



Whole Grains on the Plate:

Consumer Priorities,
Perceptions, and Preferences

Highlighting Findings from the 2024
HealthFocus Global Trend Study

Delivering powerful insights to the leading global food, beverage, ingredient, and supplement companies.



Focused exclusively on health, nutrition, and well-being, from the consumer perspective.

Your one-stop shop for a full range of important health and wellness topics.



HealthFocus Global Trend Study Market Coverage

AMERICAS

NORTH AMERICA

USA
Canada

LATIN AMERICA

Mexico
Brazil

EUROPE

France
Germany
UK
Poland

MIDDLE EAST & AFRICA

Turkey
Saudi Arabia
Nigeria
Egypt

SOUTH ASIA

India
Pakistan

EAST ASIA PACIFIC

Australia
China
Hong Kong
Japan
Thailand
Vietnam
Indonesia
Philippines
Malaysia
Taiwan
South Korea



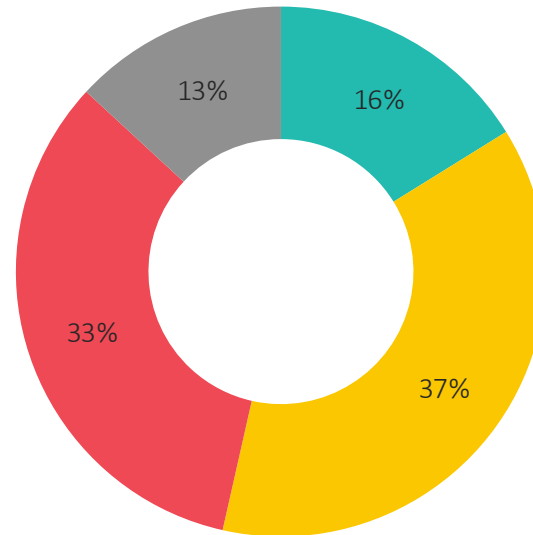


THE WHOLE GRAIN SITUATION

The Big Picture View of Carbs

Which of the following best describes your actions around carbohydrates?

- I avoid carbohydrates as much as possible
- I avoid processed carbohydrates (e.g., white breads, baked goods, etc.), but I don't limit carbs from whole foods (e.g., whole grains, vegetables, legumes, etc.)
- I use carbohydrates as part of an overall balanced diet and don't focus on the type of carbohydrate
- I don't think about carbohydrates in my diet

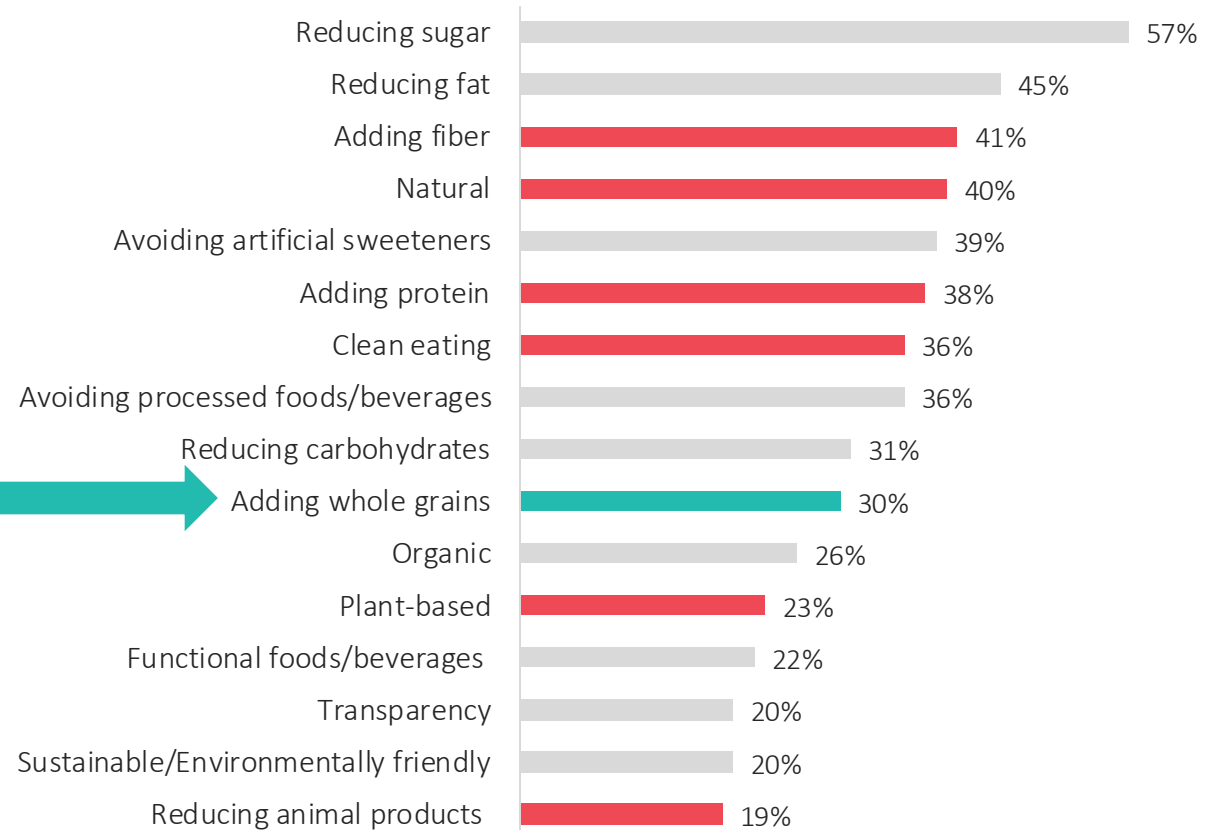


Seeking Whole Grains – and Their Benefits!



