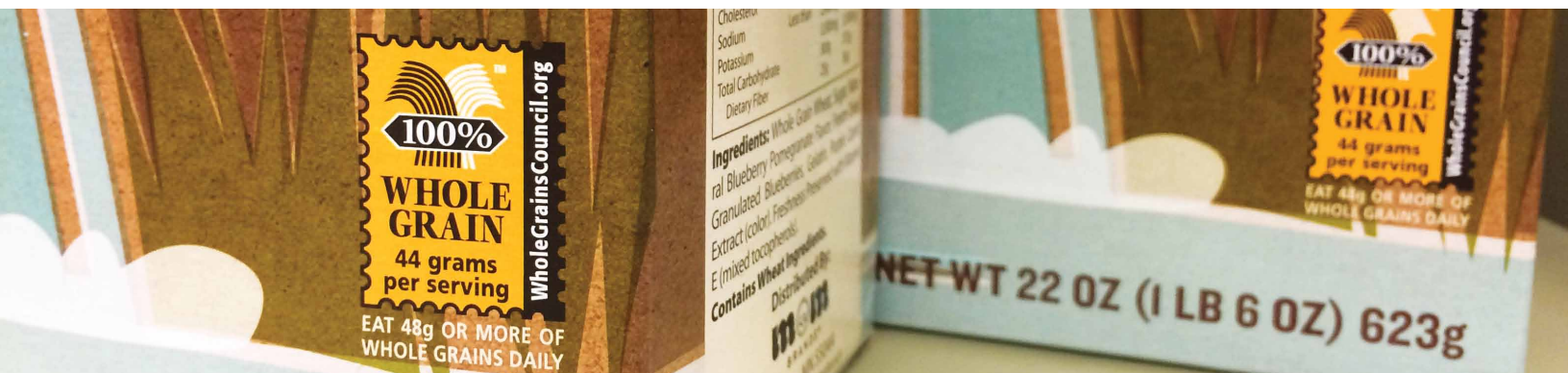


# SPINS TRENDWATCH

## WHOLE GRAINS

“The sun comes shining as I was strolling | The wheat fields waving and the dust clouds rolling | ...This land was made for you and me.” – *Woodie Guthrie*

Governments around the world are increasingly recommending that people eat three or more servings of whole grains per day. However, grain labels often lack clear guidance on whole grain content and at times can even be misleading, leaving consumers wondering, how much is enough? Which foods pack the biggest whole grain punch? Are there whole grain options for those who prefer to avoid gluten? The Whole Grains Council is helping bring clarity to these questions, make it easier for consumers to recognize the nutritious options available to them and make small changes to their diets that can lead to big wellness benefits.



### The whole seed and nothing but.

Many grains are milled for refinement, removing the bran and germ of each kernel to make the grains more shelf stable, but leaving them stripped of vital nutrients. Whole grains on the other hand, contain all the essential parts and naturally-occurring nutrients of the entire grain seed in their original proportions. Why choose whole?

#### Diversity is a good thing.

Few foods offer the wide range of health benefits that whole grains do, including reduced risk of heart disease, stroke, cancer, diabetes and obesity.

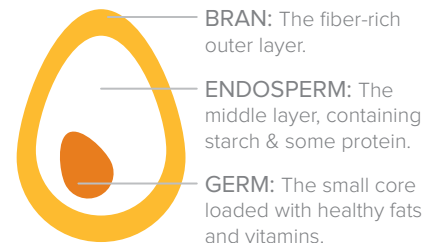
#### Fight free radicals.

Fruits and veggies are a great source for antioxidants, but whole grains are often even better, and have varieties not found in other foods!

#### Up your nutritional intake!

Don't sacrifice the goodness of grains: Without the bran and germ, about 25% of a grain's protein is lost, along with at least 17 key nutrients.

Whole Grains contain 100% of all three parts of the original kernel.



### Think beyond wheat: Grains, A-Z

With such a variety of grains available, many with tremendous nutritional benefits, unique flavors and growing culinary appeal, why stick to just wheat? When consumed in a form including the bran, germ and endosperm, all of these grains are generally accepted whole grain foods and flours:

**AMARANTH**  
BARLEY  
BUCKWHEAT  
CORN  
MILLET  
OATS  
QUINOA

**RICE**  
RYE  
SORGHUM  
TEFF  
TRITICALE  
WHEAT  
WILD RICE

**Gluten Conscious?**  
All the whole grains in bold are naturally gluten free!\*

Check out the Whole Grain Council's website to learn more about these grains

#### ----- Whole Grains, NOT to be confused with: -----

##### MULTI-GRAIN

The term multi-grain simply means that a product is made with more than one grain and gives no indication as to whether the grains are whole or not.

