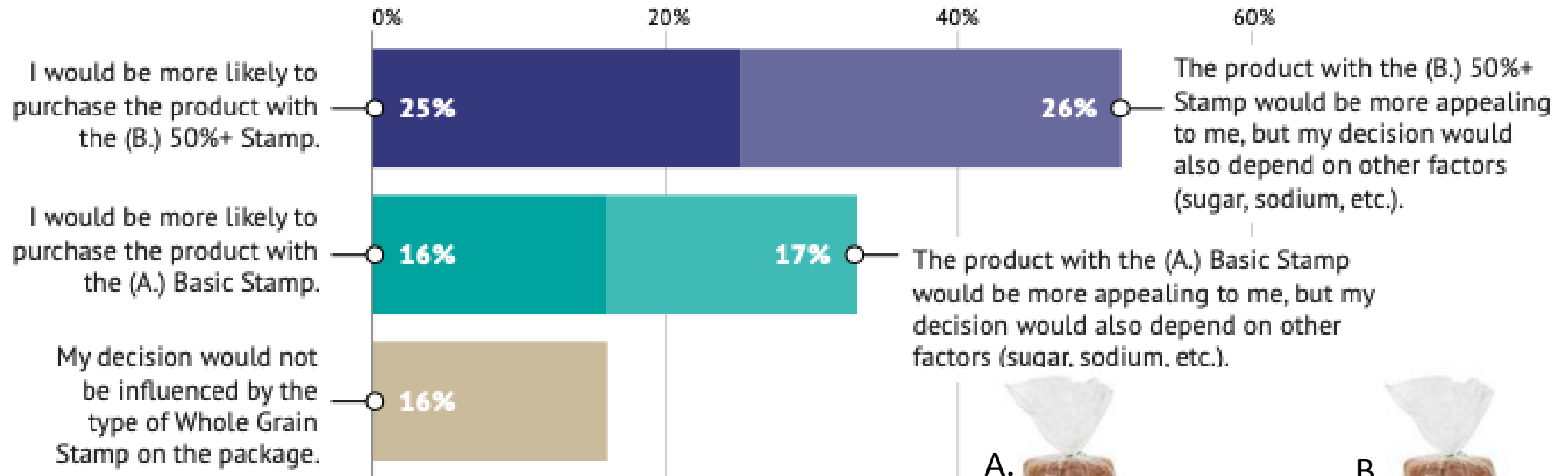


The vast majority of Gen Z consumers recognize the Stamp. Even though a similar majority recognized it in 2023, they were much less likely to look for it. This has changed in 2025!



51% of consumers would be more likely to purchase a product bearing the 50%+ Stamp than a product bearing the Basic Stamp.

Consumer likeliness to purchase a product with the 50%+ Stamp versus the Basic Stamp



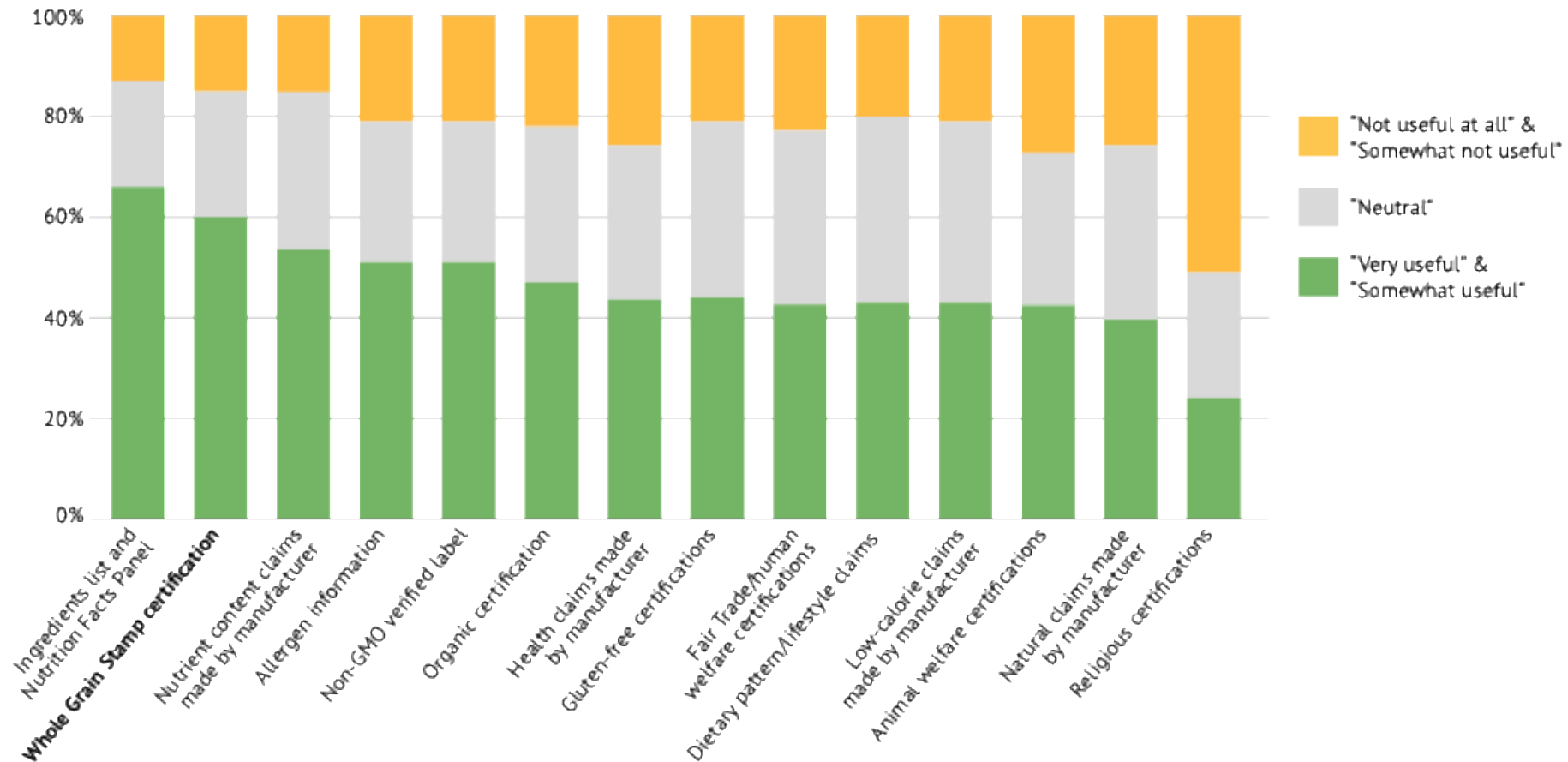
The product with the (B.) 50%+ Stamp would be more appealing to me, but my decision would also depend on other factors (sugar, sodium, etc.).

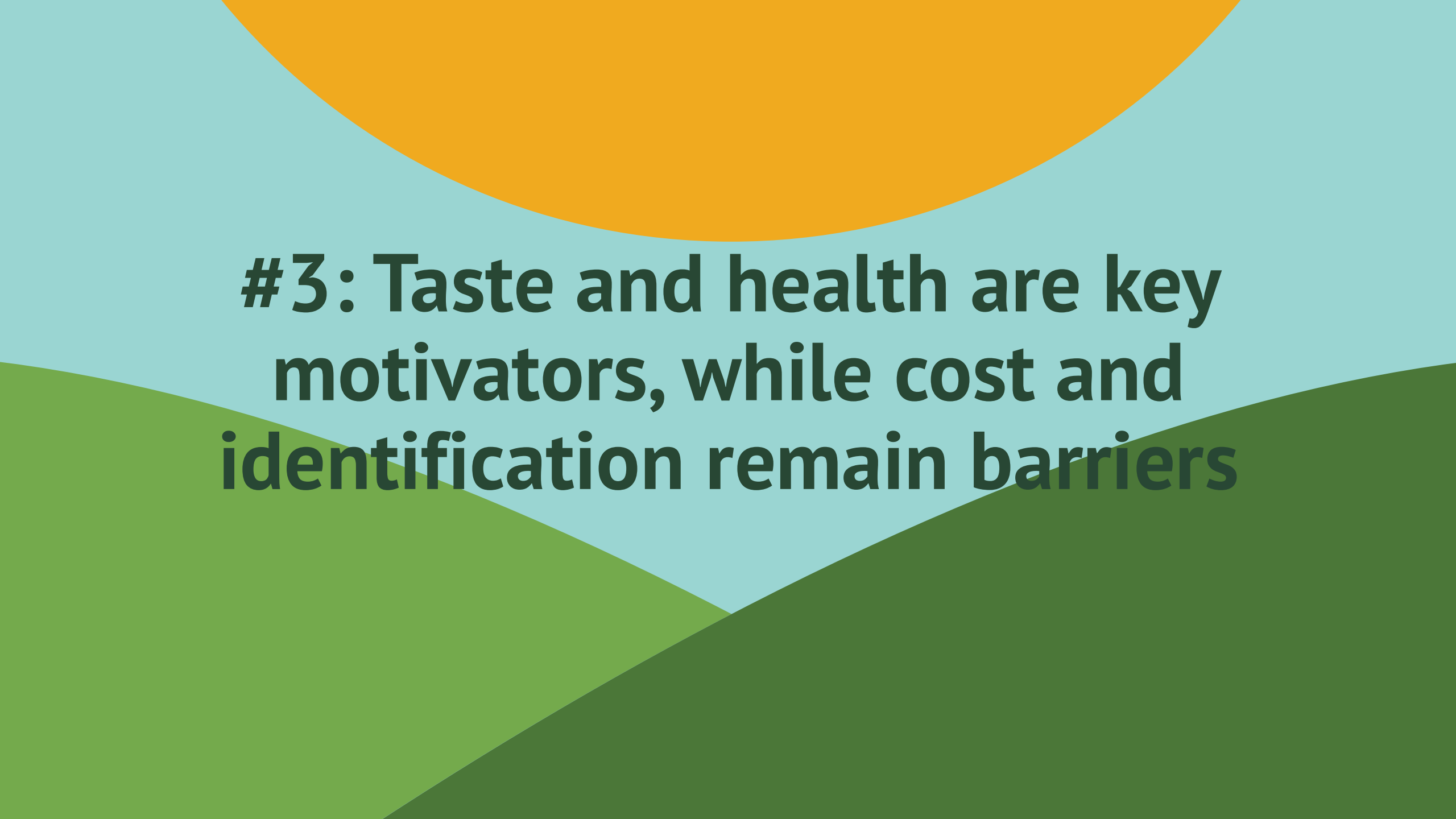
The product with the (A.) Basic Stamp would be more appealing to me, but my decision would also depend on other factors (sugar, sodium, etc.).



The Whole Grain Stamp is the second most highly ranked packaging label in terms of usefulness, (second only to the Nutrition Facts Panel).

Usefulness of a product's packaging information in consumer decision-making
Ranked on a scale of 1 (Very useful) to 5 (Not useful at all)





#3: Taste and health are key motivators, while cost and identification remain barriers

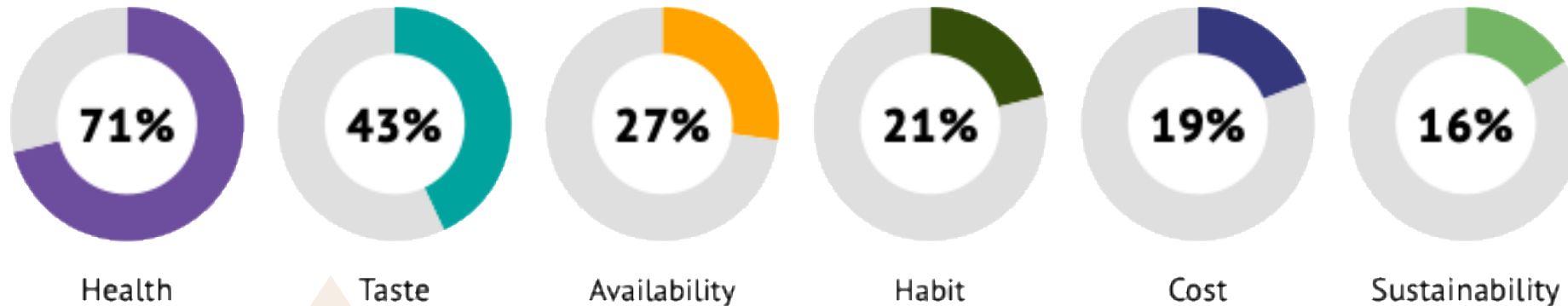
Top influences on purchasing decisions include flavor, price, familiarity, health, and a desire to try new foods.

Consumer purchasing decisions

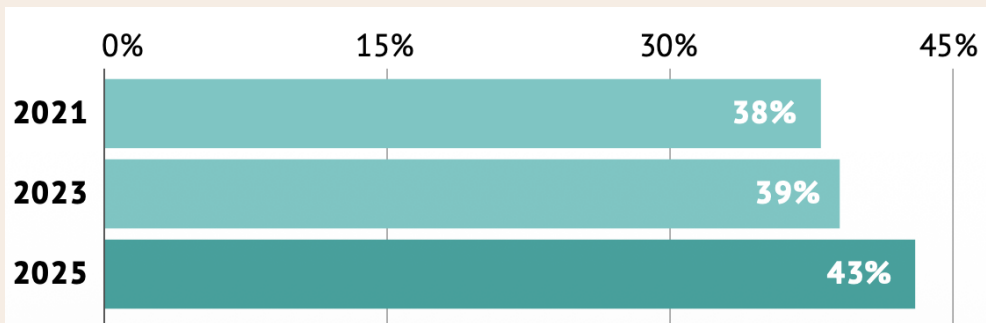


Health is still the leading reason for choosing whole grains.

Reasons consumers choose whole grains



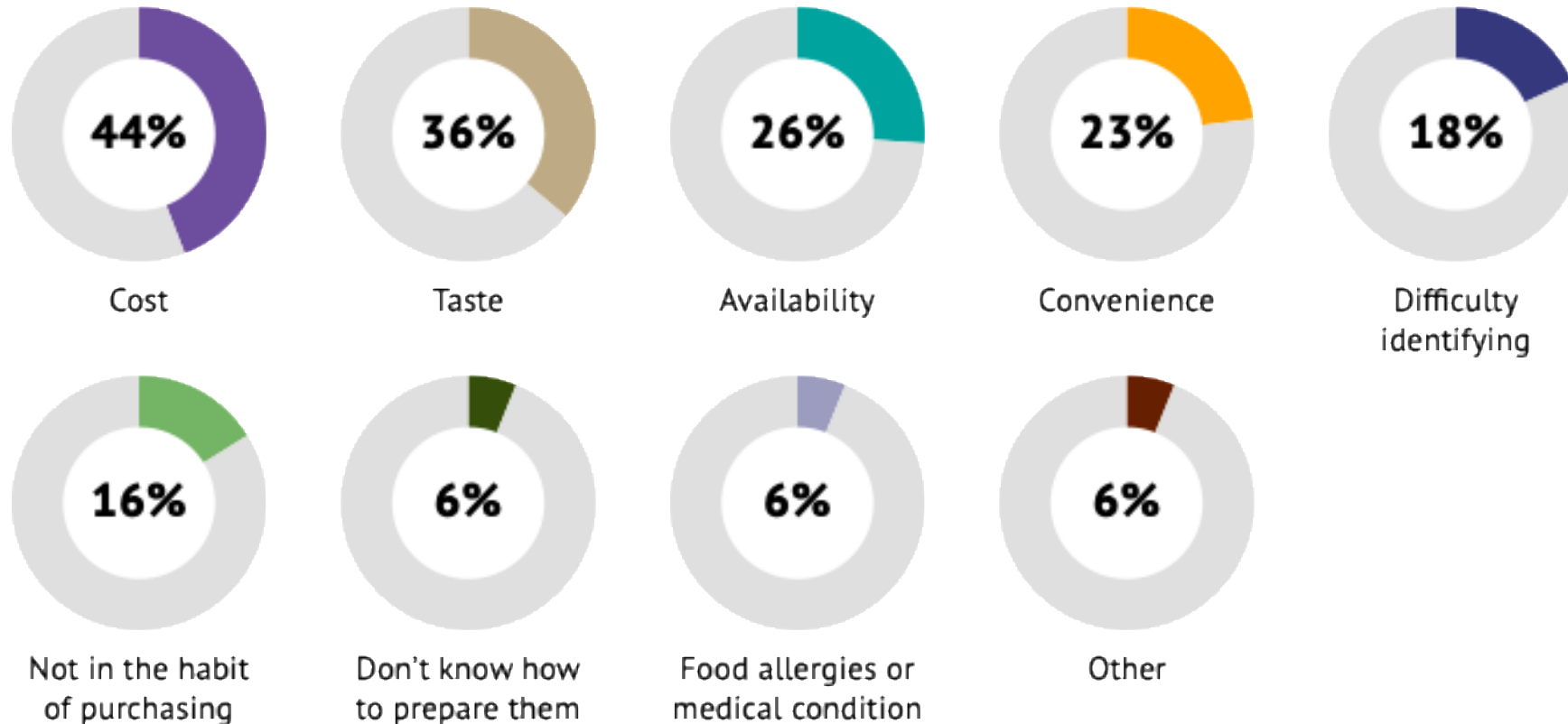
Significantly more people report this year that they choose whole grains because they **like the taste!**



A number of factors prevent consumers from eating more whole grains, including **cost** and **taste**.