Where Whole Grains Fit in the Health and Wellness Trend Landscape

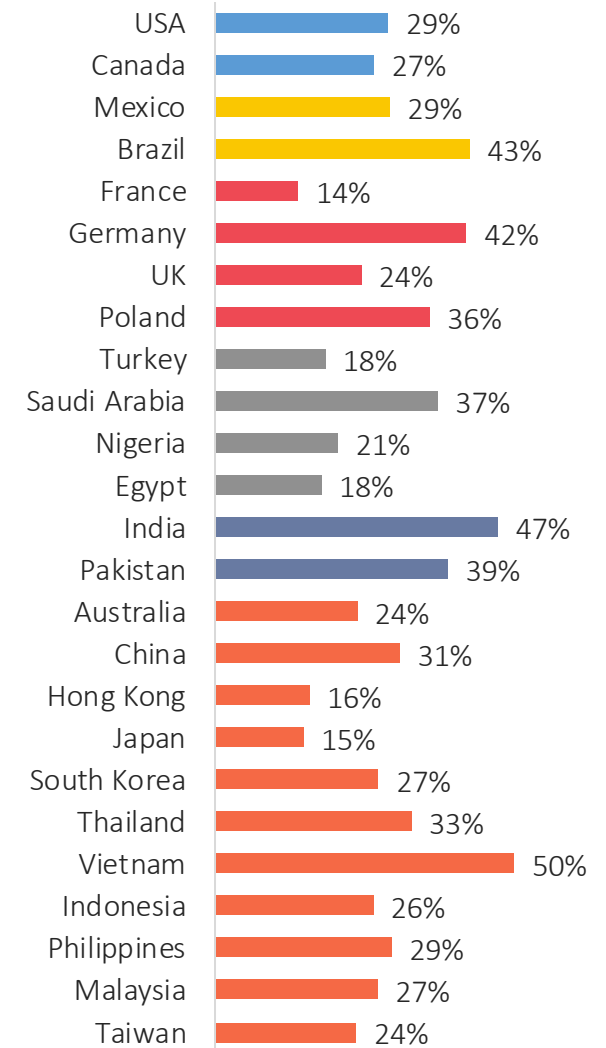
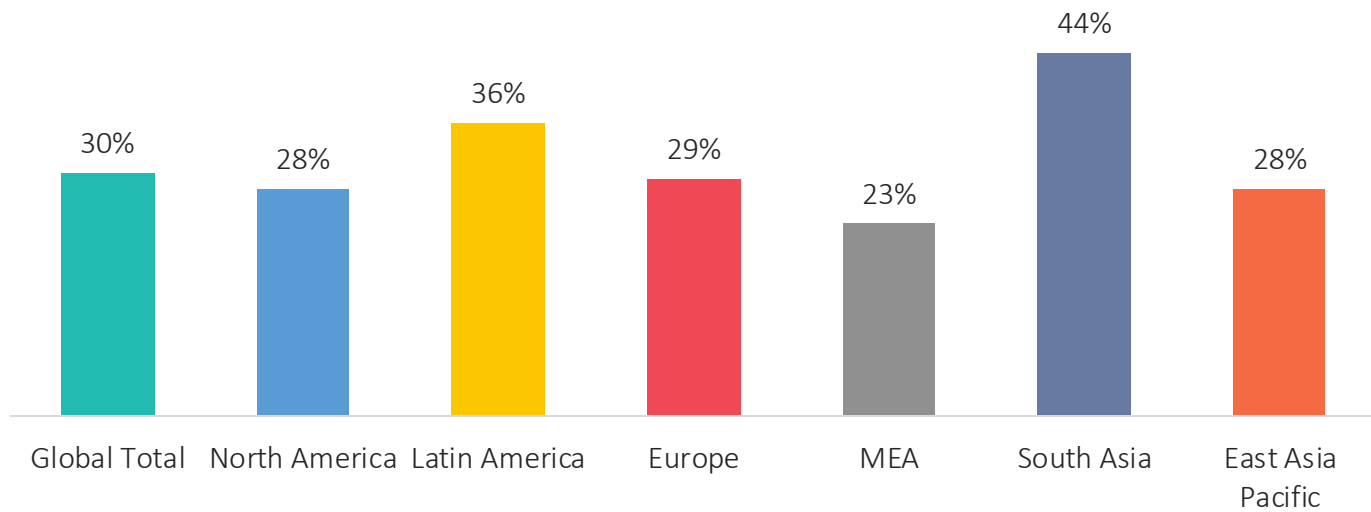
Which of the following have become more important in your diet over the last year?



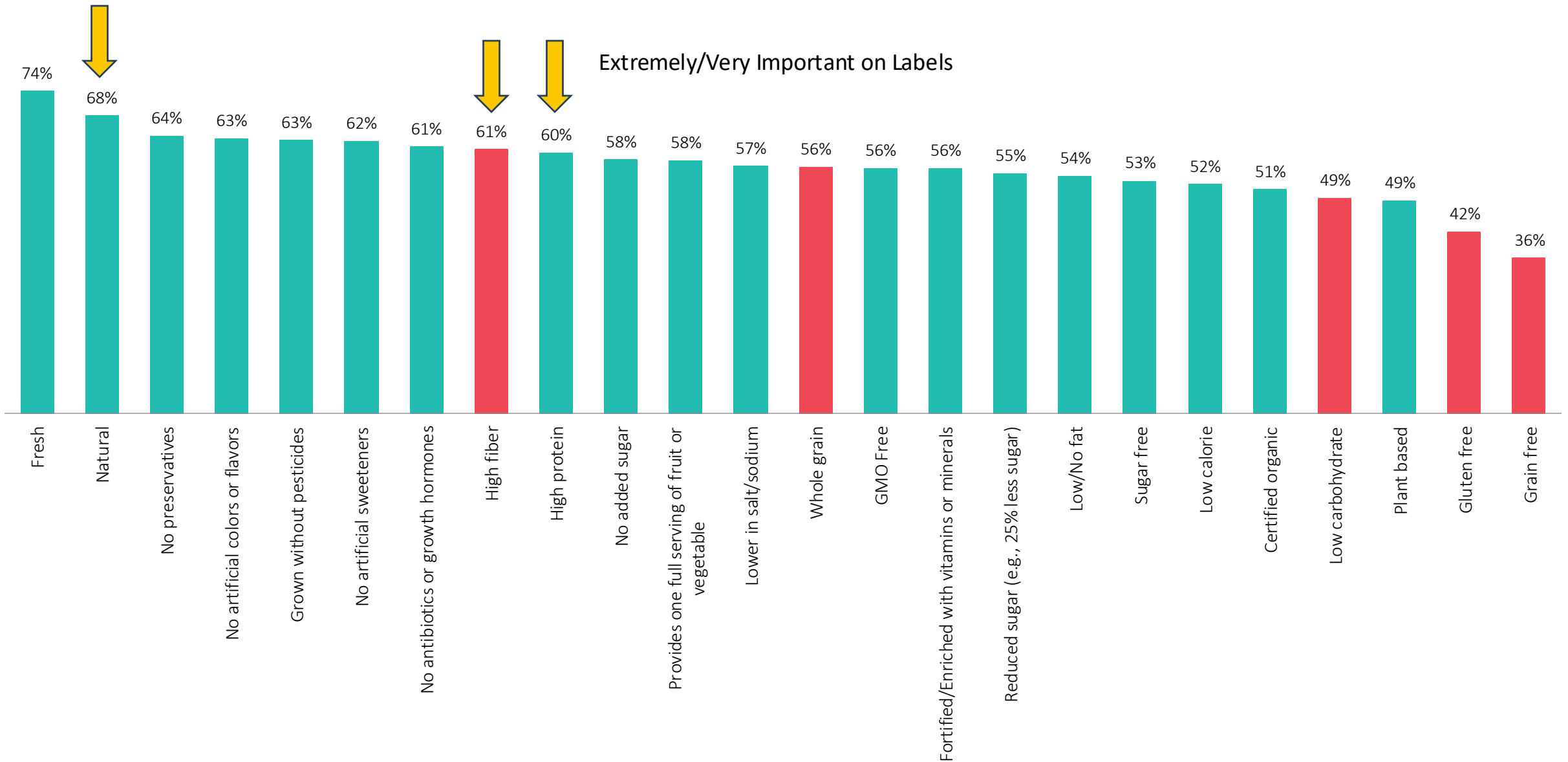
Who is Most Focused on Whole Grains?