##### WHOLE WHEAT

Whole wheat is one kind of a whole grain (much like a carrot is one type of veggie), so while all whole wheat is whole grain, not all whole grain is whole wheat.

##### REFINED GRAINS

A refined grain is what remains after two of the most nutritious parts of the grain are removed (the bran and the germ) which gives the grain a longer shelf life.

##### ENRICHED GRAINS

Refining grains removes half to two-thirds of a few dozen nutrients; enrichment adds back only about five nutrients, in different proportions than originally.

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## WHOLE GRAINS

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### Making the move to *Whole* has never been easier.

With its eye-catching Whole Grains Stamp, the Whole Grains Council makes it easy to quickly spot products that are guaranteed to have at least half a serving of whole grains. The non profit organization is encouraging consumers to eat Whole Grains on Every Plate not only by helping them to find whole grain products in store, but also by educating them on the importance of going whole and sharing tips on how best to cook and enjoy their grains.

#### HOW MUCH IS ENOUGH?

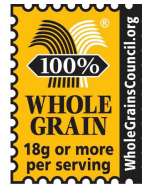
Eating three products labeled "100% Whole Grain" does the trick – or six products bearing ANY Whole Grain Stamp.\* Each Stamp also tells you how many grams of whole grains are in a serving of the product, helping you keep track of your intake!

For those who want to go all in and ensure all their grains are whole, it's as easy as choosing products that feature the 100% Whole Grain Stamp.



#### BASIC STAMP

A product contains at least 8g (a half serving\*) of whole grain, but may also include some refined grains, such as extra bran, germ or refined flour.



#### 100% STAMP

A product contains at least 16g (a full serving\*) of whole grain per serving, and ALL of the product's grain ingredients are whole grain.

\*48g+ of whole grains are recommended daily under US Dietary Guidelines.

#### THE WHOLE GRAIN STAMP IS WORKING!

The Stamp has become a tool to increase awareness of whole grains and is now featured on thousands of products:



### Gaining momentum across categories.

Whole Grain stamped products now span 23 SPINS categories, with the top five sales category leaders driving \$7.7B in dollar volume in addition to an increasing share of total category dollars.

Another category to look out for? **Packaged Grains, particularly those that are 'ancient!'** Sales of Whole Grain stamped packaged ancient grains grew **20%** over the past year.

#### Leading Whole Grain Stamped Categories are Gaining Share of Total Category Dollar Sales!

Leading Stamped Categories (by dollar sales)	% Dollar Share of Total Category
<b>COLD CEREALS</b>	<b>45%</b>
<b>BREAD &amp; BAKED GOODS</b>	<b>7%</b>
<b>COOKIES AND SNACK BARS</b>	<b>7%</b>
<b>CRACKERS &amp; CRISPBREADS</b>	<b>8%</b>
<b>HOT CEREALS</b>	<b>29%</b>

Yogurt & Kefir is the newest category to have products 'Stamped!'

### The Whole Grain Stamp pairs well on product packaging.

It's no secret that consumers want transparency and are turning to label claims and third party certifications to better understand what's in their food. What's more, many are not stopping at seeking out one label to ensure quality. Sales of Whole Grain stamped products that are also natural, organic, Non-GMO Project Verified and labeled gluten free are on the rise.

#### WHOLE GRAIN STAMPED + ORGANIC

More than **half a billion dollars** in sales are generated annually by products that are 70% organic in addition to being Whole Grain stamped.

**+17%**

#### WHOLE GRAIN STAMPED + NON-GMO

Seven percent of the dollar sales (**\$637M**) that Whole Grain stamped products drive comes from those that are also Non GMO Project Verified.

**+10%**

#### WHOLE GRAIN STAMPED + NATURAL

Dollar sales of Whole Grain stamped products that are also defined as Natural by SPINS have reached **\$1.4B!**

**+6%**

#### WHOLE GRAINS AND THE GLUTEN INTOLERANT

People with celiac disease or gluten intolerance can enjoy whole grains even though they're avoiding wheat, barley and rye. In fact, if your digestion is impaired, getting the health benefits of whole grains may be even more important.

Not only are there plenty of grains that are naturally gluten free, but many brands are now making it known which products are 'safe' for those who must avoid gluten - right on the label.

**+12%**

DOLLAR GROWTH  
WHOLE GRAIN STAMPED AND  
LABELED OR CERTIFIED GF