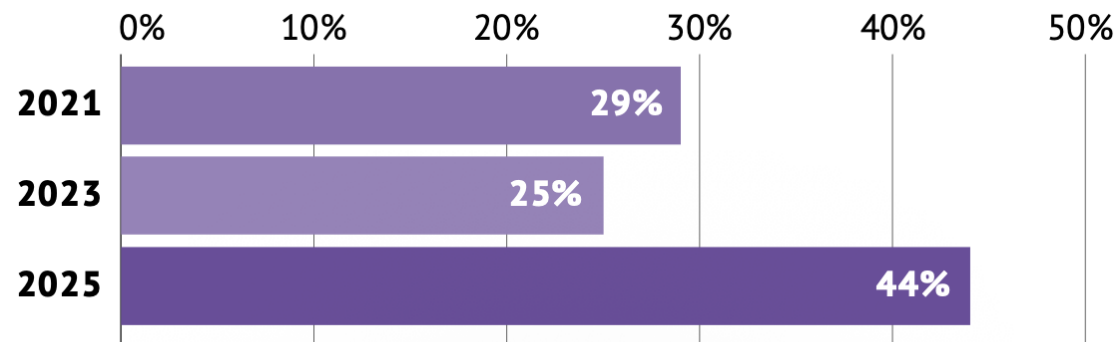
Additionally, one in four consumers says whole grain options don't seem as convenient as other options. One in five reports having trouble identifying which foods are whole grain.

Barriers to increasing whole grain intake



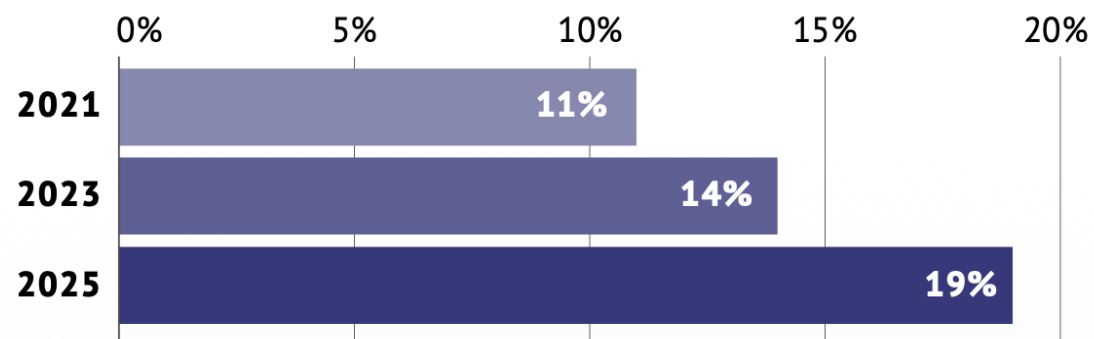
Many more people are citing **cost** as a **barrier** to whole grain consumption this year.

Cost as a barrier to choosing whole grains, 2021-2025

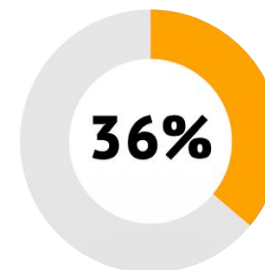


Despite this, an increasing number of consumers say they choose whole grains because they are **affordable**.

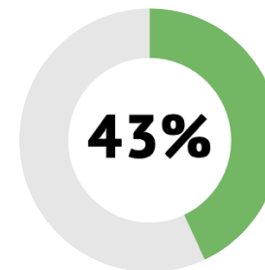
Affordability as a reason to choose whole grains, 2021-2025



Although **taste** is ranked as a significant **barrier** to eating more whole grains, far more consumers consider the taste to be a **benefit**.



of consumers say the taste of whole grains is a **barrier**.

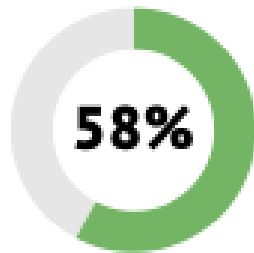


of consumers say the taste of whole grains is a **benefit**.

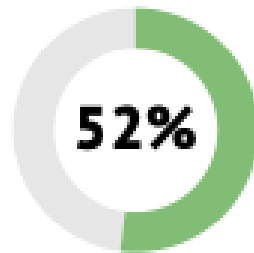
Of those who say they nearly always choose whole grains, **45%** see taste as a benefit and only **21%** see it as a barrier, suggesting that the more exposure you have to whole grains, the more you come to appreciate the nuttier, more robust flavors.

Reducing cost, increasing availability, and providing education are the best ways to encourage more people to eat whole grains.

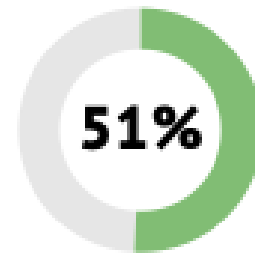
Consumer beliefs about strategies to encourage more whole grain consumption



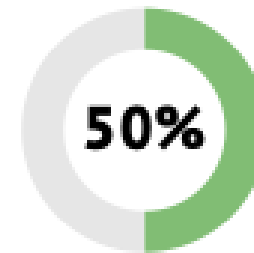
Reduce the cost of whole grain options



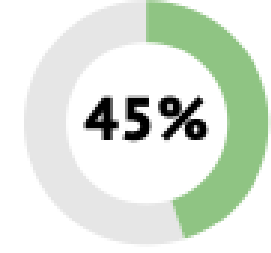
Increase variety and availability of whole grain products at supermarkets



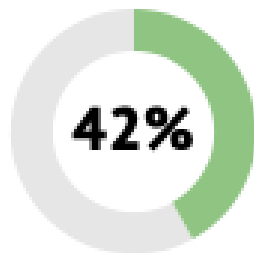
Provide more education about the benefits of whole grains



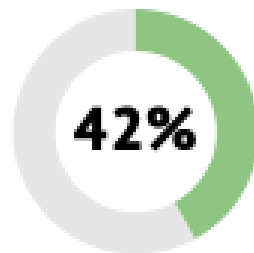
Clearly label whole grain foods (e.g. with the Whole Grain Stamp)



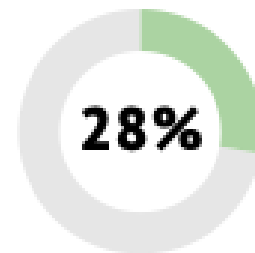
Increase the quantity of whole grains served to children in schools



Encourage parents to offer children whole grains from a very young age



Encourage more restaurants to serve whole grains



Encourage hospitals to offer more whole grain options to their patients

Consumers believe school meals should be made healthier, and that children will eat whole grains if they are prepared in a tasty, appealing way.

Level of consumer agreement with statements about whole grain consumption

School meals should be made healthier.



I believe children will eat whole grains if they are prepared in a tasty, appealing way.



Nutrition in school meals has a long-term impact on children's health.



I believe that if children are exposed to whole grain foods from a young age, they are more likely to continue those habits into adulthood.



Whole grains are important for children's nutrition and development.



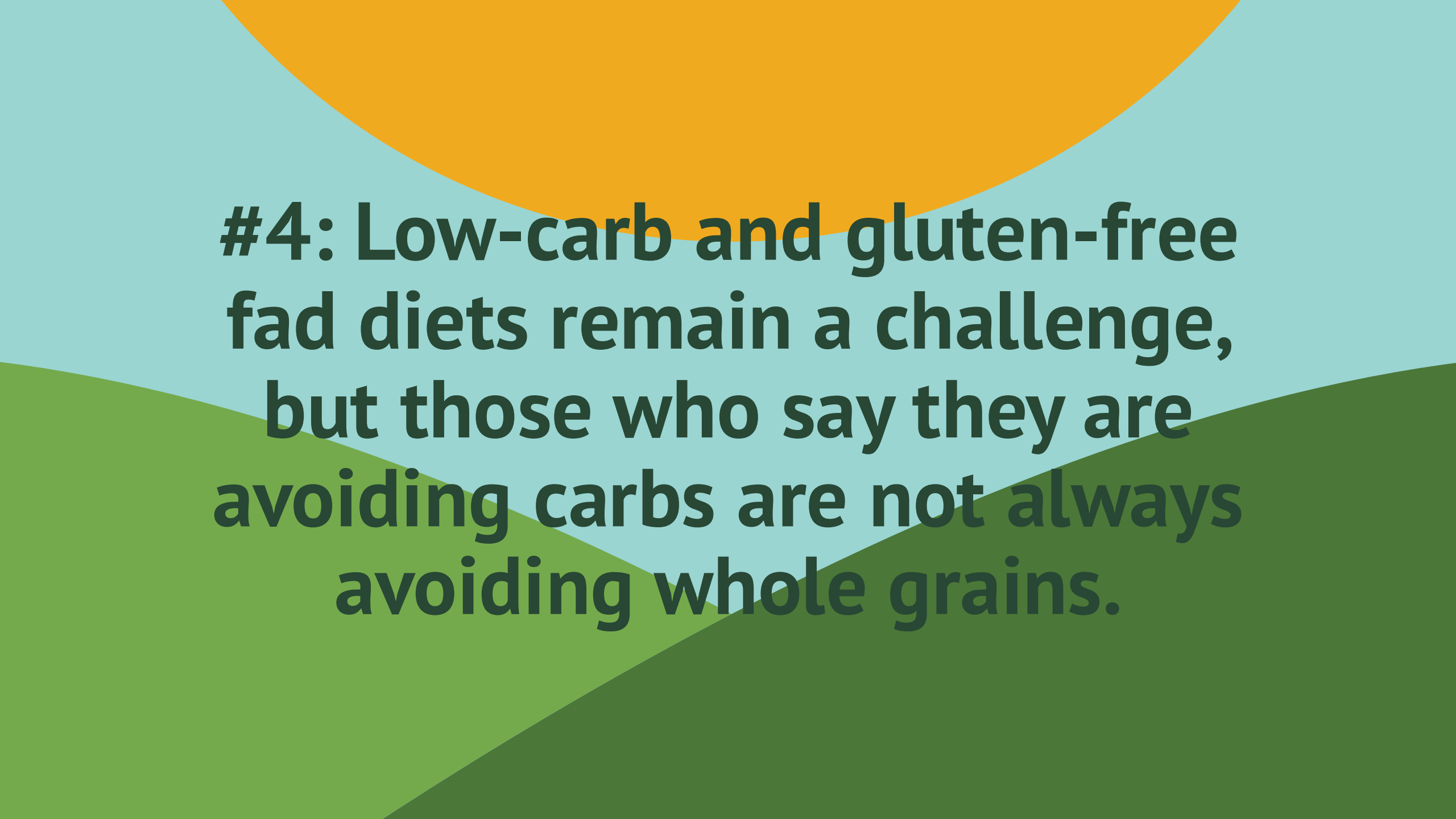
Schools should include more whole grain options in their meals.



People would have better health outcomes if they ate whole grains as part of every meal.



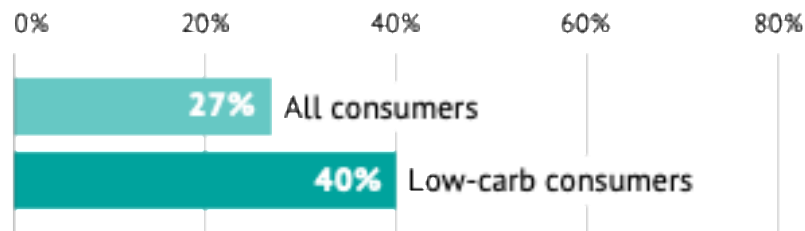
Support for this statement is striking (and exciting) – gone are the days when the conventional wisdom was that kids just don't like whole grains.



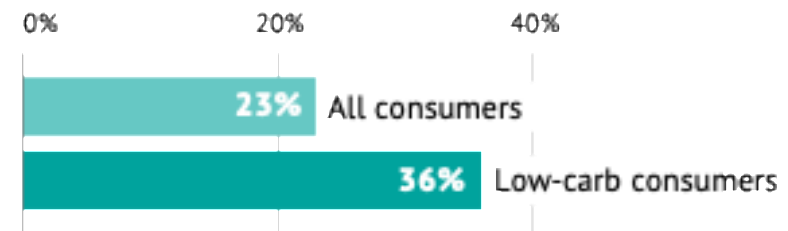
#4: Low-carb and gluten-free fad diets remain a challenge, but those who say they are avoiding carbs are not always avoiding whole grains.

While we often assume that **low-carb dieters** have lower whole grain consumption, those who said they avoid carbs are **more likely to:**

Look for high-fiber foods when shopping (Q2)



Nearly always choose to eat whole grains (Q6)



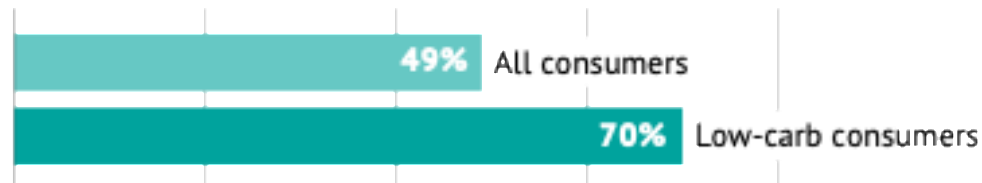
Look for whole grains when shopping (Q2)



Have increased their whole grain intake a great deal in the last five years (Q7)



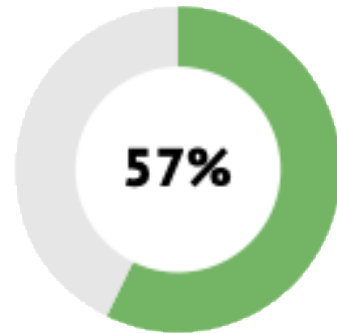
Say that healthy food is important to them (Q2)



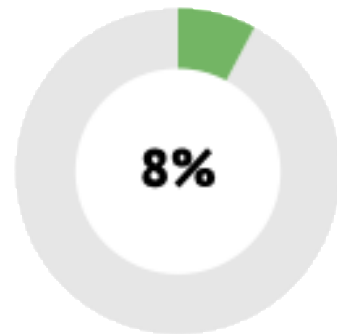
Over half of American consumers have **some** idea what **gluten is** – but few can fully define it correctly.

In the survey, there were two correct answers to the question “What is gluten?”

1. It’s a protein found in wheat, barley, and rye.
2. It helps bread dough stretch and rise.



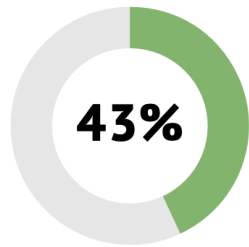
of consumers selected **one** of the correct answers



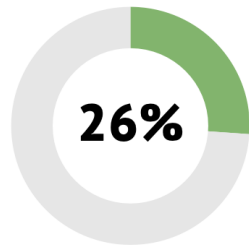
of consumers selected **both** correct answers
(and didn’t select any additional answers)

A quarter of consumers do not know what gluten is, and a growing number believe it is an unhealthy carbohydrate.

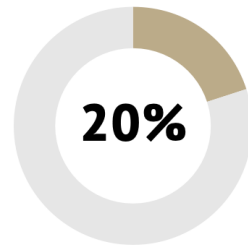
Consumers' definitions of gluten



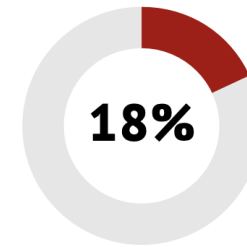
A protein found in wheat, barley, and rye



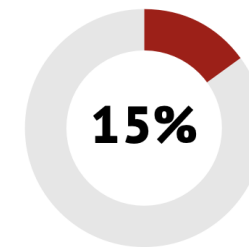
It helps bread dough stretch and rise



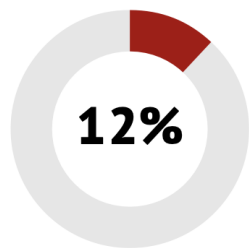
Don't know



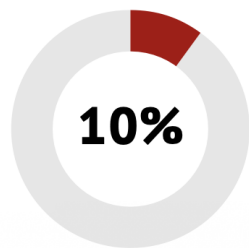
Something found in all grains



An unhealthy carbohydrate

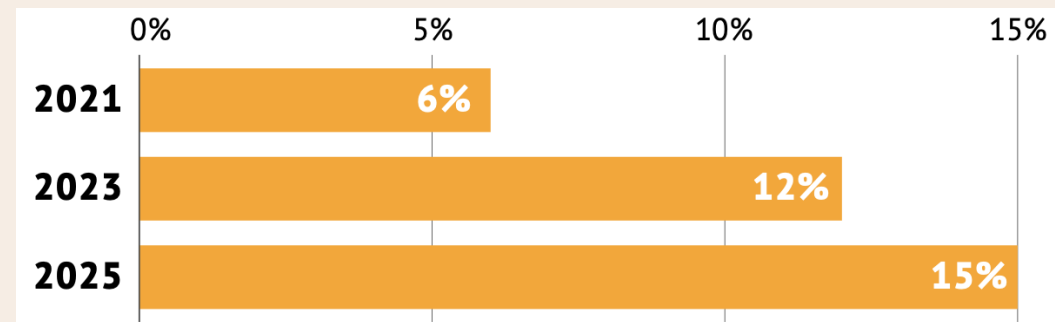


An unnatural substance found in GMO grains



A substance that makes you gain weight

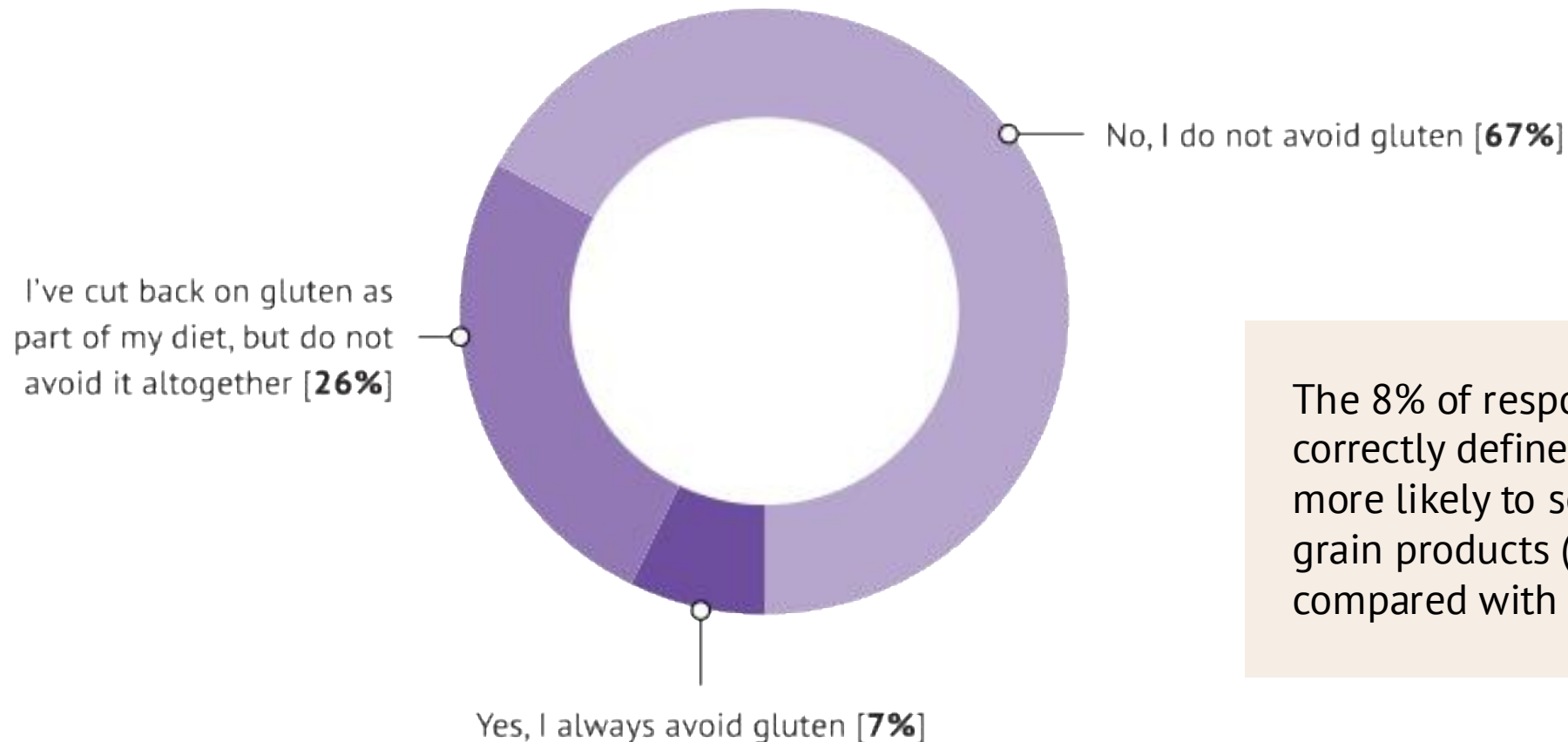
The number of people who (inaccurately) describe gluten as an unhealthy carb has steadily increased over the past five years.