Which of the following have become more important in your diet over the last year?

Adding whole grains



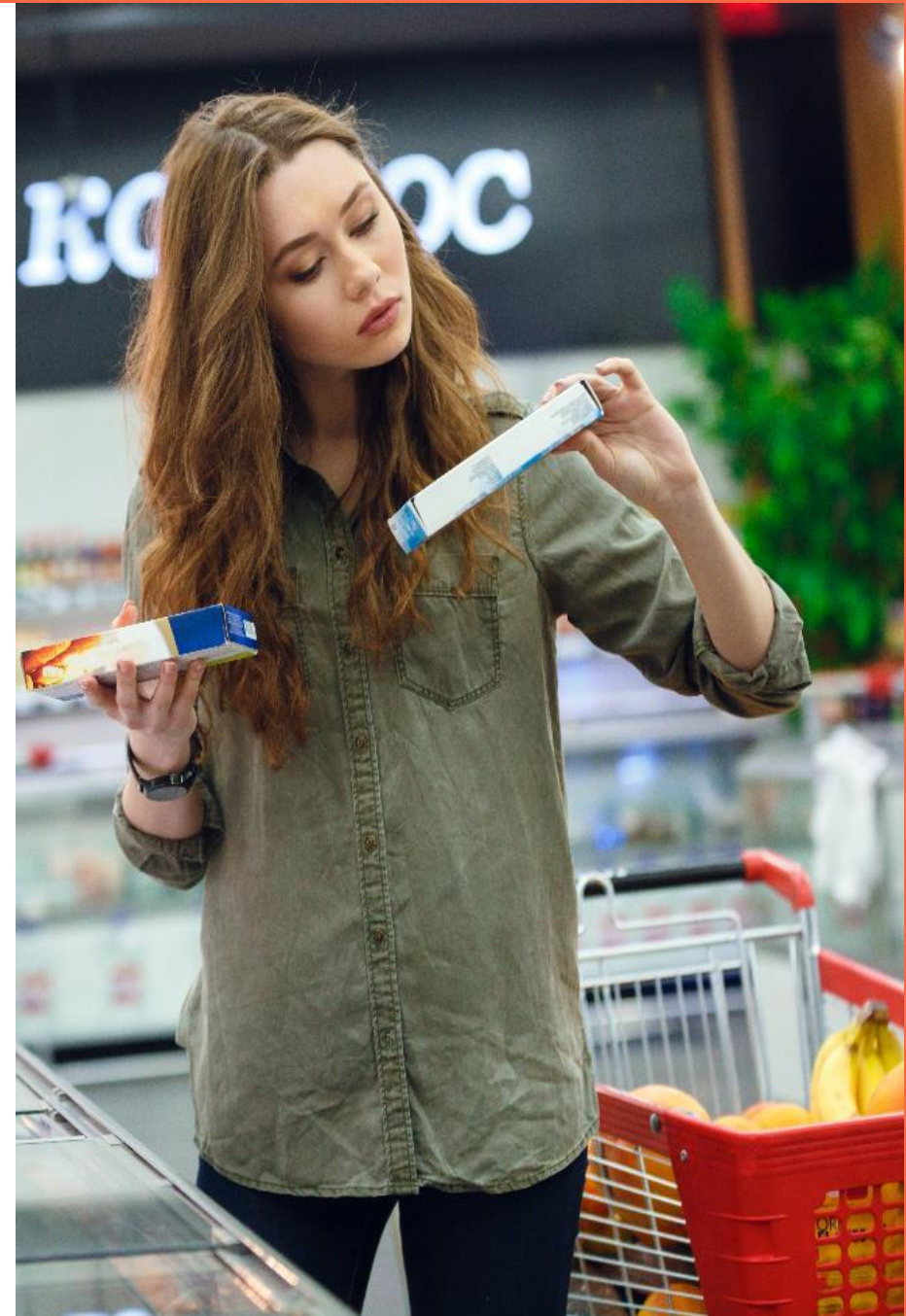
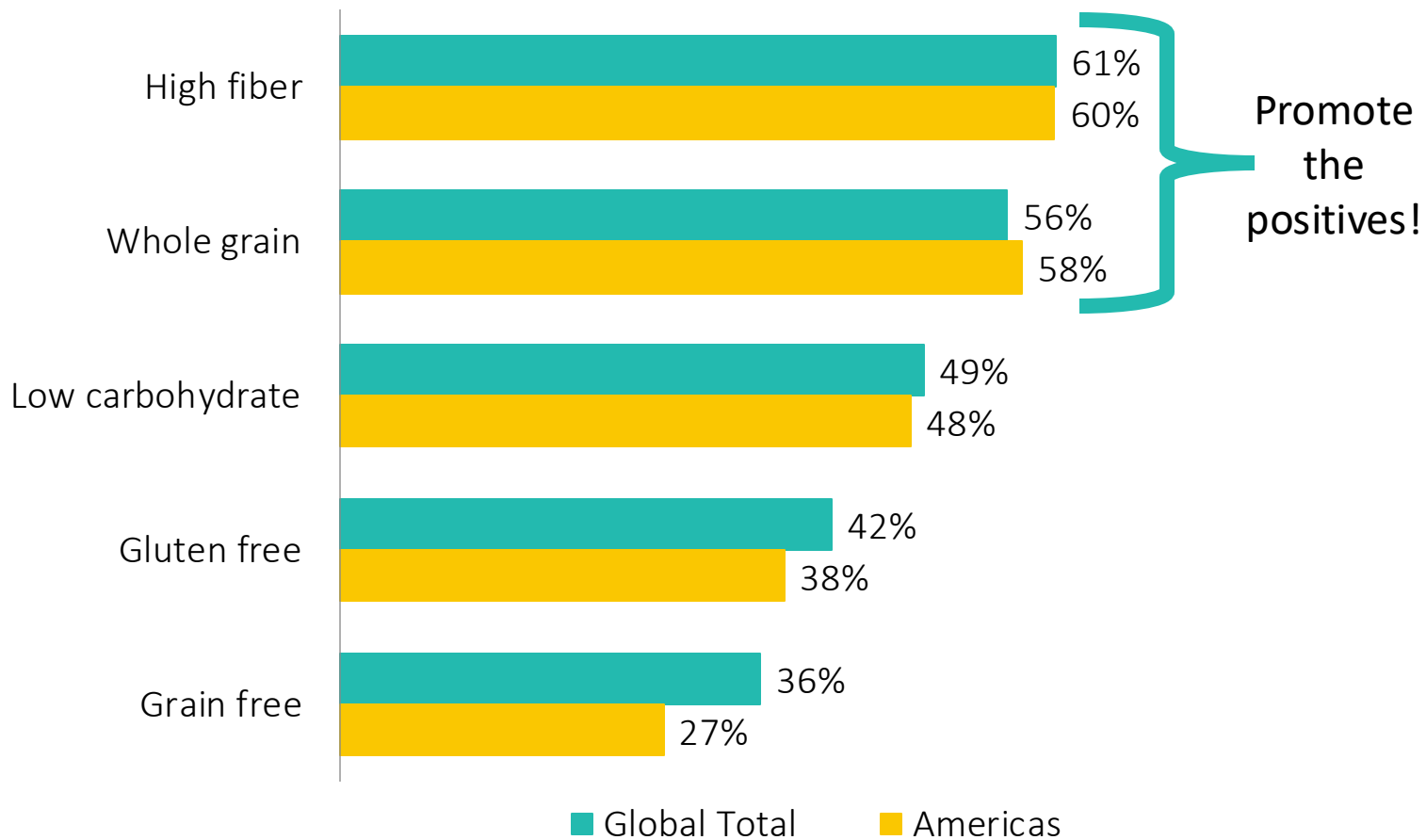
Whole Grain, a Claim Most Seek Globally



