Whole Grain Consumption: Are We Making A Dent?

Make (at least!) half your grains whole
On our menu today…

- Background on data source
- The latest Whole Grain trends
- Food for thought
Food & Beverage Group Information Scope

Food and/or Beverage Acquisition
(Purchase/Grow/Hunt/Obtain)

Consumer Inventory
(Pantry/Refrigerator/Freezer)

Preparation

Consumption

Where FBS Plays

The Consumer
Attitudes
Characteristics
Related Behavior
Nutrient Intake Database

NET’s In & Away from Home Consumption Database

NET’s Mapping & Linking Programs

USDA’s information on Nutrient Composition & Serving Sizes

Nutrient Intake Database:
- Calories
- Nutrient Intake
- Servings
- Healthy Eating Index
- Food Guide Pyramid
Are we eating more whole grains?

Average Daily Pyramid Servings of Whole Grains (ozs.)

Pt. Chg. '08 v '98

+20.0%

Source: The NPD Group/Nutrient Intake Database
Years Ending February
And most people eat Whole Grains!

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

Source: The NPD Group/Nutrient Intake Database
Years Ending February
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

Source: The NPD Group/Nutrient Intake Database
Years Ending February
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%

Source: The NPD Group/Nutrient Intake Database
Years Ending February
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.”

- Whole Grains: 65.4%
- Fiber: 60.3%
- Calcium: 54.7%
- Vitamin C: 54.1%
- Protein: 53.3%
- Anti-Oxidents: 52.0%
- Omega 3: 46.3%
- Vitamin Enriched Products: 42.2%
- Iron: 42.0%
- Vitamin A: 38.4%

Source: The NPD Group Dieting Monitor
April 15, 2009 Wave
However....
We still have a ways to go!

The Goal: 50%

Today: 11%

% of Grains That Are Whole

Source: The NPD Group/Nutrient Intake Database
Years Ending February
All age groups have a ways to go!

Source: The NPD Group/Nutrient Intake Database
Years Ending February
Thoughts for the future!
### 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

Source: The NPD Group/Nutrient Intake Database
2 Years Ending February 2008
#1…Fill in the Gaps

 Ranked Based on Average Daily Intake

<table>
<thead>
<tr>
<th>Top Sources of Grains</th>
<th>Top Sources of Whole Grains</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Sandwiches</td>
<td>1. RTE Cereal</td>
</tr>
<tr>
<td>2. Bread</td>
<td>2. Hot Cereal</td>
</tr>
<tr>
<td>3. RTE Cereal</td>
<td>3. Total Salty Snacks</td>
</tr>
<tr>
<td>4. Pizza</td>
<td>4. Bread</td>
</tr>
<tr>
<td>5. Italian Dishes</td>
<td>5. Total Bars</td>
</tr>
</tbody>
</table>

Source: The NPD Group/Nutrient Intake Database
2 Years Ending February 2008

Proprietary and Confidential
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)

<table>
<thead>
<tr>
<th>Type</th>
<th>Gap (Average Daily Intake)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandwiches</td>
<td>1.46</td>
</tr>
<tr>
<td>Bread</td>
<td>0.46</td>
</tr>
<tr>
<td>Pizza</td>
<td>0.40</td>
</tr>
<tr>
<td>Italian Dishes</td>
<td>0.40</td>
</tr>
<tr>
<td>RTE Cereal</td>
<td>0.23</td>
</tr>
<tr>
<td>Pancakes/Waffles/FT</td>
<td>0.19</td>
</tr>
<tr>
<td>Mexican Dishes</td>
<td>0.13</td>
</tr>
<tr>
<td>Frz Dinner/Entrée</td>
<td>0.13</td>
</tr>
<tr>
<td>Rice</td>
<td>0.12</td>
</tr>
<tr>
<td>Cookies</td>
<td>0.12</td>
</tr>
<tr>
<td>Salty Snacks</td>
<td>0.12</td>
</tr>
<tr>
<td>Mac &amp; Cheese</td>
<td>0.12</td>
</tr>
<tr>
<td>Soup</td>
<td>0.11</td>
</tr>
<tr>
<td>Buns/Rolls</td>
<td>0.11</td>
</tr>
<tr>
<td>Cakes</td>
<td>0.10</td>
</tr>
</tbody>
</table>

Source: The NPD Group/Nutrient Intake Database
2 Years Ending February 2008
The benefit, helping extend throughout the day!

% of Whole Grain Eating's by Meal Occasion

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Breakfast</th>
<th>Lunch</th>
<th>Dinner</th>
<th>Snack</th>
</tr>
</thead>
<tbody>
<tr>
<td>2+YO</td>
<td>57%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-17 YO</td>
<td>53%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-34 YO</td>
<td>54%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>35-54 YO</td>
<td>55%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+YO</td>
<td>64%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The NPD Group/Nutrient Intake Database
Years Ending February
#2…Leverage the biggest demographic change!

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

Source: The NPD Group/National Eating Trends Database
2 Years Ending February 2008
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