93% of consumers eat gluten some or all of the time.

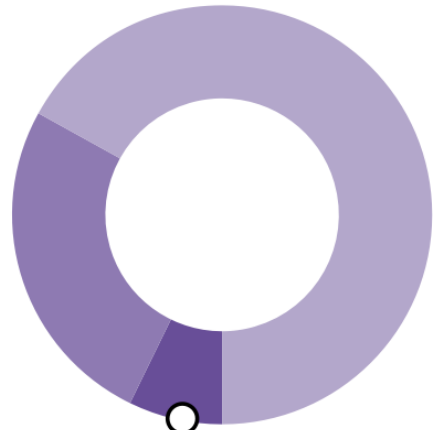
Parents were more likely to say they've cut back on gluten, but do not avoid it altogether [35%].

Gluten avoidance among consumers



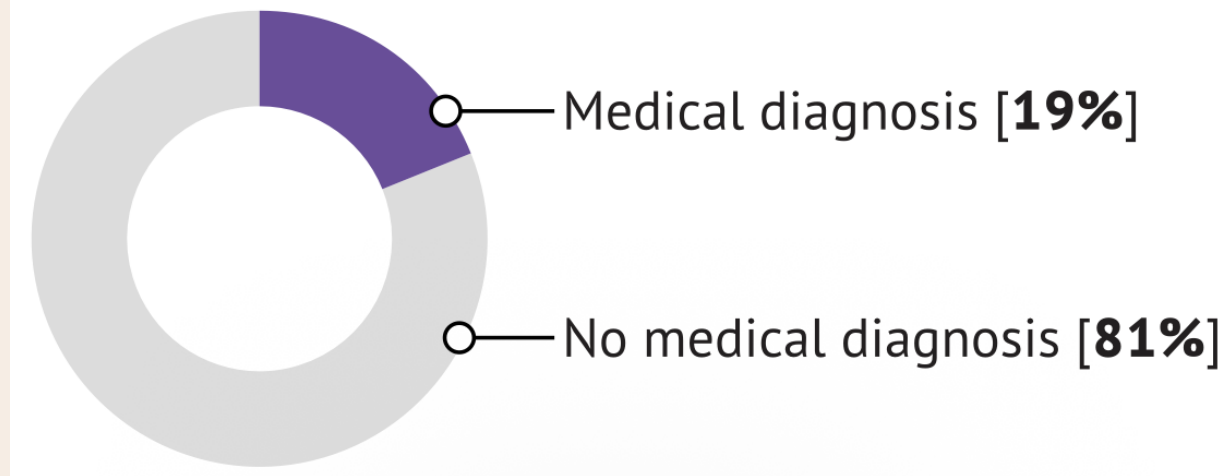
The 8% of respondents who correctly defined gluten are more likely to seek out whole grain products (46%, compared with 30% overall).

Over 80% of consumers who always avoid gluten are doing so without a medical diagnosis.




Yes, I always avoid gluten

Among the seven percent who always avoid gluten, fewer than **20%** have been medically diagnosed with a gluten problem.



- The medically diagnosed respondents make up 1.33% of all respondents, which lines up with the estimated prevalence of celiac disease in the general population.

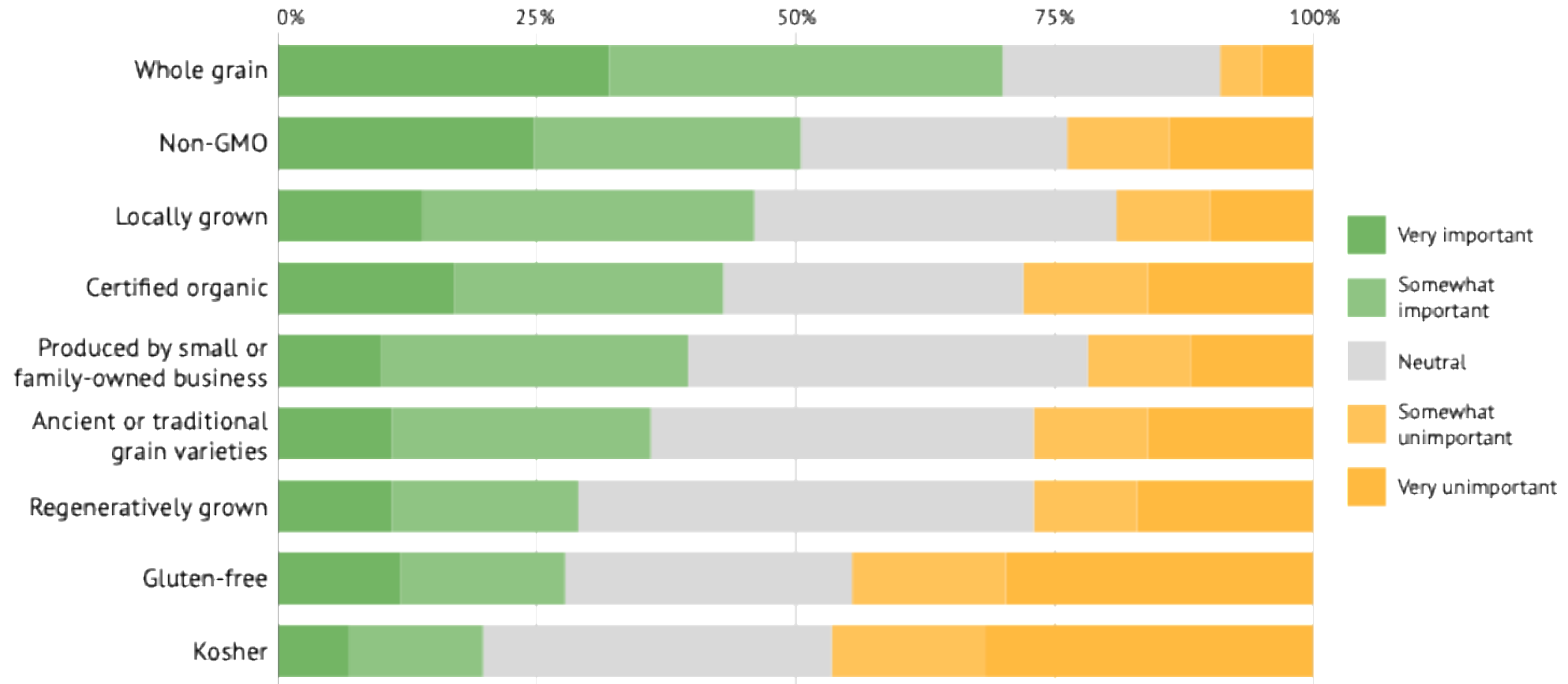
Note: People with a medically diagnosed gluten problem (such as celiac disease) must avoid even the smallest crumb of gluten-containing foods for a gluten-free diet to be effective.



#5: Consumer interest in sustainable production methods and alternative grain attributes are on the rise

When selecting grain products, consumers rank whole grain, non-GMO, locally grown, and certified organic as the most important attributes.

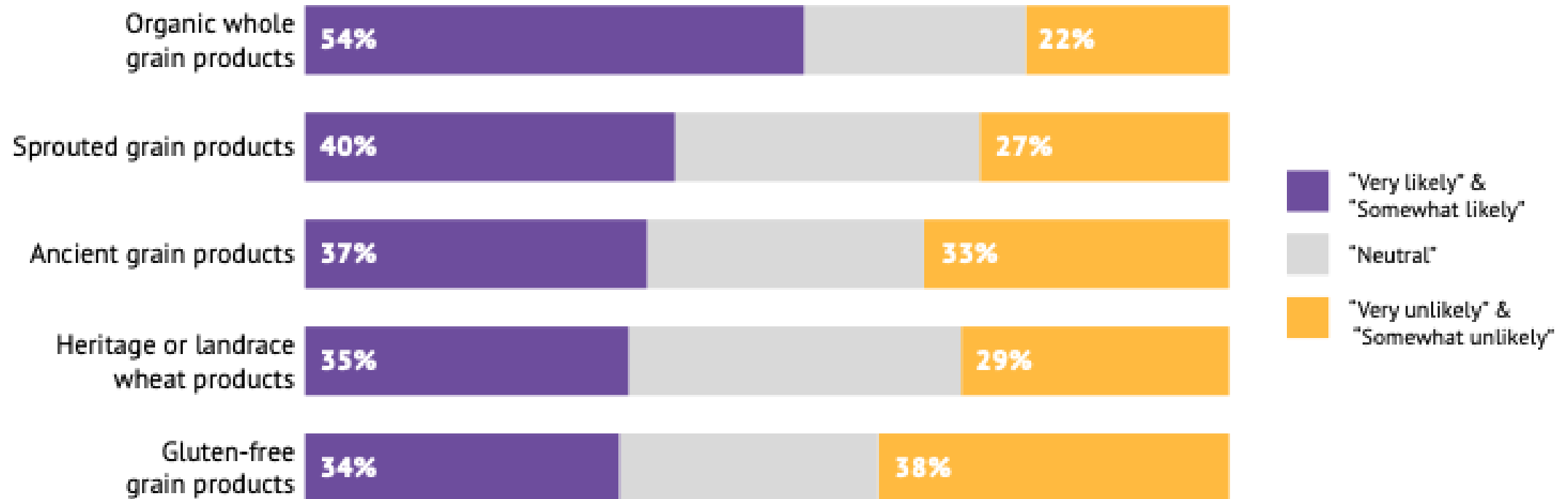
Grain attribute importance in decision-making



Consumers are most likely to shop for **organic and sprouted whole grain products**, with less interest in **ancient, heritage, and gluten-free grains**.

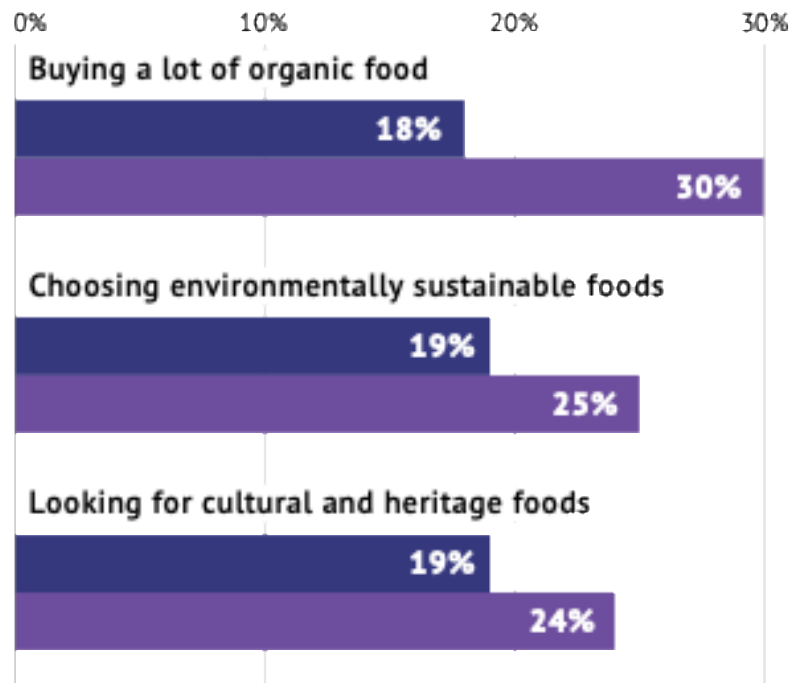
Interestingly, more consumers say they are unlikely to seek out gluten-free products than those who say they are likely to seek them out.

Consumer likeliness to purchase grain product types

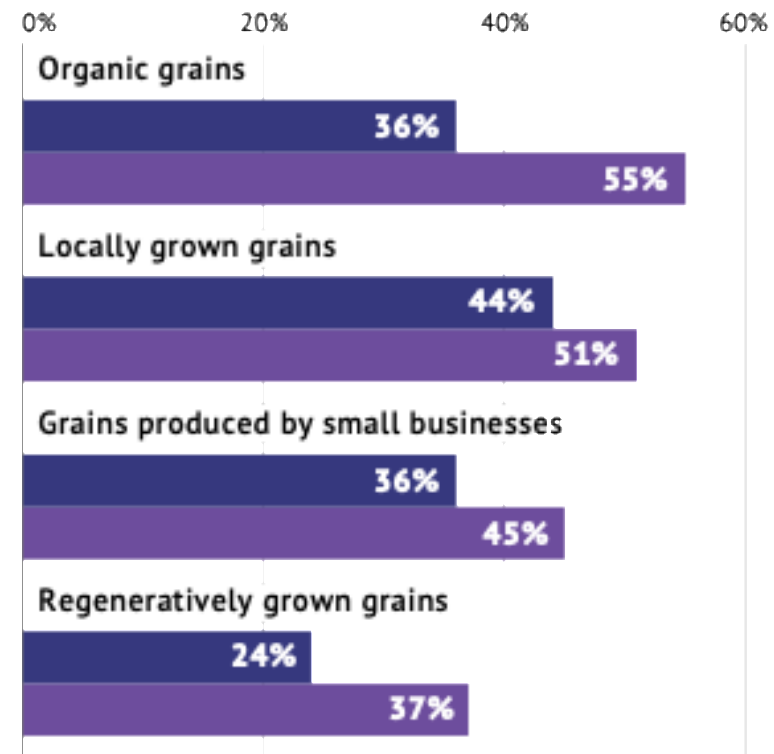


Younger consumers are much more interested in organic, sustainable, and cultural foods than older consumers.