Consumers Look to Add Positives over Removing Negatives

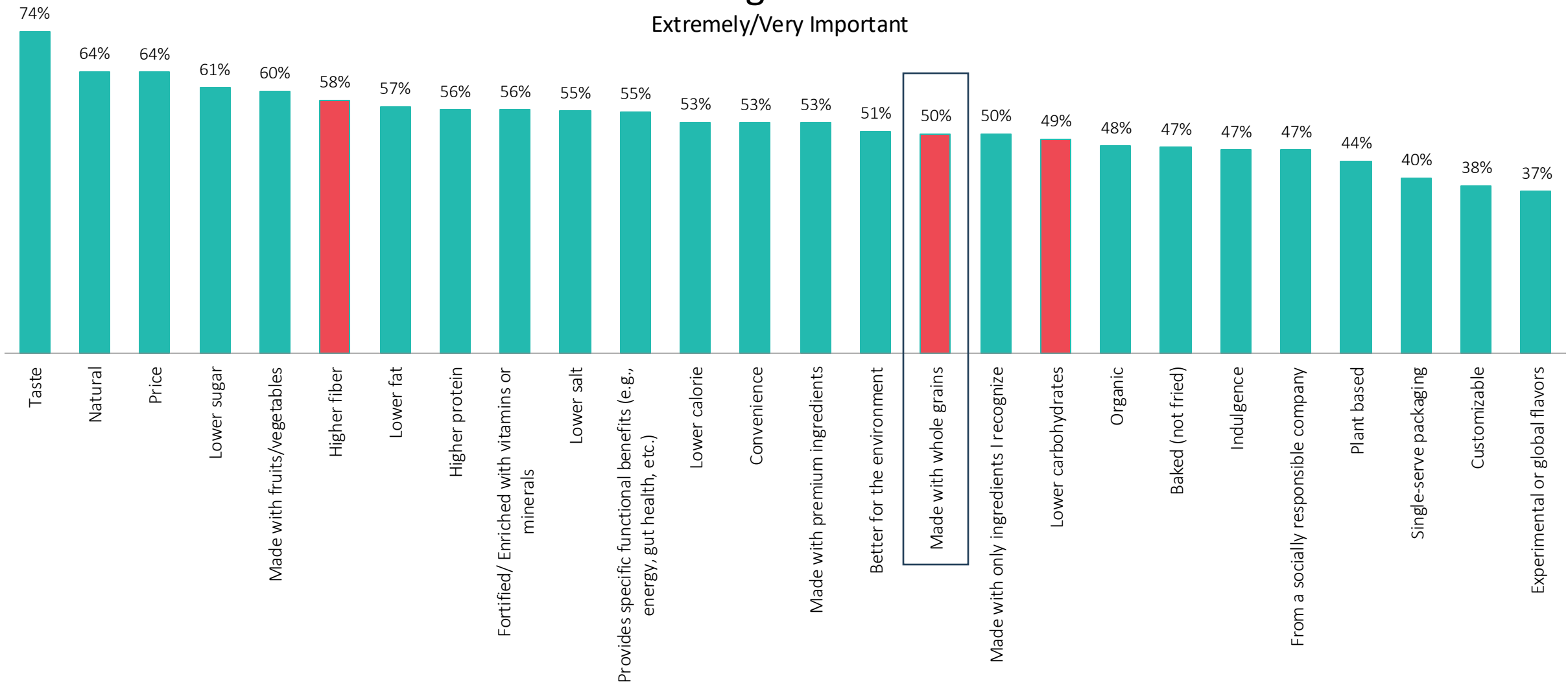
Importance of Statements on Labels

Extremely/Very Important



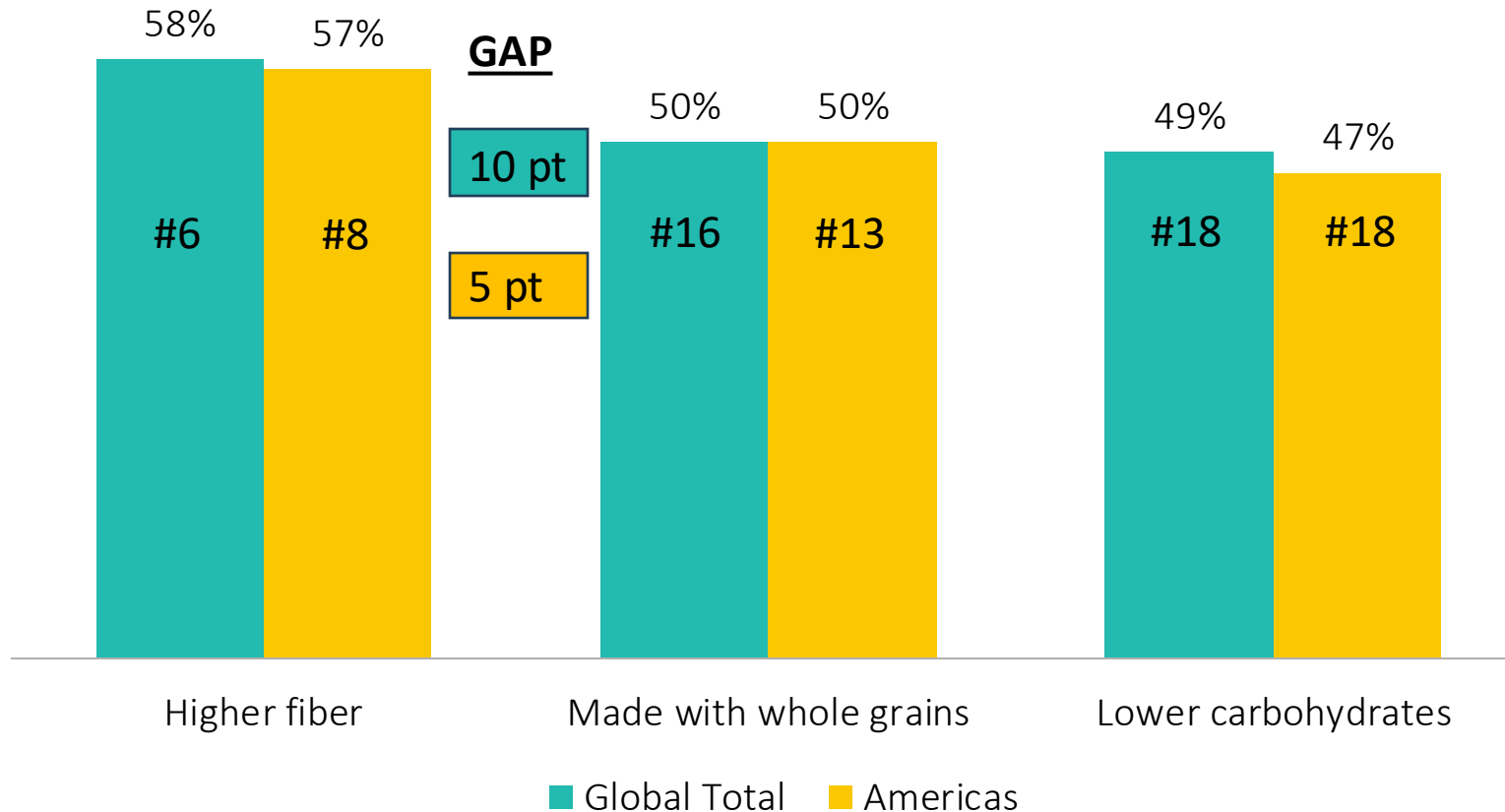
Taste Wins in Snacking Categories, but Health is a Factor

Snacking Attributes Extremely/Very Important



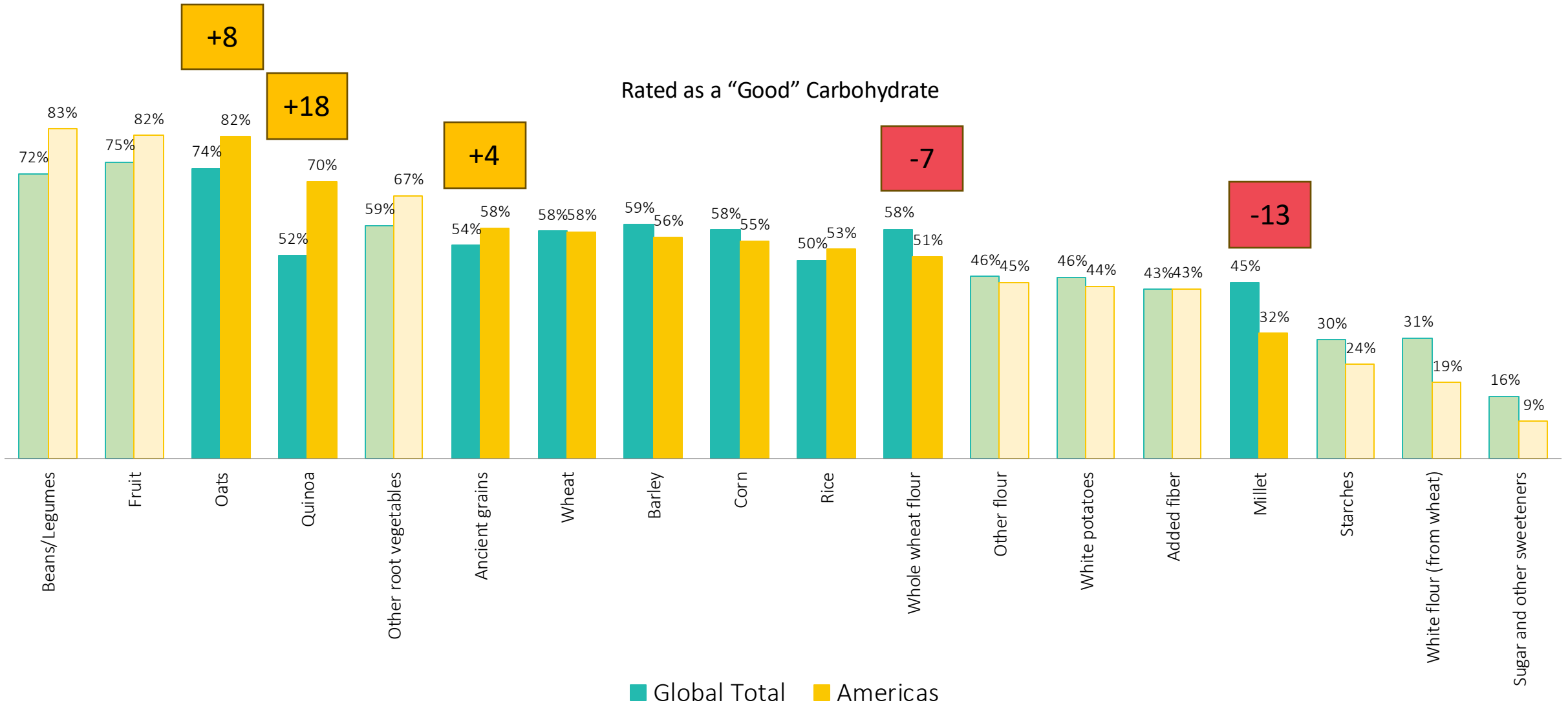
Half of Consumers Look for Whole Grains in Snacks

Importance When Choosing A Snack Extremely/Very Important



* # showing ranking among 26 attributes important when choosing a snack

Which Grains are Rated Most Positively?