Their purchasing decisions are much more likely to include (Q2):



When specifically considering grain foods, they are more likely to value (Q6a):

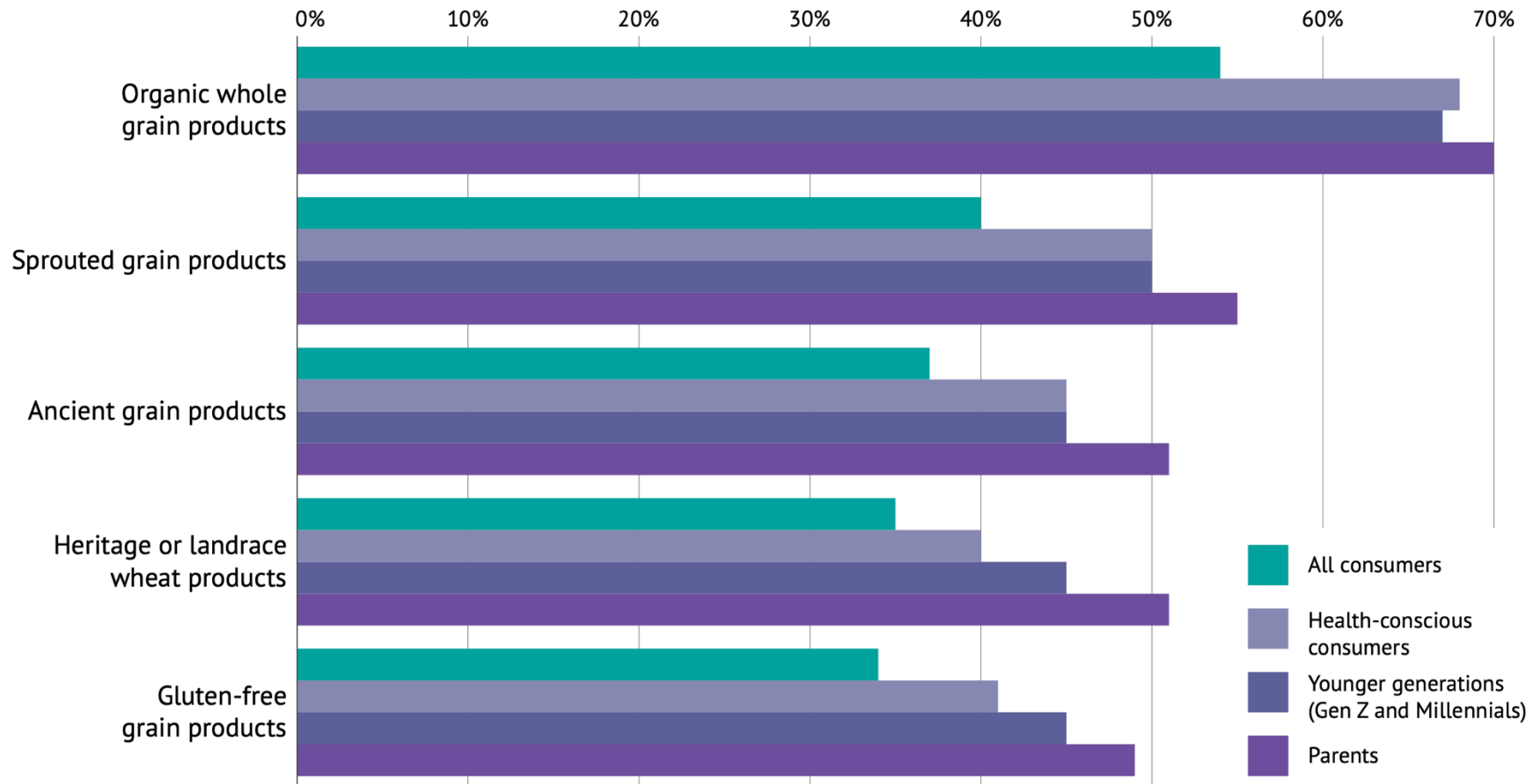


Older consumers (Gen X, Boomers, the Silent Generation)

Younger consumers (Gen Z and Millennials)

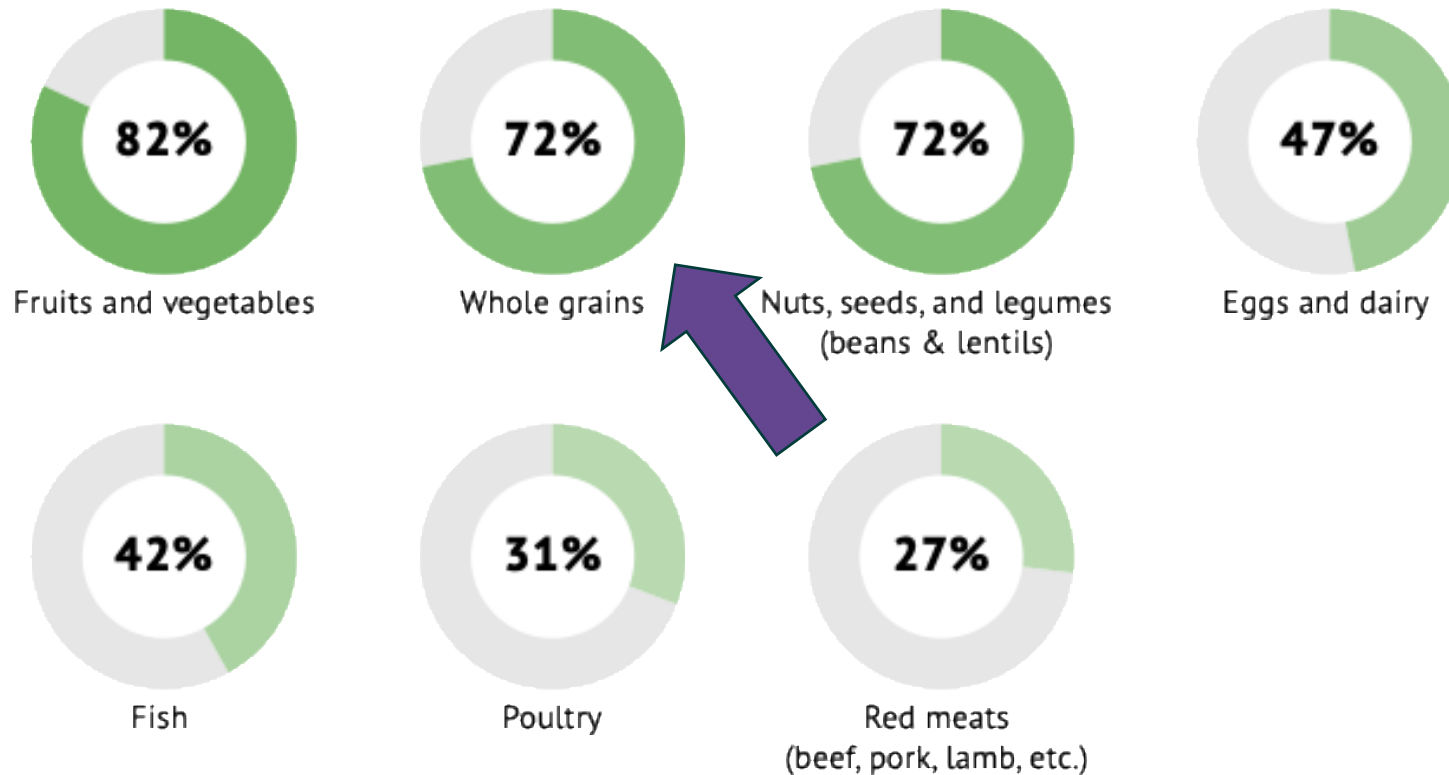
Parents, younger generations, and health-conscious consumers are more likely to seek out all of these grain products.

Consumers “very likely” and “somewhat likely” to purchase grain product types



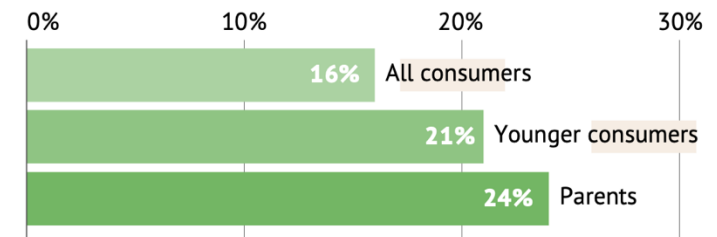
Significantly more consumers associate **whole grains** with **sustainability** this year—72% compared with 67% in 2021.

Foods perceived by consumers as sustainable and environmentally friendly



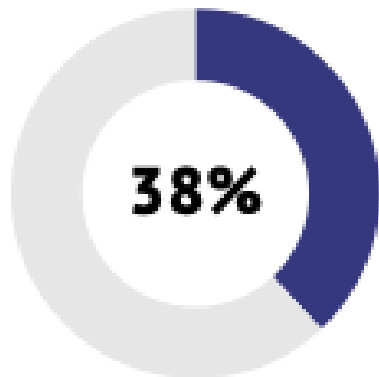
Sustainability is increasingly a motivation for choosing whole grains, especially for **younger consumers** (Gen Z and Millennials) and **parents**.

Percent of consumers who choose whole grains for sustainability reasons

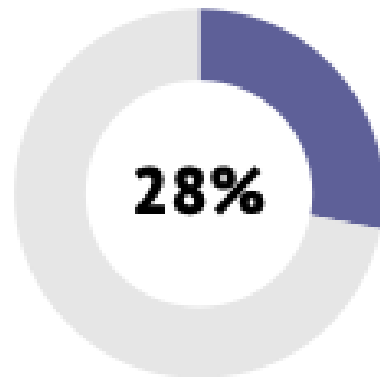


Two-thirds of consumers – 66% – try to eat foods that are less processed, with one-third preferring whole grains for that reason.

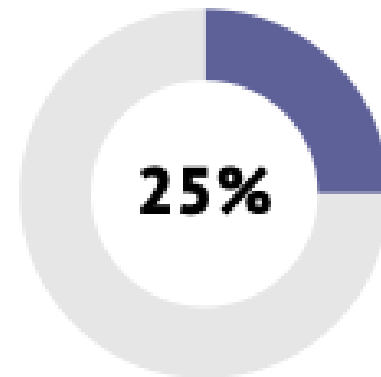
Consumer processed grain food preferences



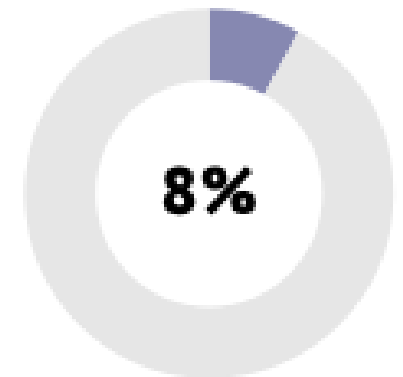
I prefer whole grain foods because they are less processed than their refined counterparts.



I try to eat fewer processed foods, but I didn't realize whole grains are less processed than their refined counterparts.



I don't pay much attention to how processed my grain foods are.

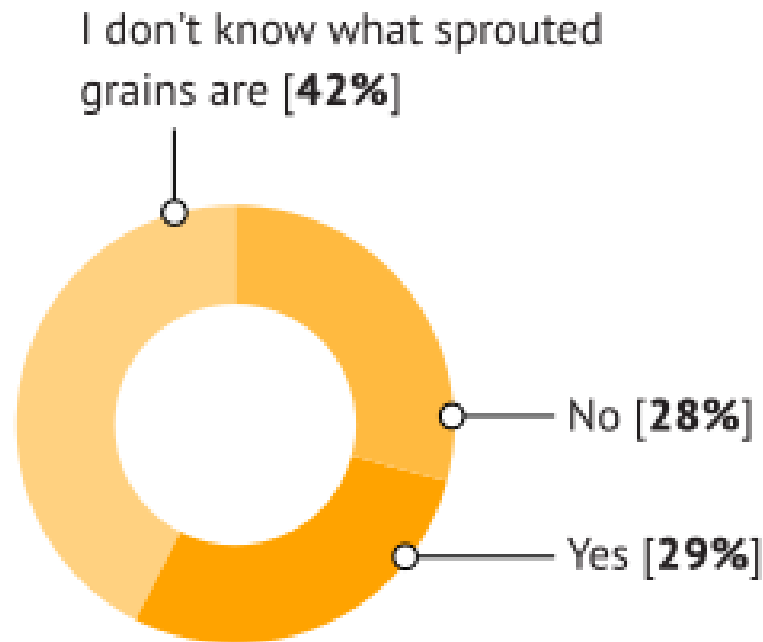


I prefer refined grain foods, even though they are more processed.

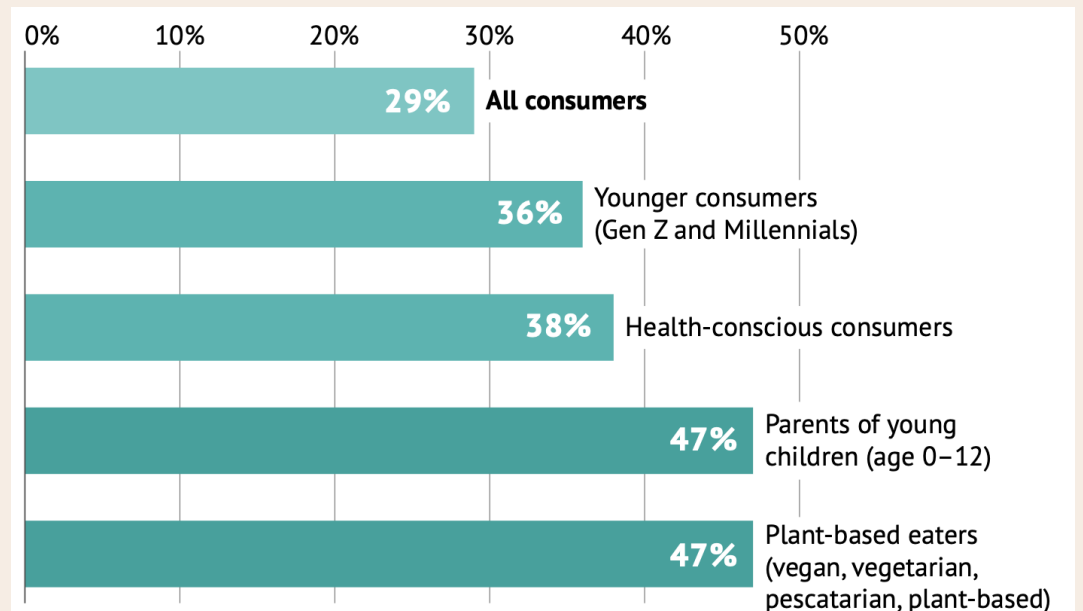
About a quarter of consumers know about sprouted grains and seek them out.

These numbers have remained steady over the past several years.

Percentage of consumers who eat/buy products made with sprouted grains



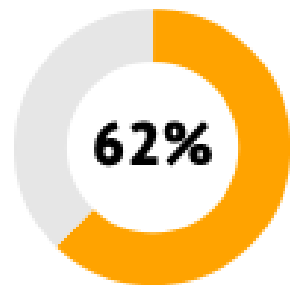
Significantly more consumers in the following demographic groups reported seeking out sprouted grains:



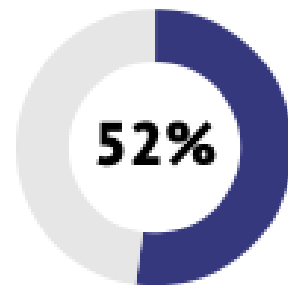
Those familiar with sprouted grains are recognizing their **digestibility benefits** far more. In 2021, 44% cited it as a reason and now 52% do.

Significantly more also cite reduced phytates as a benefit (34% in 2025 compared with 26% in 2021).

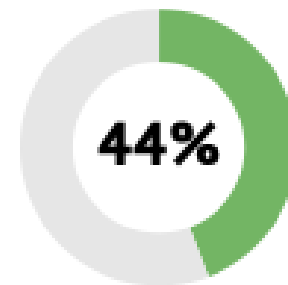
Reasons for choosing sprouted grains



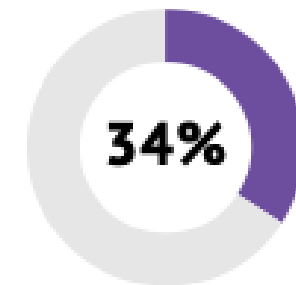
Flavor and taste



Digestibility



Bioavailability
of nutrients



Reduced anti-nutrients/
phytates

Frequency with which consumers of sprouted grains choose them



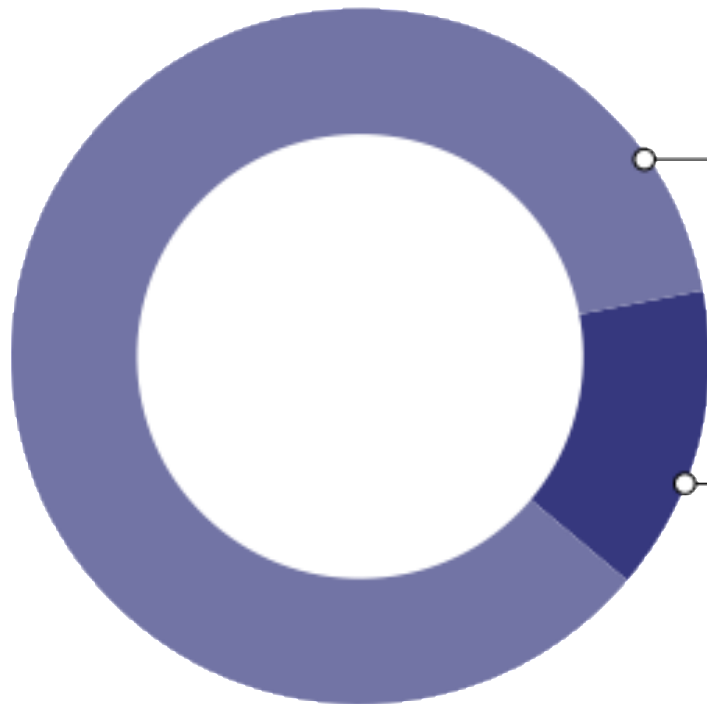
22%
I nearly always choose
sprouted grains whenever
they are available.

42%
I choose sprouted grains
about half the time.

36%
I occasionally choose sprouted grains.

The vast majority of consumers are omnivores.