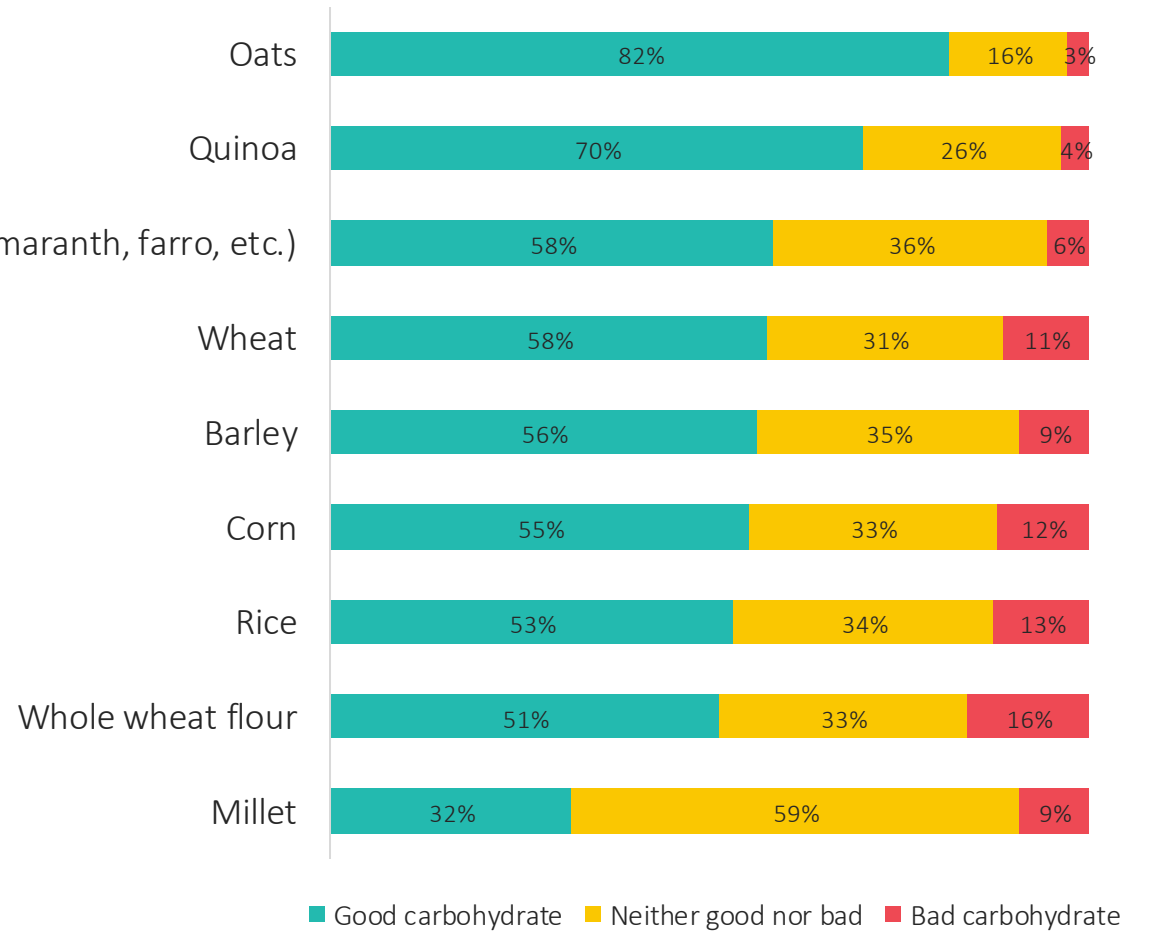


Whole Grains are Looking Good! 😊



Ancient grains (e.g., buckwheat, amaranth, farro, etc.)

Consumer Ratings of Carbohydrate Sources - Americas



I Want Fiber... But Give it to me Naturally

Consumer Ratings of Carbohydrate Sources -
Americas

Whole Grain "Good" Carbs

Oats	82%
Quinoa	70%
Ancient grains	58%
Wheat	58%
Barley	56%
Corn	55%
Rice	53%
Whole wheat flour	51%
Millet	32%

Added Fiber
"Good" Carb
43%





WHOLE GRAIN PRIORITIZER DEEP DIVE

Who Are Whole Grain Prioritizers?

*“Adding whole grains
has become more
important in my diet
over the last year”*

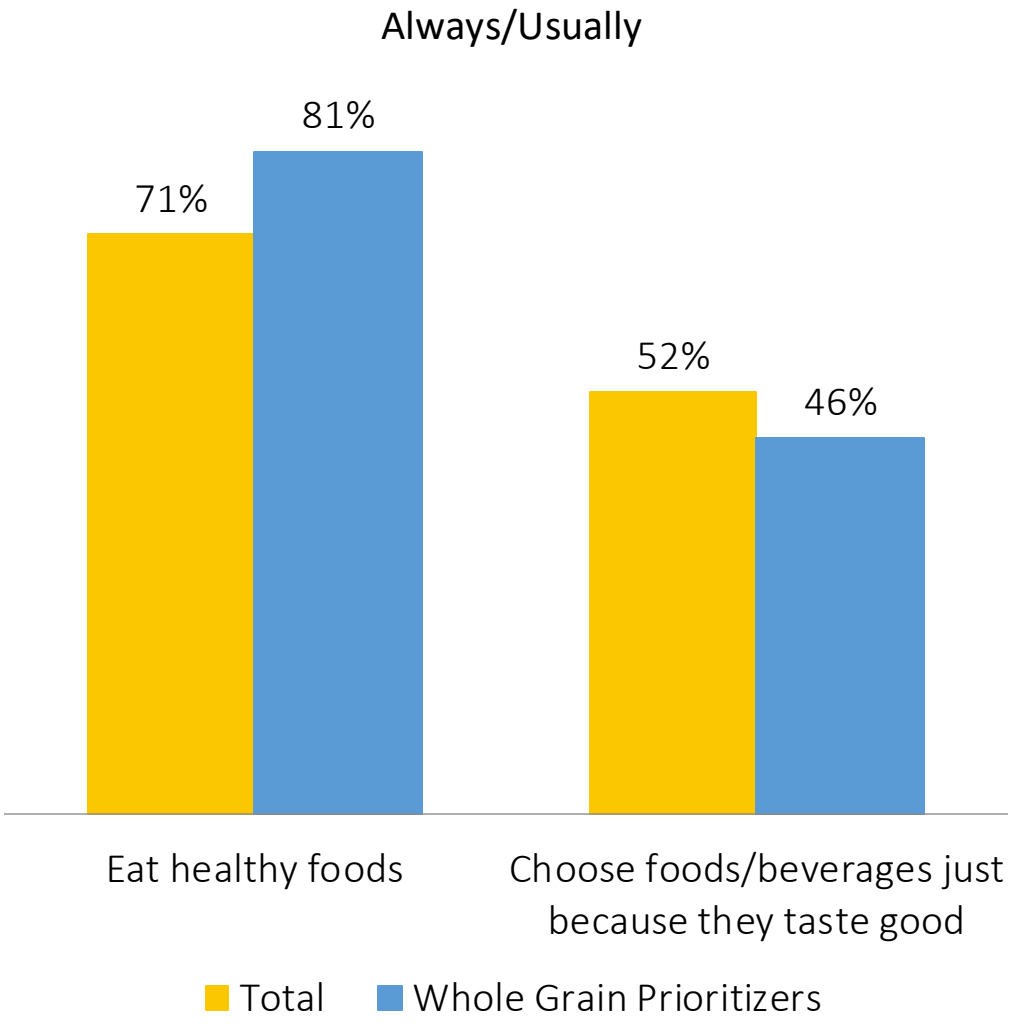
32% of American*
Consumers
(30% of Global)