Consumer eating habits and preferences



Omnivore (I eat plants, meats, seafood, eggs and dairy) [86%]

Plant-Based (I don't necessarily eliminate animal products, but focus on eating mostly plants, such as fruits, vegetables, whole grains, legumes, etc.) [4%]

Pescatarian (I don't eat meat, but I do eat seafood, along with plants, eggs and dairy) [3%]

Vegetarian (I don't eat meat or seafood, but I eat plants, eggs and dairy) [3%]

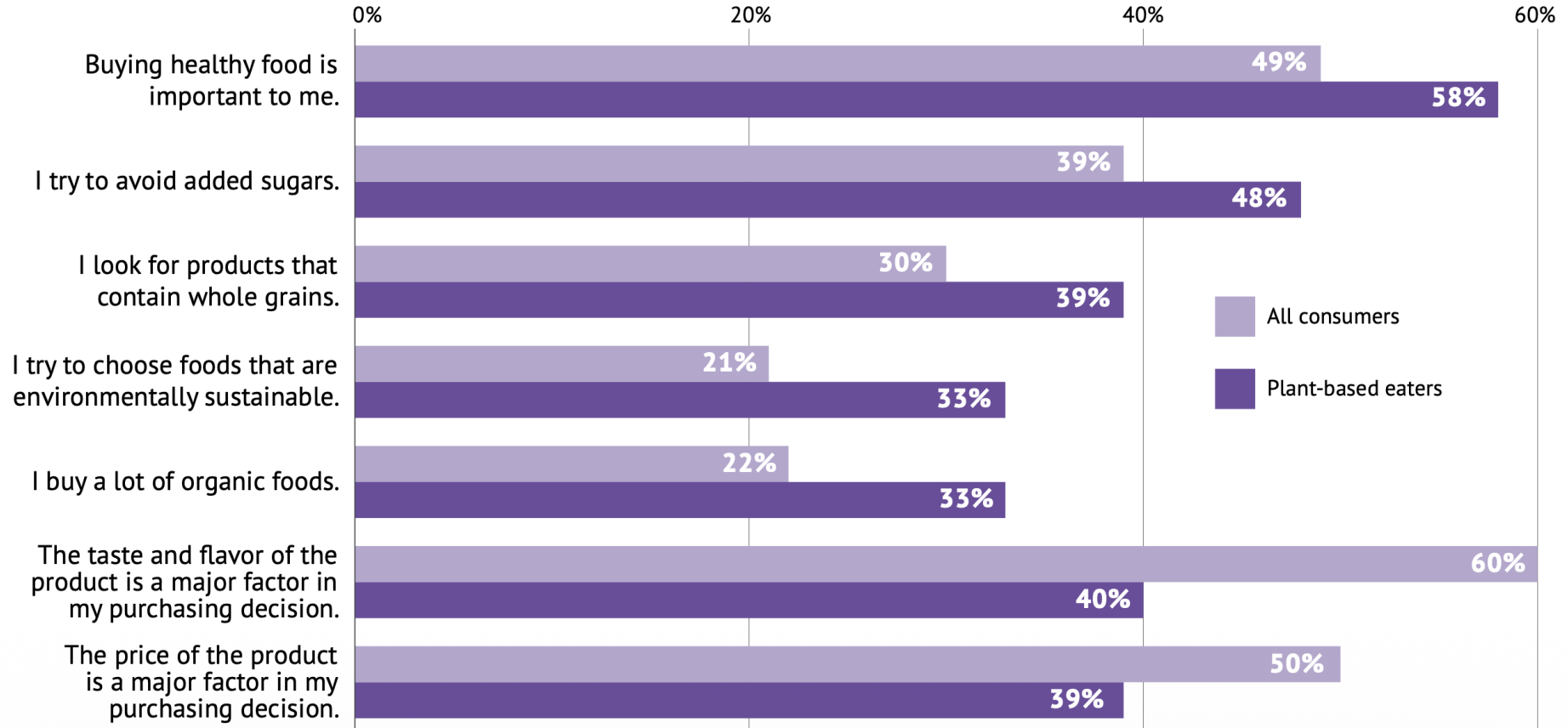
Keto / Paleo (I restrict grain foods in my diet) [2%]

Vegan (I don't eat any animal products, meaning no meat, seafood, eggs, or dairy) [1%]

Consumers who eat a plant-based diet prioritize foods that are healthy, whole grain, sustainable, or organic.

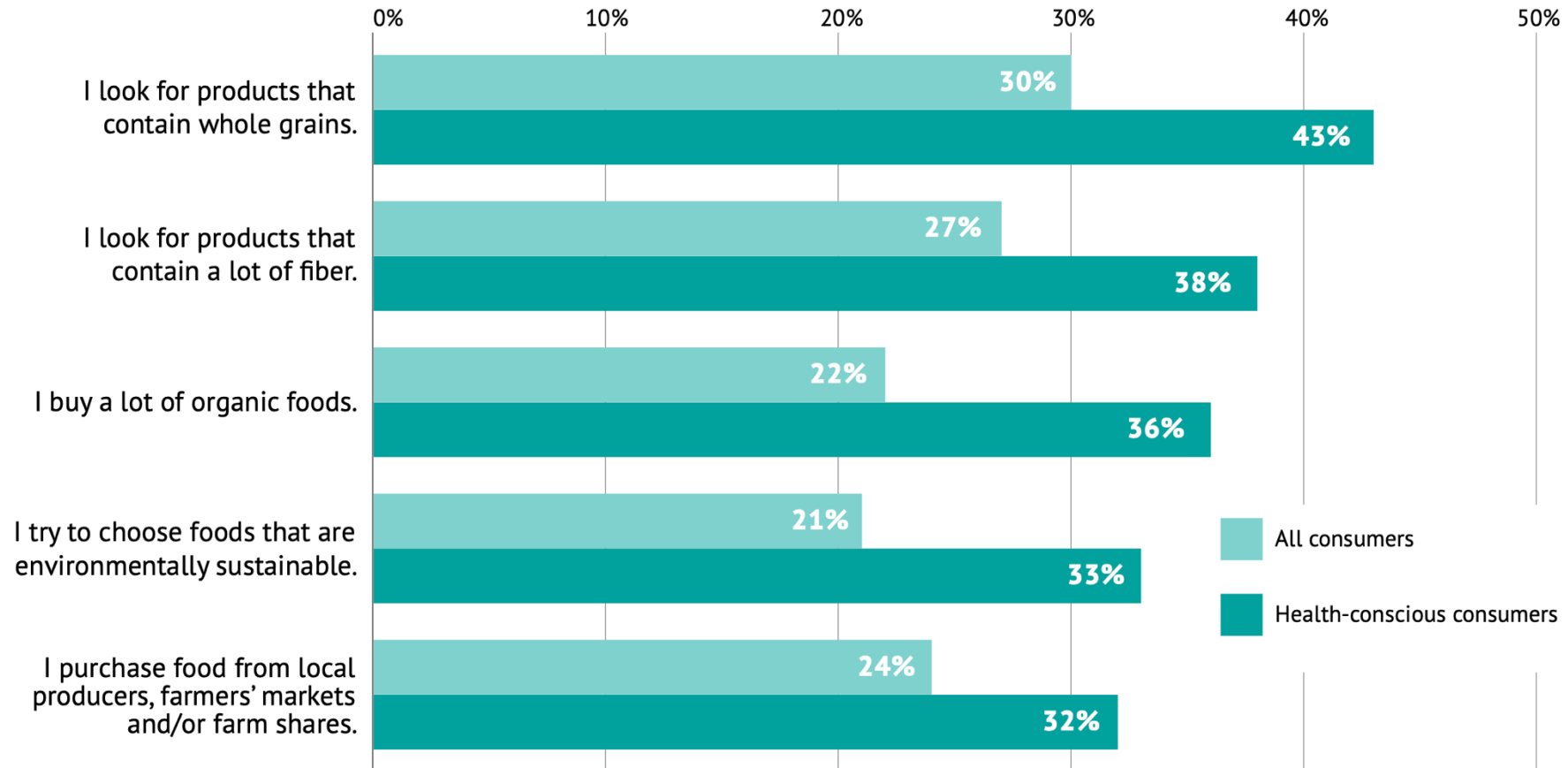
Flavor and price are less of a concern.

Purchasing decisions of plant-based eaters



Consumers who are health-conscious also look for whole grain, organic, or sustainable foods. They buy from local producers more frequently.

Purchasing decisions of consumers who say that healthy food is important to them

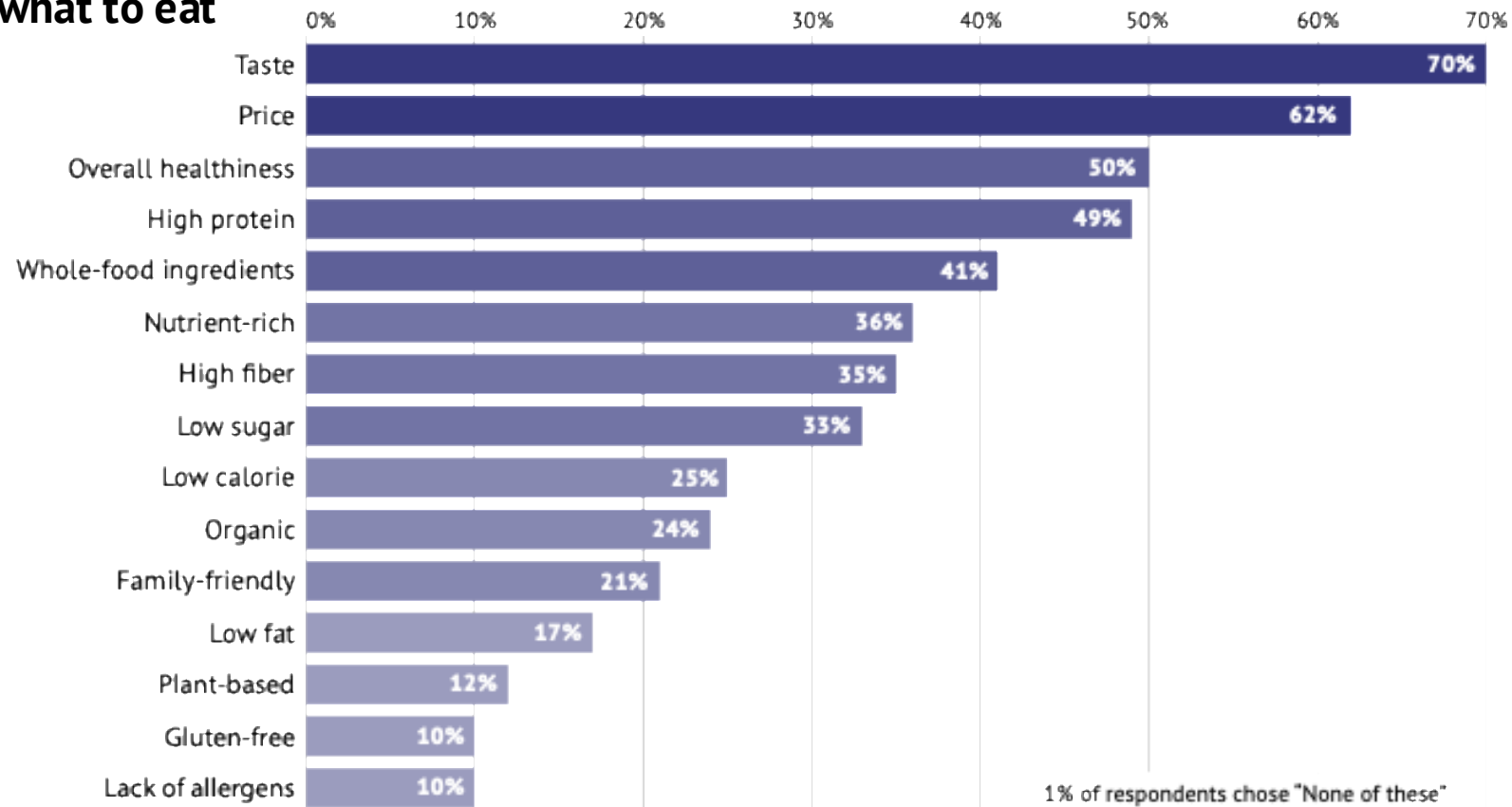




#6: Other food and cooking trends

When deciding what to eat, consumers most commonly consider **taste, price, healthiness, protein, and whole-food ingredients.**

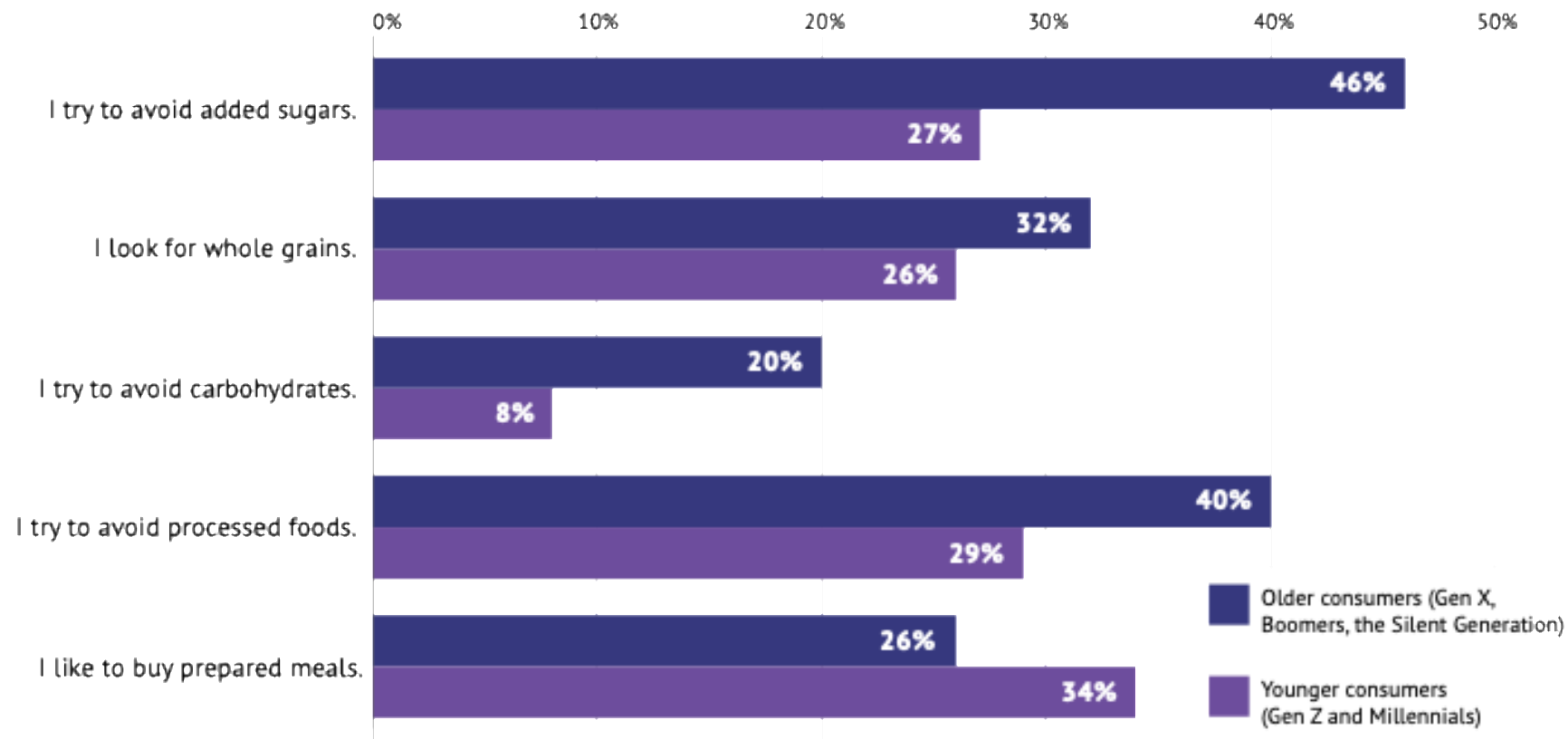
Percentage of consumers who marked each factor as one of the top five that they consider when deciding what to eat



Older consumers are more likely than younger consumers to avoid added sugar, carbohydrates, and prepared meals when shopping.

They also look for whole grains and avoid processed foods.

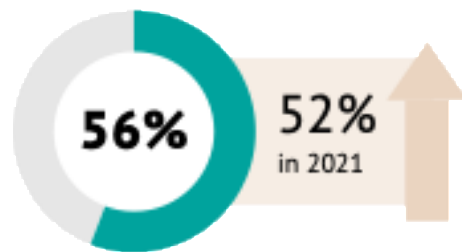
Comparing purchasing decisions, younger versus older consumers



Over the past five years, significantly more people report eating more home-cooked meals.

Parents are even more likely to say they are eating more home-cooked meals [68%], as well as doing more baking at home [34%] and using meal kits [13%].

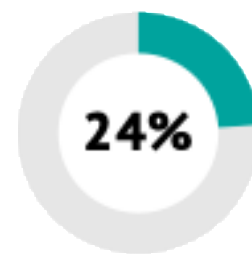
Changes in eating/cooking habits in the past 5 years



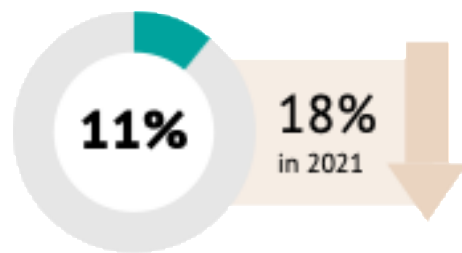
I eat more home-cooked meals



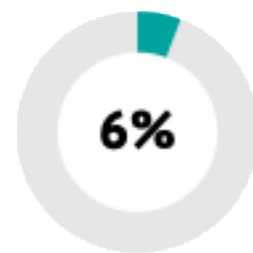
My habits have not changed



I am doing more baking at home



I order more takeout



I use more meal kits/food subscription services

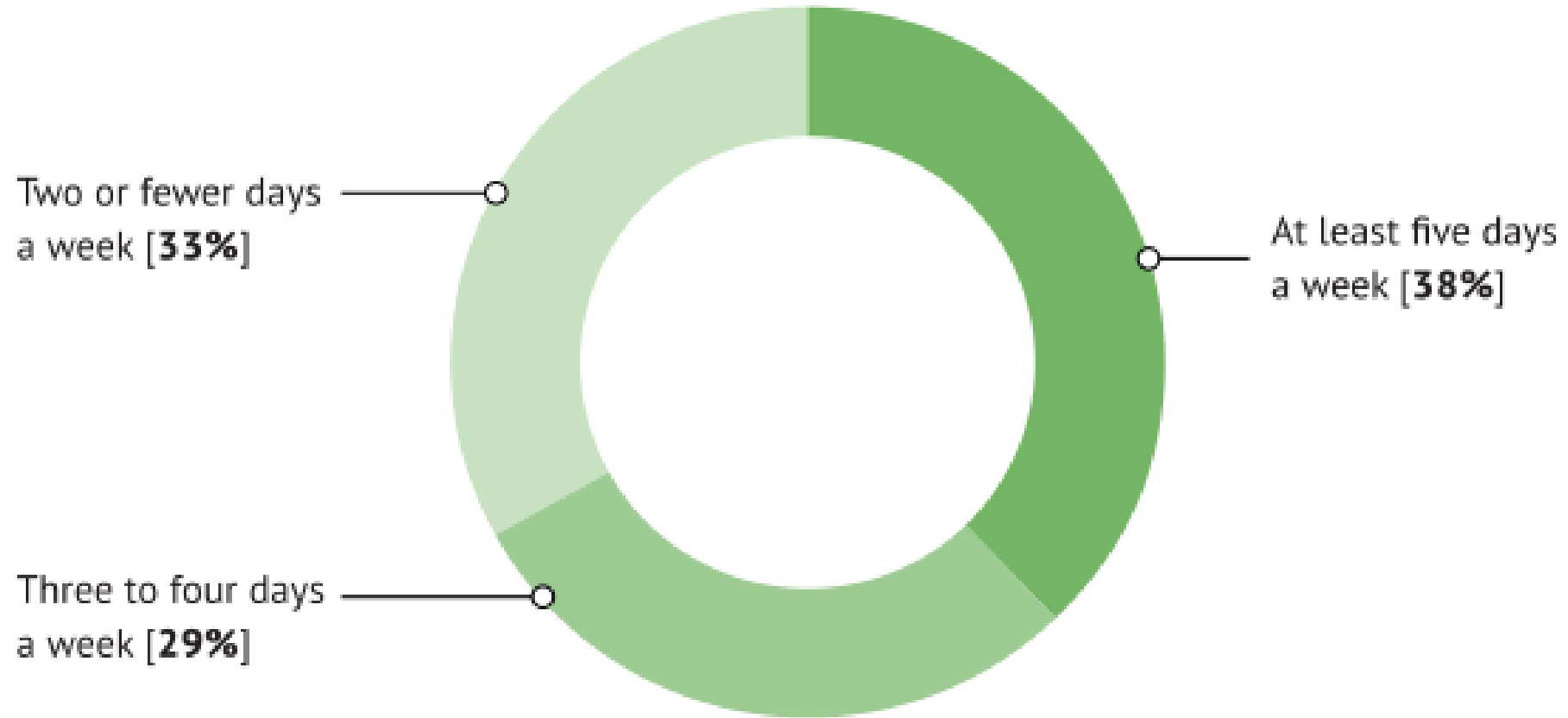
Older generations (Gen X, Boomers, and Silent Generation) are more likely to say their eating and cooking habits have not changed [34%].