Index Slightly
Older and
Female



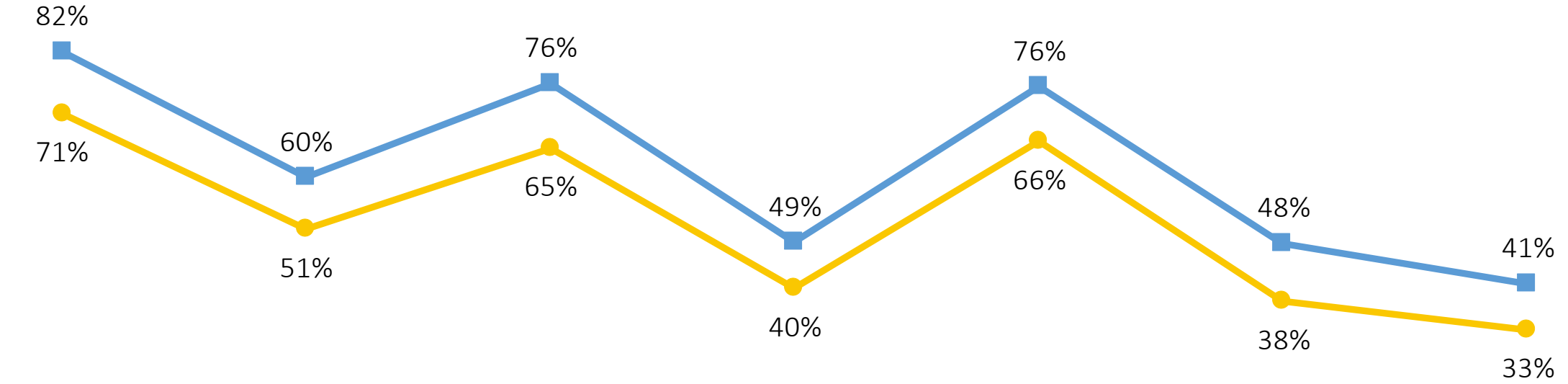
*Brazil, Canada, Mexico, US Combined

Healthy Foods Matter More, Taste Matters Less



Nutrition Triumphs at Every Eating Occasion

Importance of Nutrition Throughout the Day When Deciding What to Eat



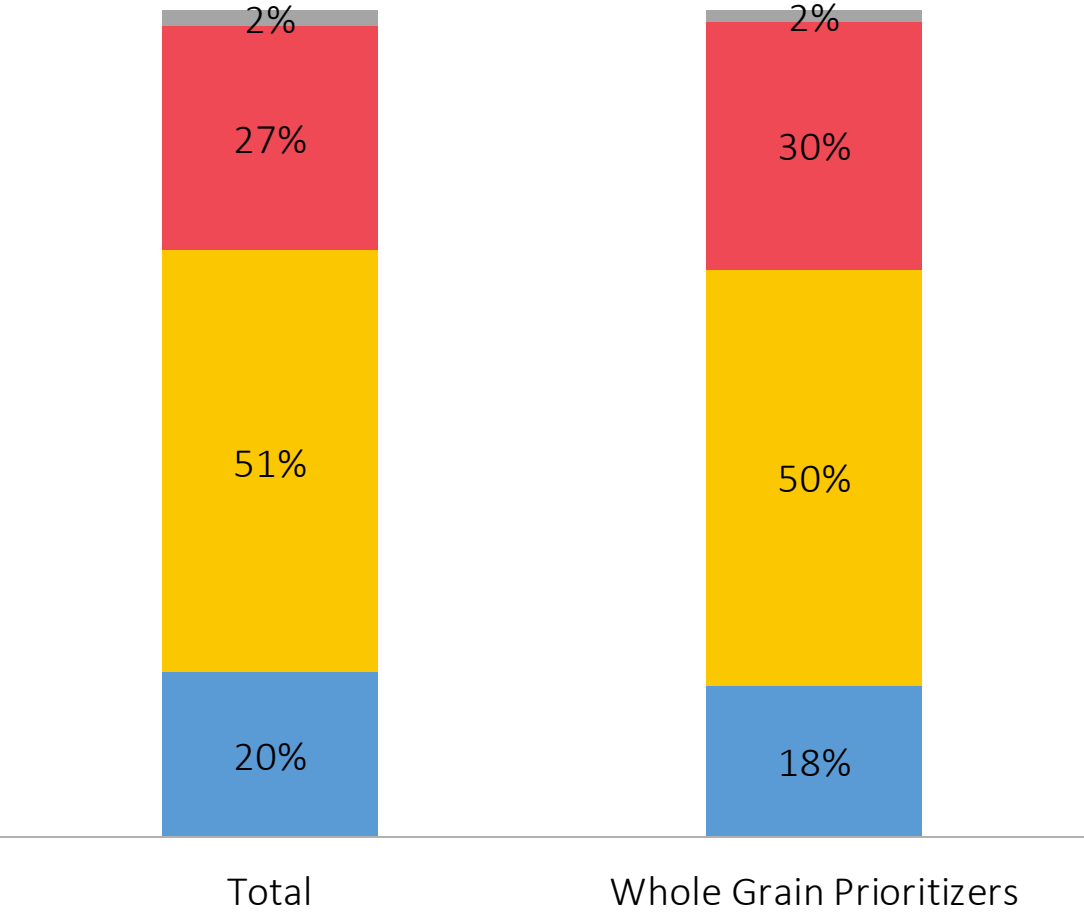
Breakfast Morning Snack Lunch Afternoon Snack Dinner Evening Snack Late Night Snack