Younger generations (Gen Z and Millennials) are more likely to say they are:

- eating more home-cooked meals [62%]
- doing more baking at home [32%]
- ordering more takeout [17%]
- using more meal kits [12%]

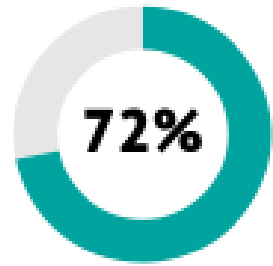
Two-thirds of consumers eat a home-cooked dinner at least three days a week.

Frequency with which consumers cook dinner from scratch

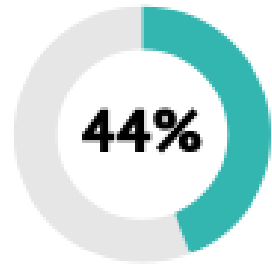


Family, restaurant meals, and friends are the most influential sources of meal and recipe inspiration for consumers.

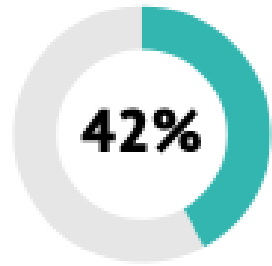
Percentage of consumers who marked each influence as one of their top three



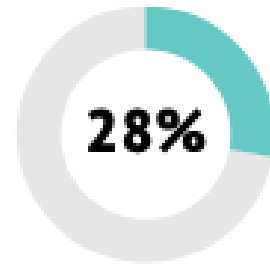
Family



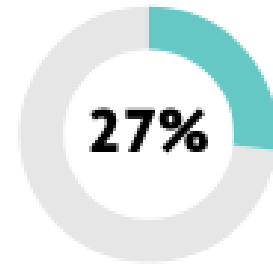
Restaurant meals



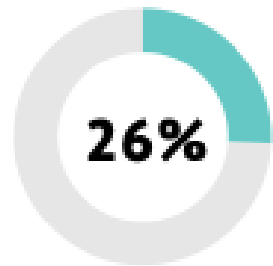
Friends



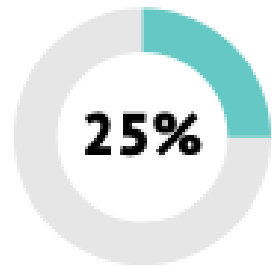
TV cooking
show hosts



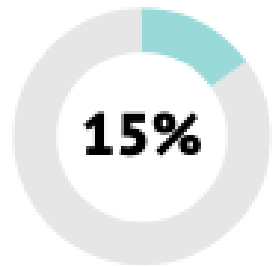
Cookbook authors



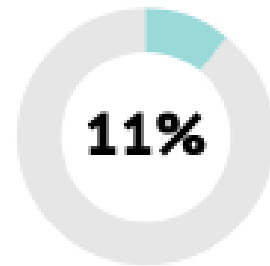
Nutritionists
or dietitians



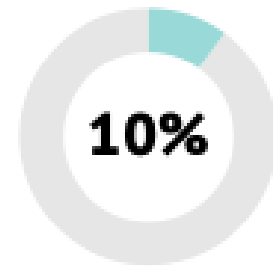
Social media
influencers



Food bloggers



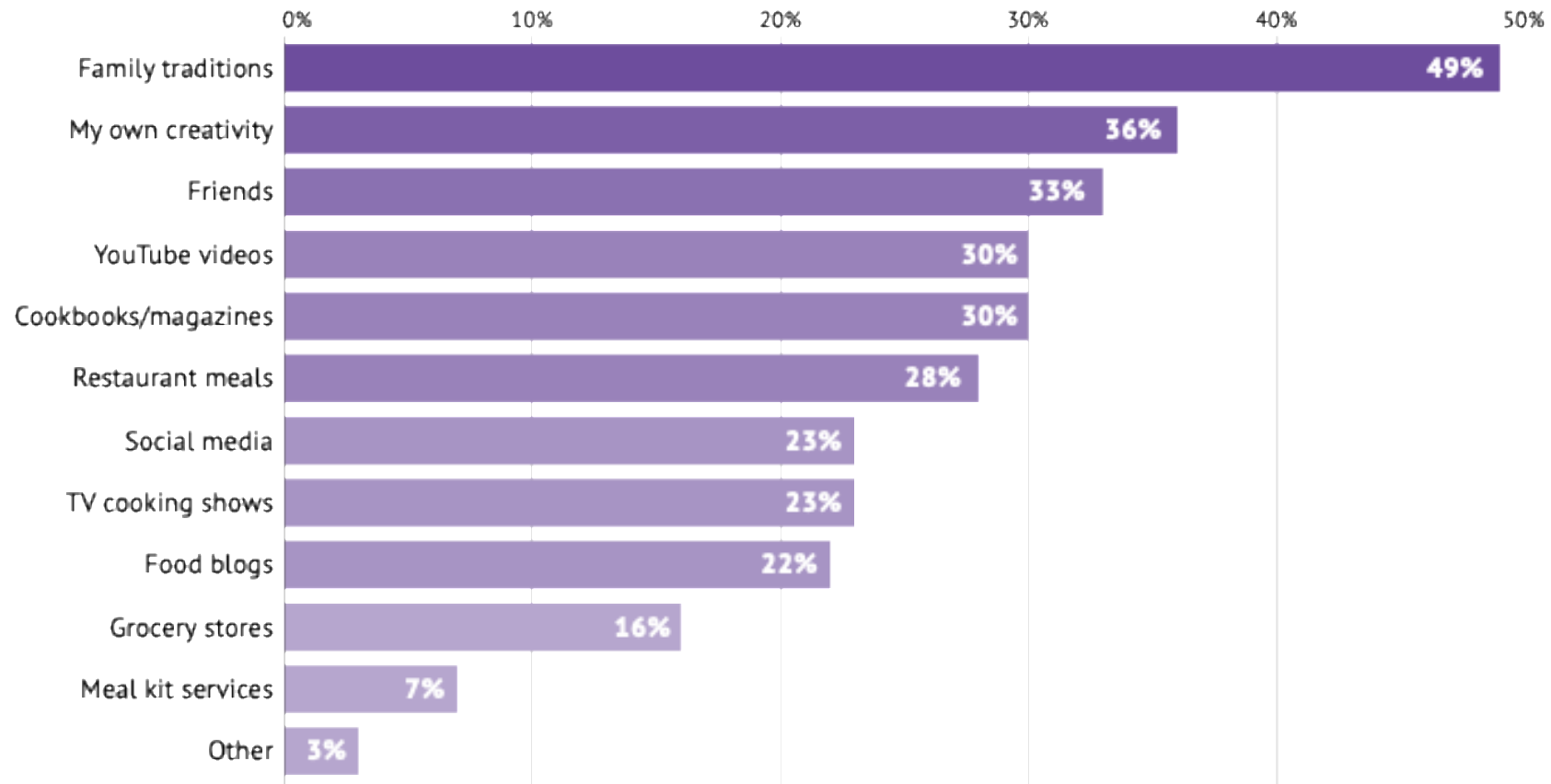
Other



Celebrity chefs

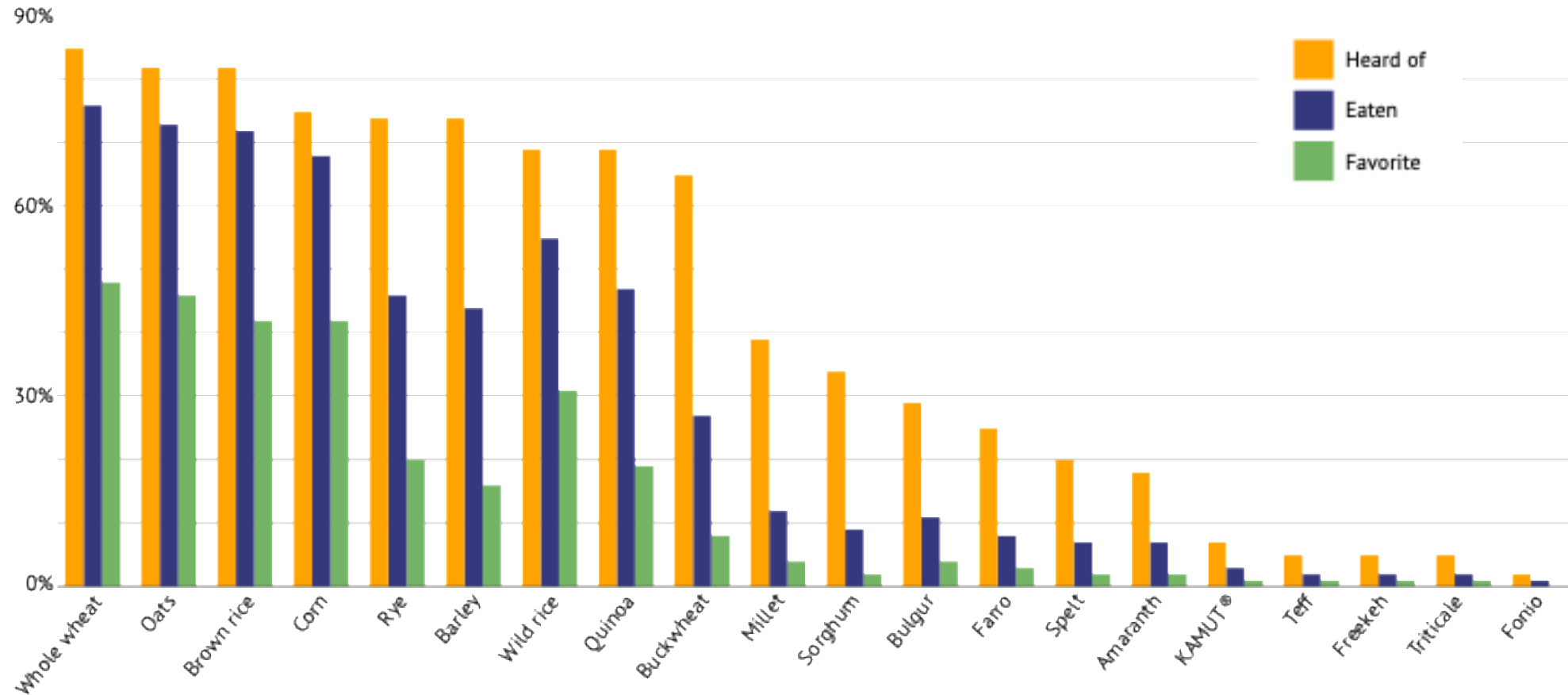
Consumers' meal ideas and recipes are most commonly inspired by family traditions, their own creativity, and friends.

Percentage of consumers who marked each inspiration as one of their top three



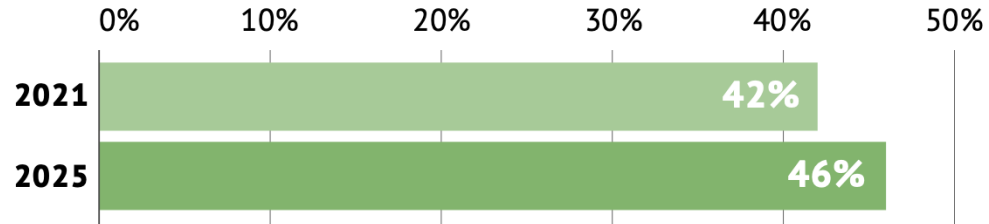
Whole wheat, oats, and brown rice are the most well-known grains overall. Quinoa is the most well-known “ancient grain.”

Percentage of consumers selecting each grain they’ve heard of, eaten, and consider a favorite

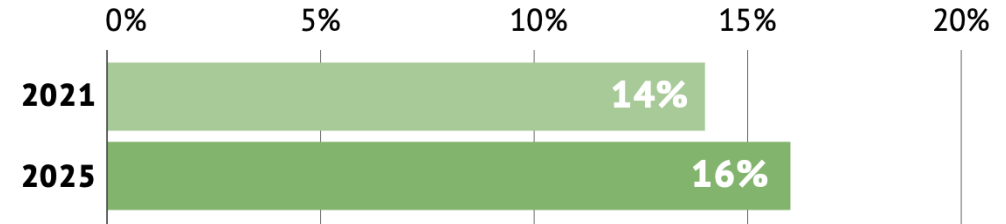


Compared to 2021, more consumers say that **oats**, **corn**, **barley**, and **buckwheat** are their favorite grains.

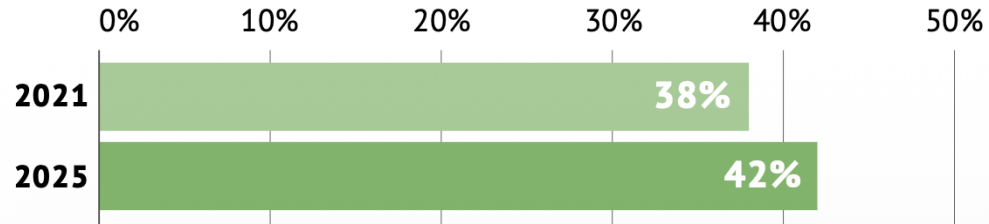
Oats



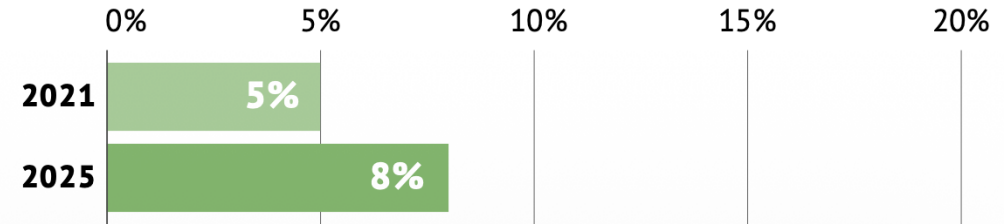
Barley



Corn

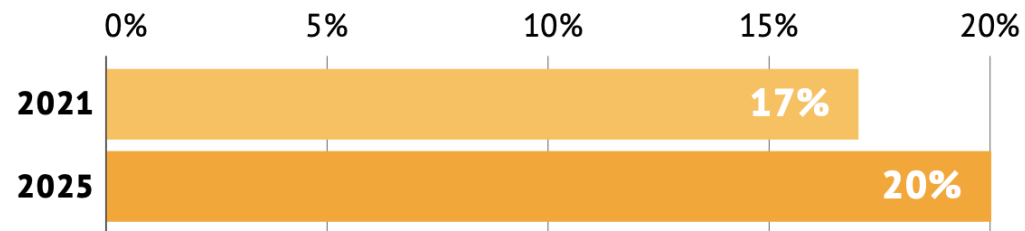


Buckwheat

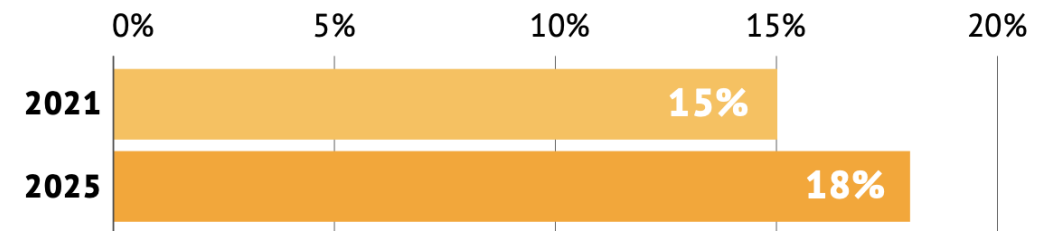


Compared to 2021, more consumers have heard of **spelt** and **amaranth**.

Spelt



Amaranth





Profile of Whole Grain Stamp Enthusiasts

Demographic Profile of Whole Grain Stamp Enthusiasts

- ➔ More likely to be young (Gen Z and Millennials) *[45% of Stamp enthusiasts, compared with 34% of consumers overall]*
- ➔ SIGNIFICANTLY more likely to be parents *[44% of Stamp enthusiasts have children under 18 in their household, compared with 32% of consumers overall]*
- ➔ More likely to be Black or Latinx *[40% of Stamp enthusiasts, compared with 33% of consumers overall]*
- ➔ More likely to follow some kind of plant-based diet (vegan, vegetarian, pescatarian, or plant-based) *[17% of Stamp enthusiasts compared with 11% overall]*

What They Look For When Shopping

Those who actively seek out the Whole Grain Stamp are more likely to...

- ➔ Actively seek out whole grains
- ➔ Look for high-fiber foods
- ➔ Buy healthy food
- ➔ Say they care where/how their food was grown/produced
- ➔ Buy organic food
- ➔ Choose foods for sustainability reasons
- ➔ Buy from farmers' markets and local producers

They are less likely to...

- ➔ Say taste and flavor are major influences on their purchasing
- ➔ Stick to eating foods they're familiar with
- ➔ Be highly price-sensitive

Stamp Enthusiasts and Whole Grains

These shoppers are more likely to...

- ➔ Say they choose whole grains at least half the time
- ➔ Choose whole grains for environmental reasons
- ➔ Say they are in the habit of choosing whole grains
- ➔ Say they find it “very easy” to identify whole grain foods
- ➔ Be familiar with other lesser-known whole grains
- ➔ Be familiar with sprouted grains
- ➔ Choose whole grain options whenever available at restaurants

Stamp Enthusiasts and Whole Grains

Additionally...

- ➔ Their consumption of whole grain foods across **every category** (e.g. breads, pastas, cereals, crackers, tortillas, pizza crusts, etc.) is **significantly higher** than respondents overall *AND* they are still much more likely to say they want to eat significantly more whole grains than they already do
- ➔ 89% of Stamp enthusiasts say they want the whole grain content of foods (grams of whole grain) displayed on product packaging *[compared with 77% of consumers overall]*
- ➔ 79% of these shoppers say that *not* seeing the Stamp makes them question a product's whole grain claims *[this is true of 56% of all shoppers]*

Additional Characteristics

Those who actively seek out the Stamp are also more likely to...

- ➔ Eat a lot of home-cooked meals and bake frequently
- ➔ Exercise regularly and use eco-friendly products
- ➔ Read the Nutrition Facts Panels on products they're buying
- ➔ Look for and trust third-party labeling

Spotlight on Local Grains

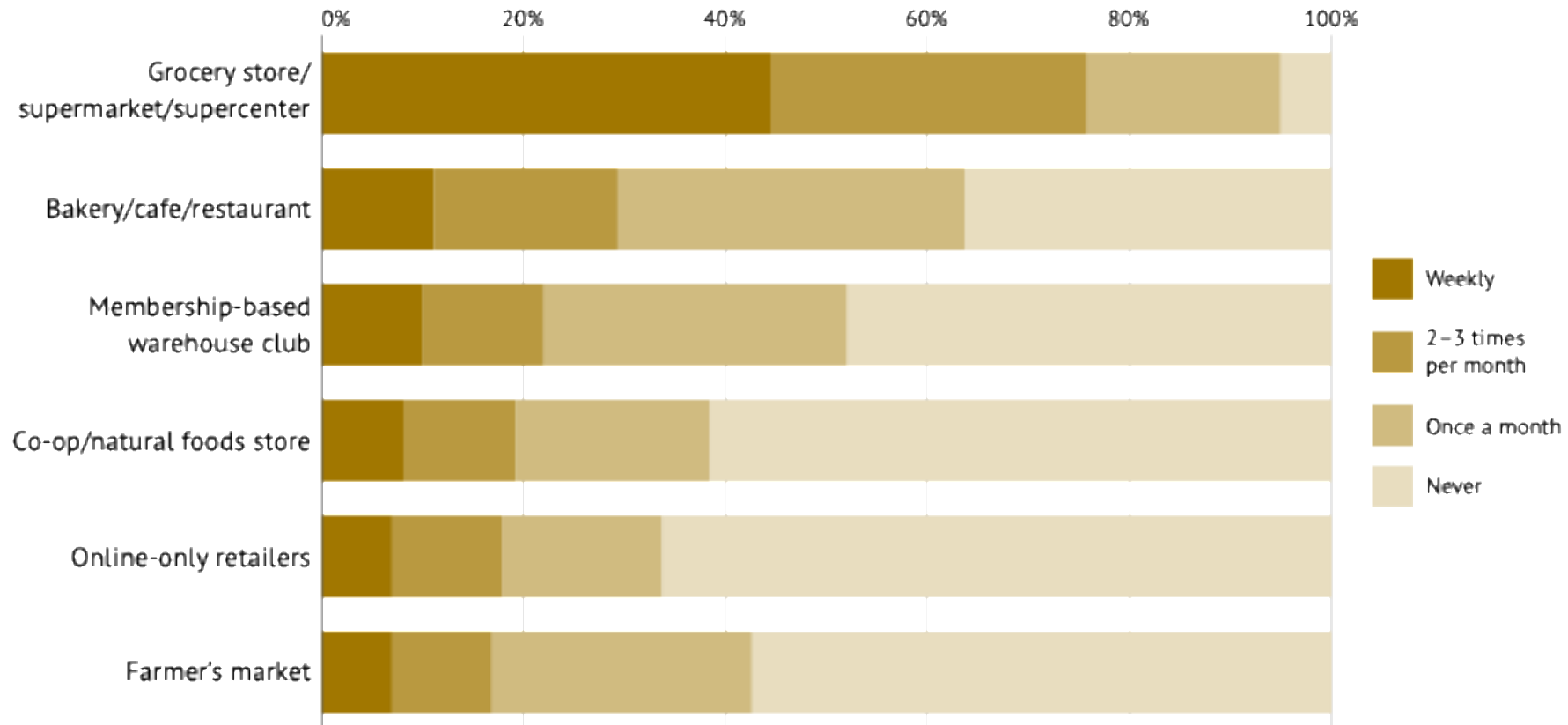


UNIVERSITY OF MINNESOTA

The majority of consumers shop most frequently for grain products at **supermarkets**.

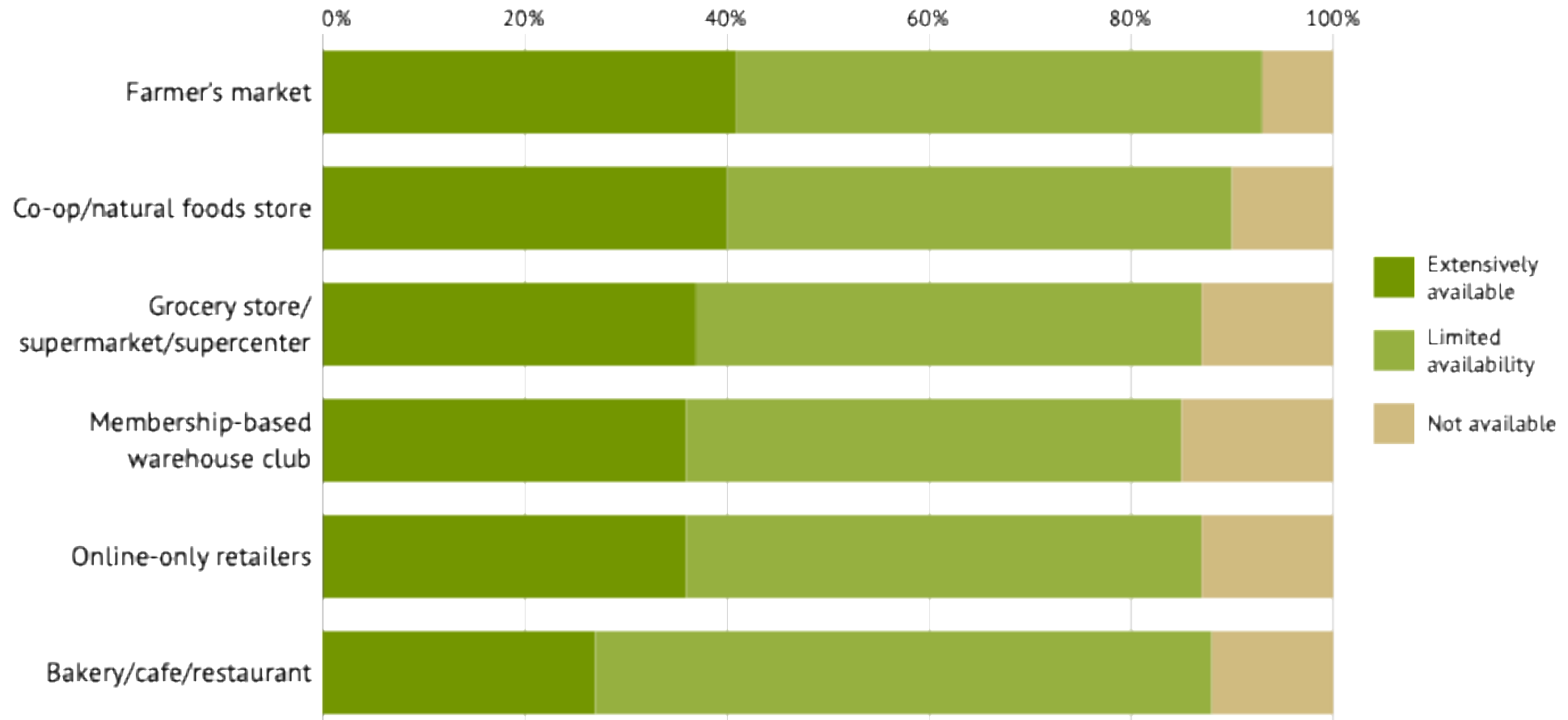
Although few consumers shop weekly for grain products at farmer's markets, 43% of consumers report buying grains products at a farmer's market at least once a month.

Grain purchase frequency by location



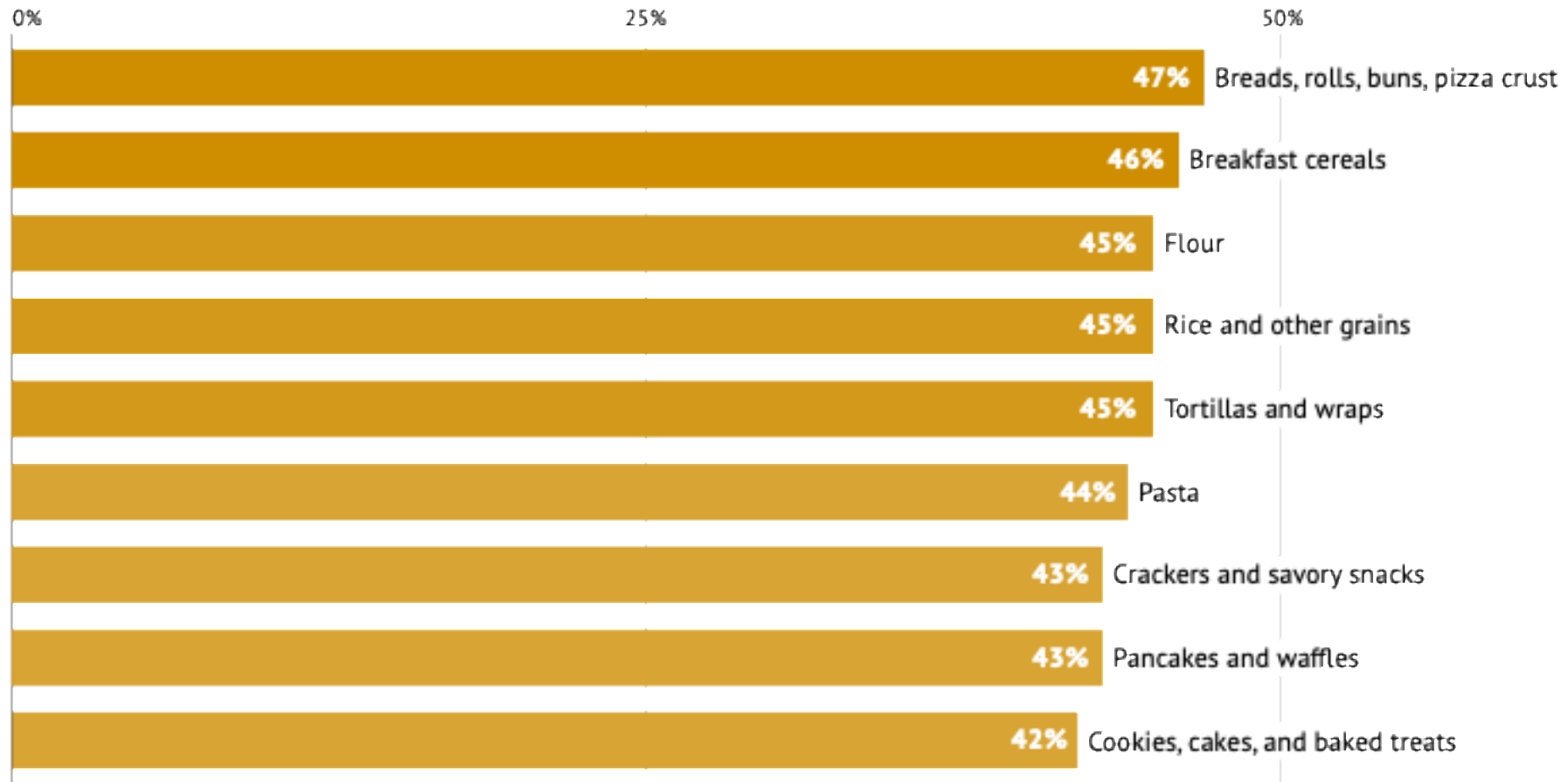
Consumers find local grains most often at farmer's markets and co-ops.

Local grain availability by location



Consumers are interested in **local versions of all grain products** with no preference for a certain type of grain food.

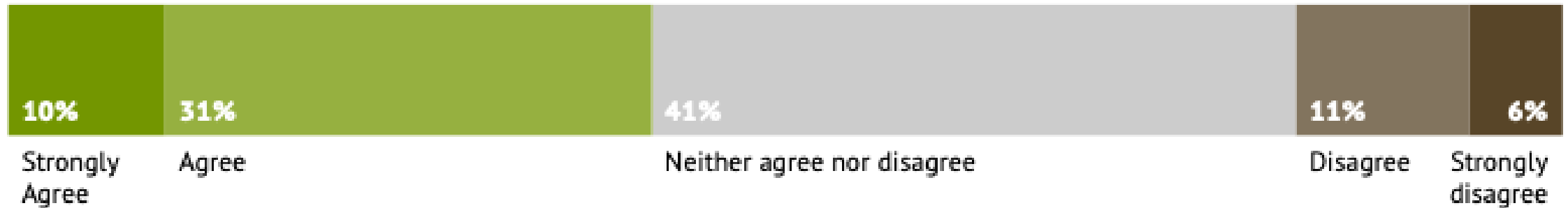
Frequency with which consumers say they choose the local grain version of a food when available



Over 40 percent of consumers value grain products made with local grains.

An equal number of consumers expressed ambivalence toward local grains; these may be consumers who would be receptive to outreach and education about the value of local grains.

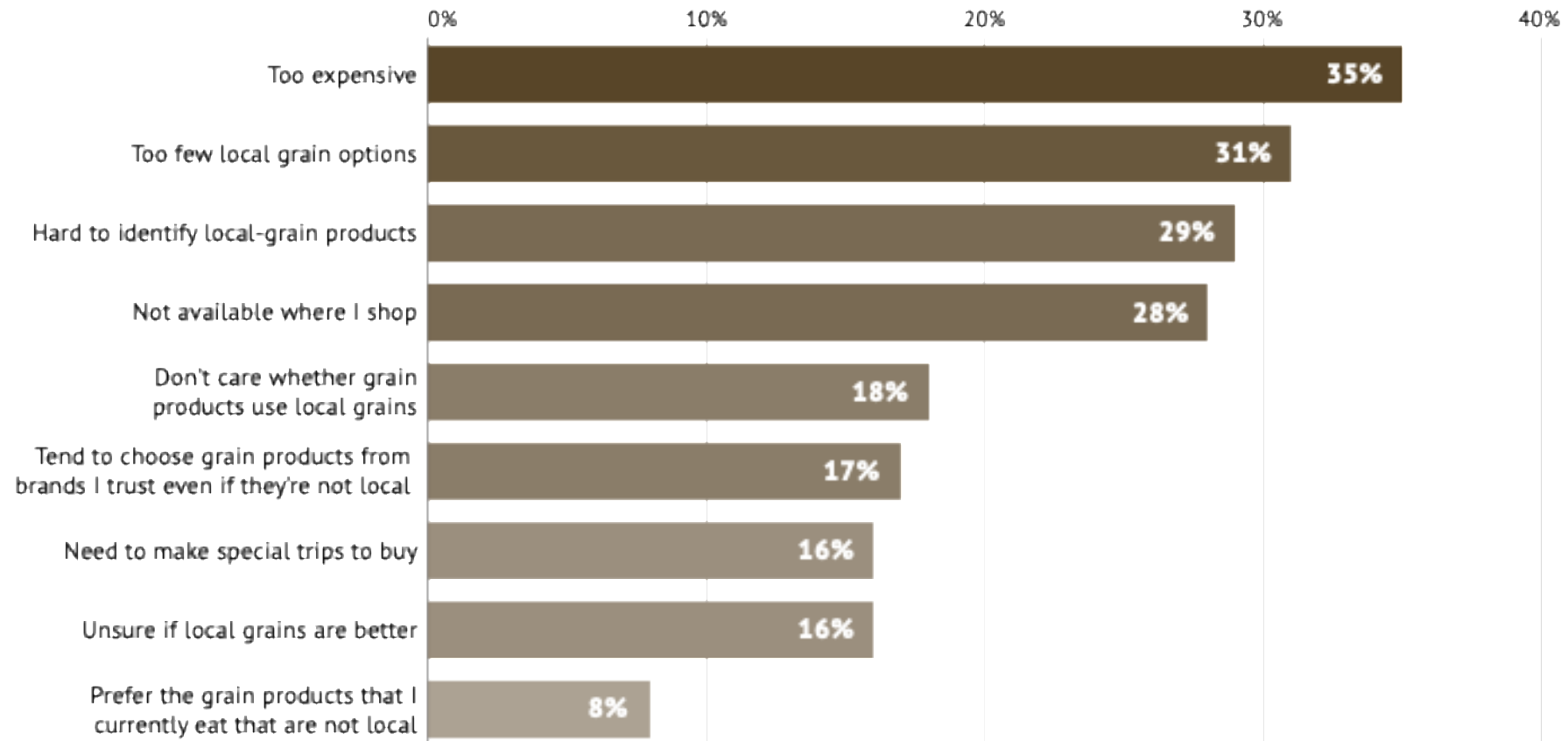
Consumer agreement with the statement: “I care where the grain in my grain products is grown and that it is local.”



The largest barrier to purchasing more local grains is **cost**.

Lack of availability and difficulty identifying local grains were also reported as significant barriers.

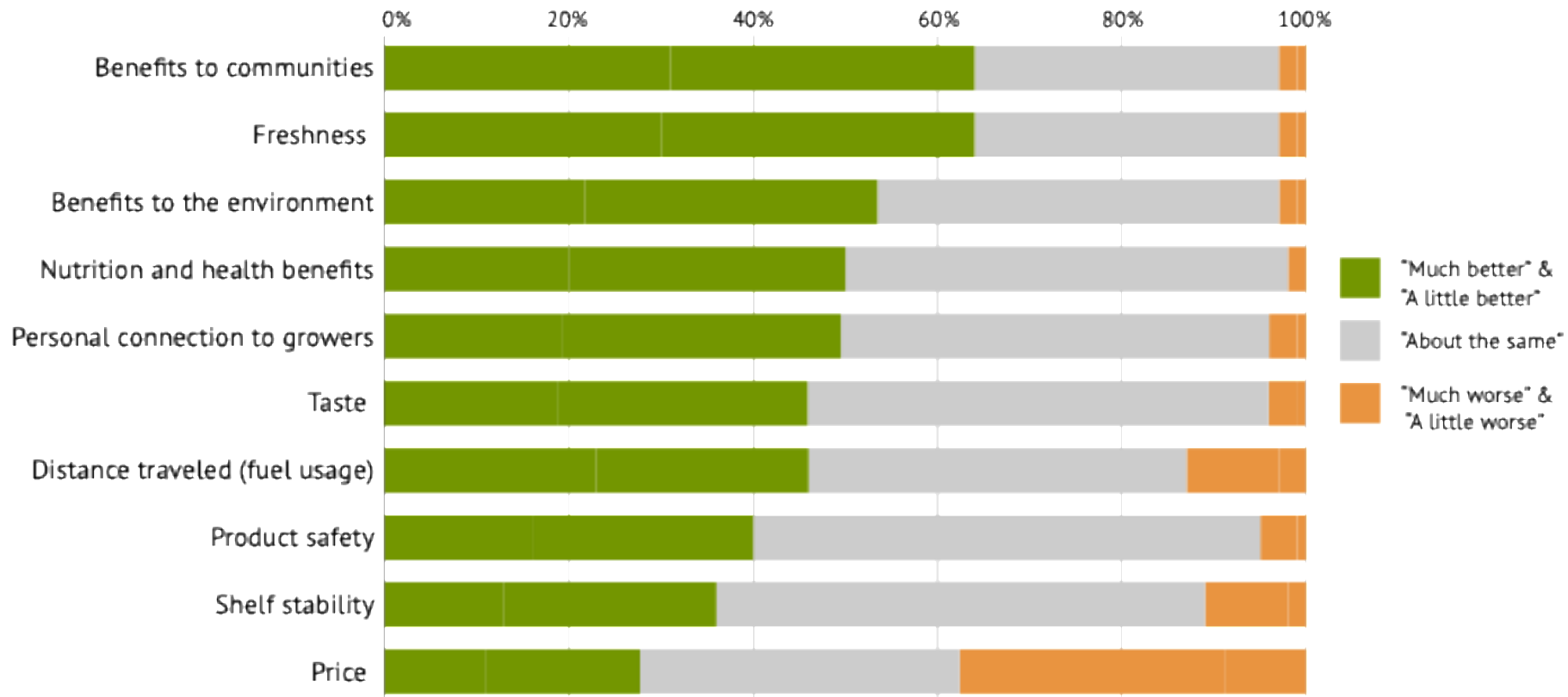
Barriers to purchasing foods made with local grains



Three out of five consumers believe local grains offer a better benefit to communities than non-local grains do.

Over 50% of consumers also consider local grain's freshness, benefits to the environment, and nutrition and health benefits to be superior to non-local grains.

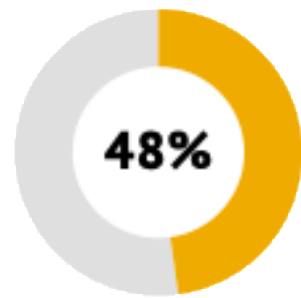
Ranking of attributes of local versus non-local grains



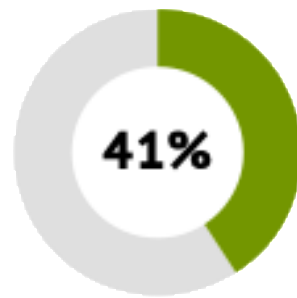
Nearly 50 percent of consumers would be motivated to buy more local grains if they had the opportunity to taste them.

Product packaging and signage would also motivate a similar number of consumers.

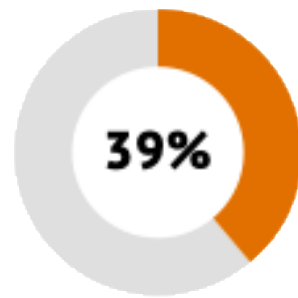
Consumer motivation to purchase more local grain products



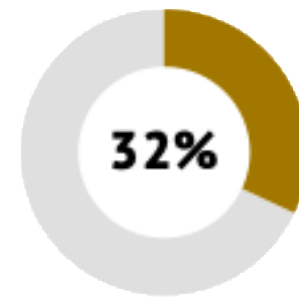
Opportunities to taste



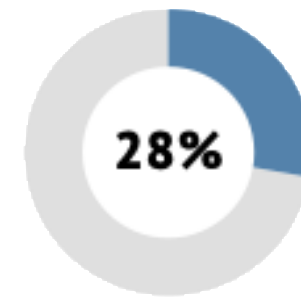
Packaging, labeling, and point-of-sale signage



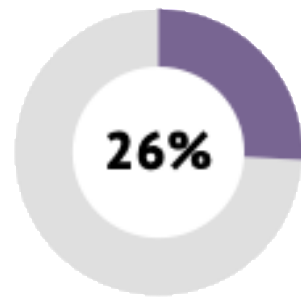
Info on true cost



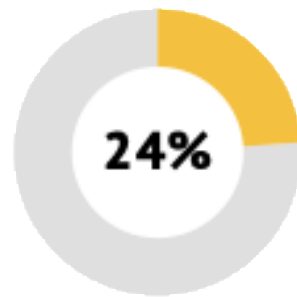
Info on how to keep products fresh



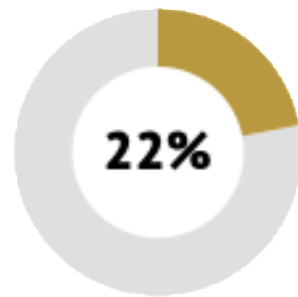
Info on product safety



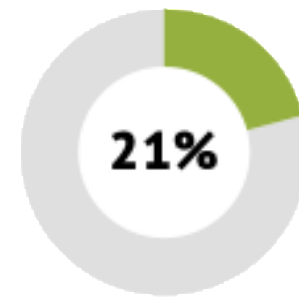
Info on community impact



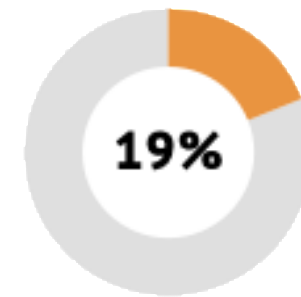
Info on the environmental benefits



Connecting with growers



Info on how far the grain has traveled

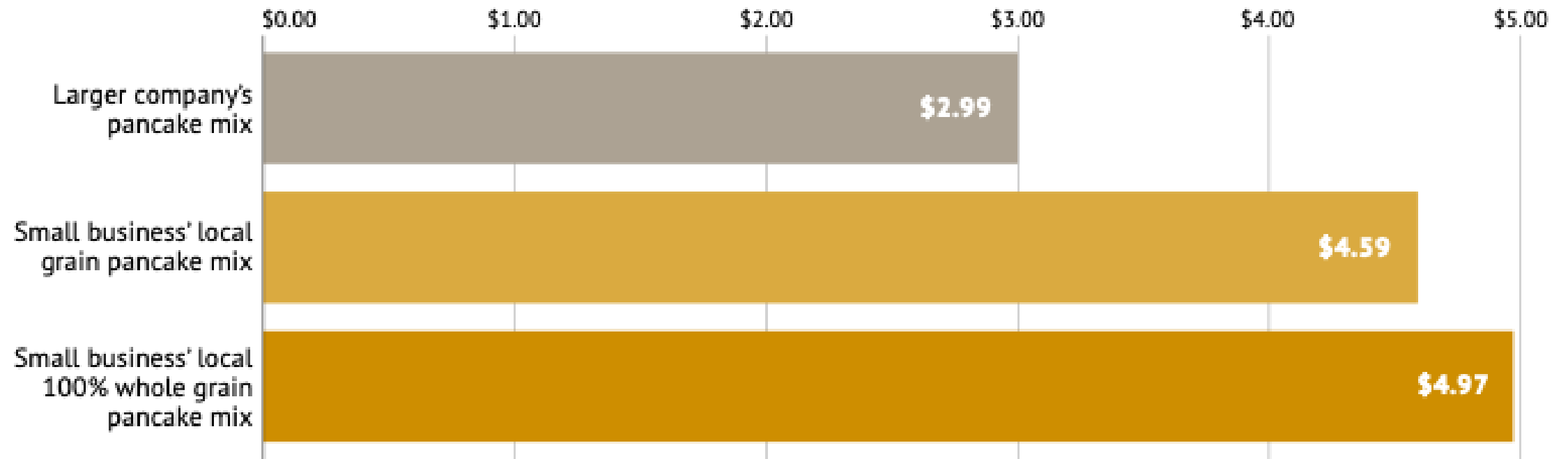


Stories behind grain product making

When asked to compare a **local grain pancake mix** from a small business to an identical commodity grain mix from a larger company costing \$2.99, consumers were willing to pay an average of **\$1.60 more** for the local grain mix.

Consumers further reported that they would pay a **\$1.98 premium** if the local grain mix was **100% whole grain** and the commodity mix was refined grain.

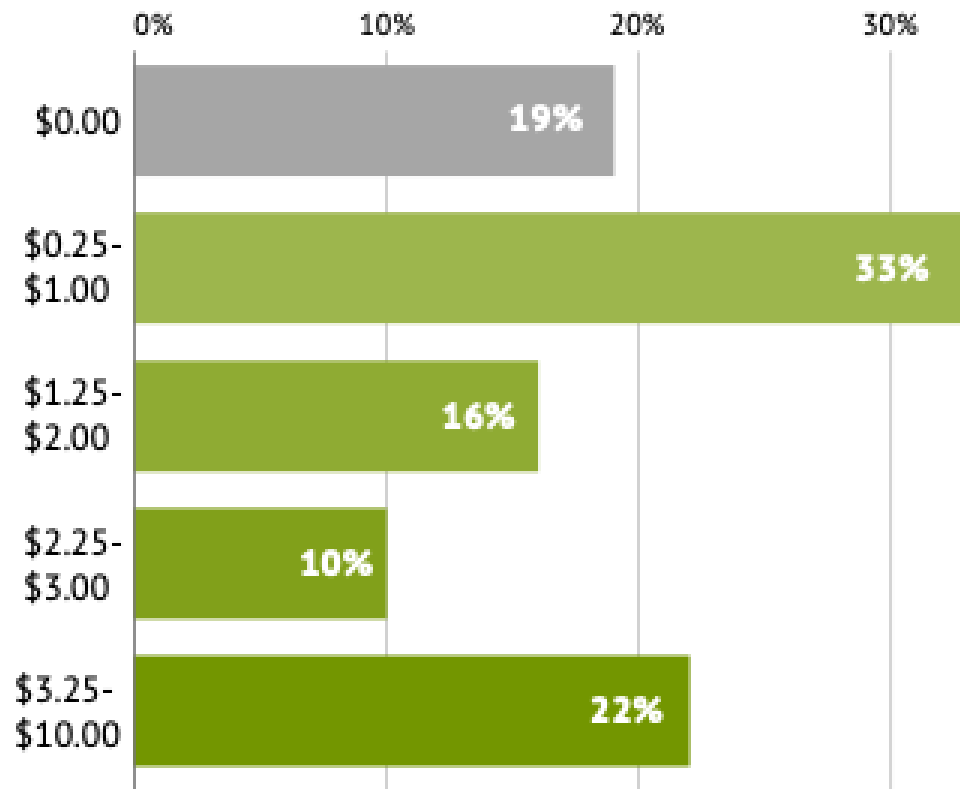
Consumer willingness to pay for local grain pancake mixes



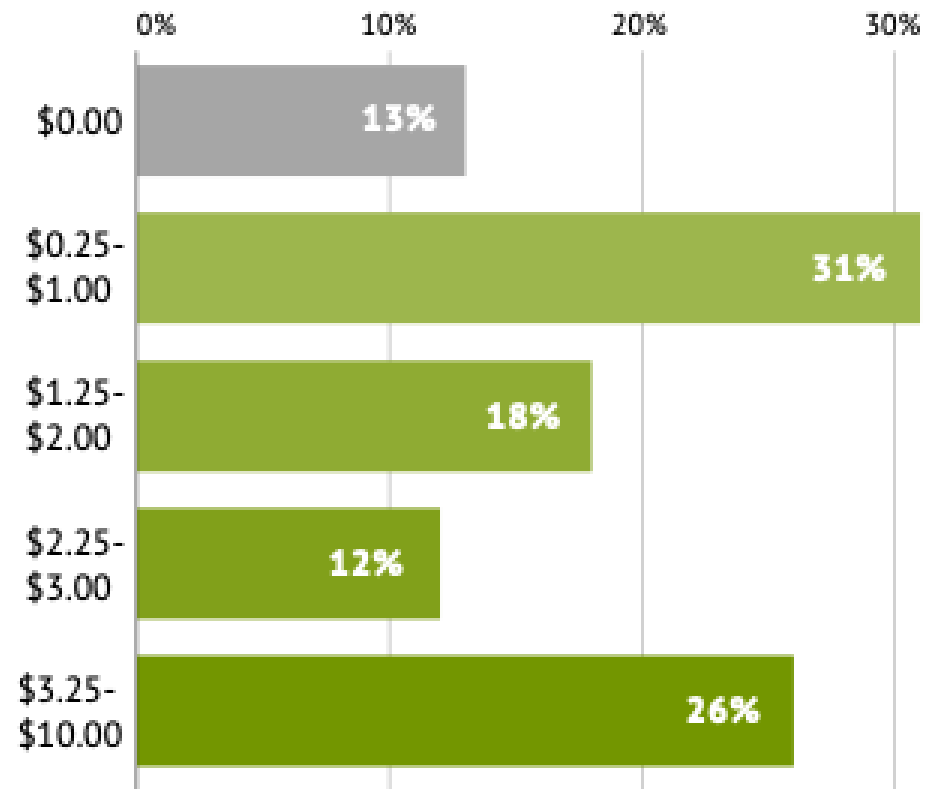
81% of consumers are willing to pay a premium for a local grain pancake mix. **87%** are willing to pay a premium if the local grain mix is also whole grain.

For both the local grain mix and the local whole grain mix, about one in four consumers is willing to pay a total of *at least* \$6.24.

Premiums consumers would pay for a pancake mix made with local grains

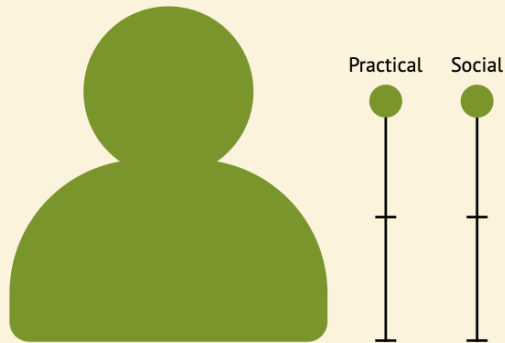


Premiums consumers would pay for a pancake mix made with local whole grains



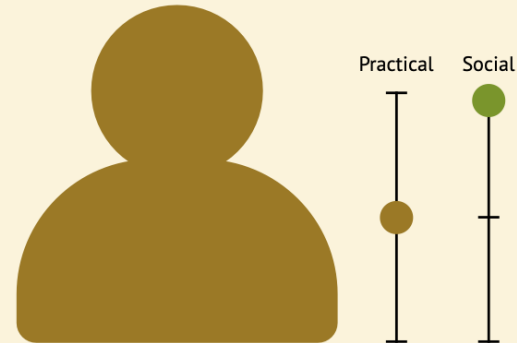
Consumer Segmentation Analysis

Local Grain Enthusiasts



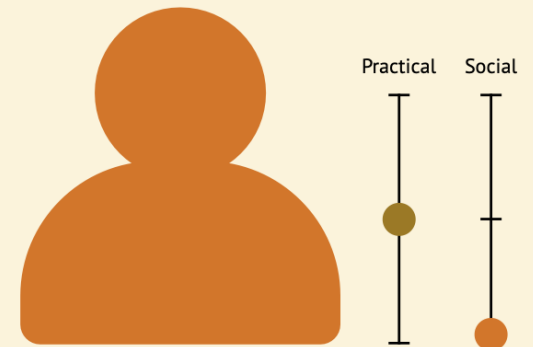
Value local grains for their practical, social, and environmental benefits

Local Grain Idealists



Value local grains for their social and environmental benefits, but are unconvinced of their practical benefits

Local Grain Value Skeptics



Skeptical of local grains' social and environmental benefits and neutral on their practical benefits



Conclusions



Summary of Key Survey Findings

- Consumers are eager to eat more whole grains, with flavor playing a central role in driving their choices
- The Whole Grain Stamp continues to stand out as a highly trusted tool, helping shoppers confidently identify whole grain foods
- Taste and health remain top motivators, even as cost and difficulty identifying whole grain products pose challenges
- Even among low-carb and gluten-free eaters, whole grains aren't off the table, indicating opportunities to reach these audiences
- Interest in sustainably grown and alternative grains is on the rise, signaling momentum for innovation across the grain supply chain
- A large number of consumers value locally grown grain products, reflecting increasing interest in regional food systems and community-based agriculture



Questions?

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