● Total ■ Whole Grain Prioritizers

Whole Grain Prioritizers Seek Healthier Snacks

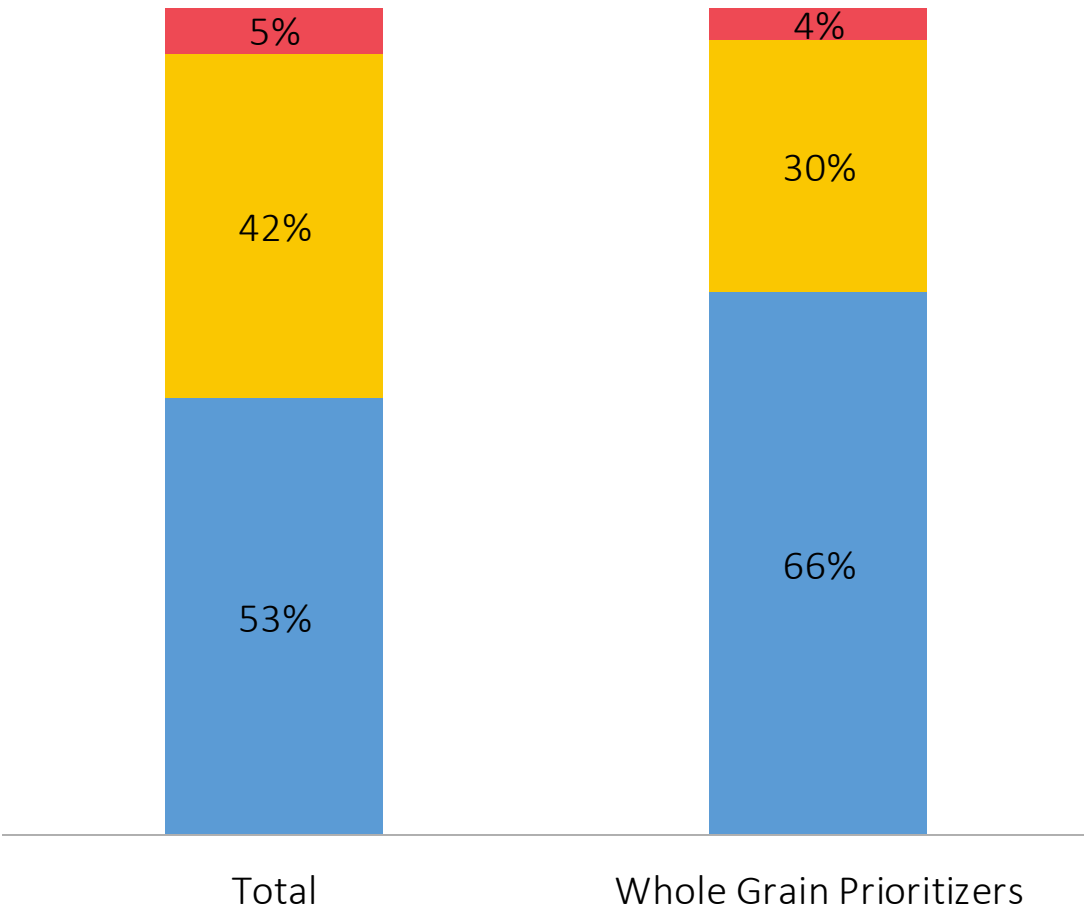
Snacking Frequency

Over the last two years



Snacking Healthiness

Over the last two years

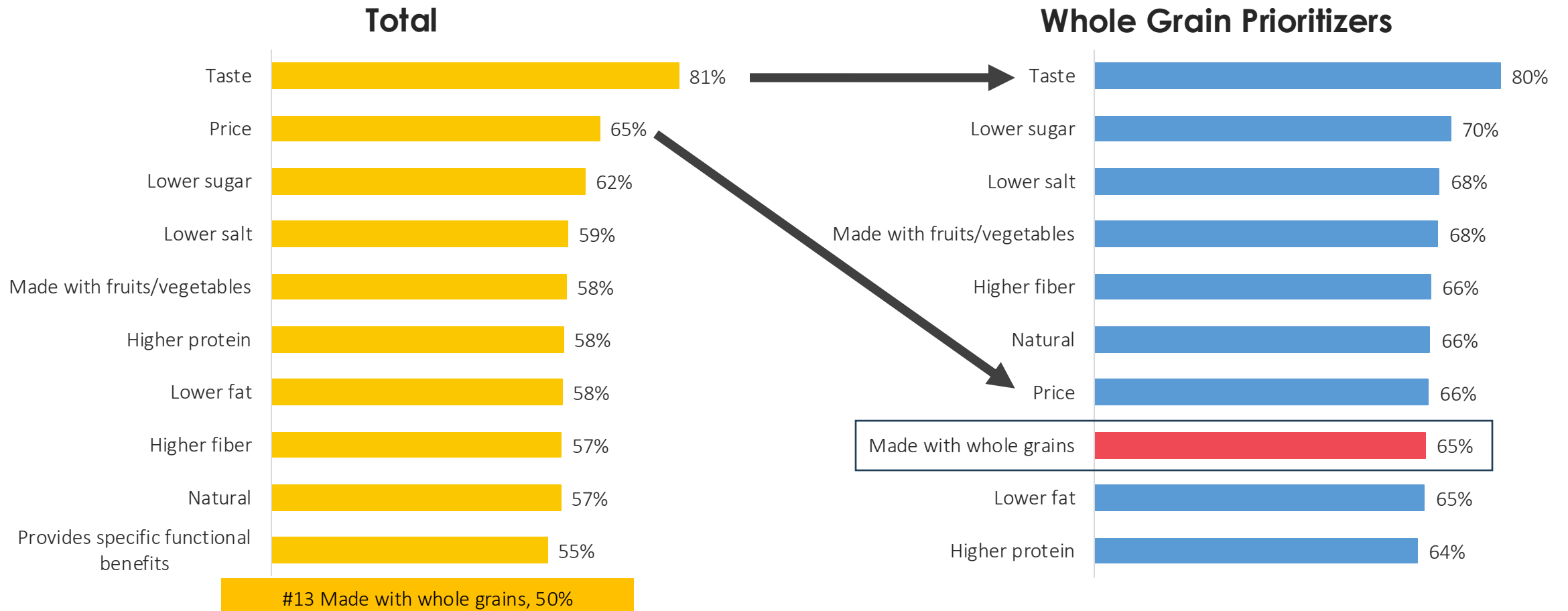


■ Increased ■ Same ■ Decreased ■ I don't snack

■ Healthier ■ Same ■ Less healthy

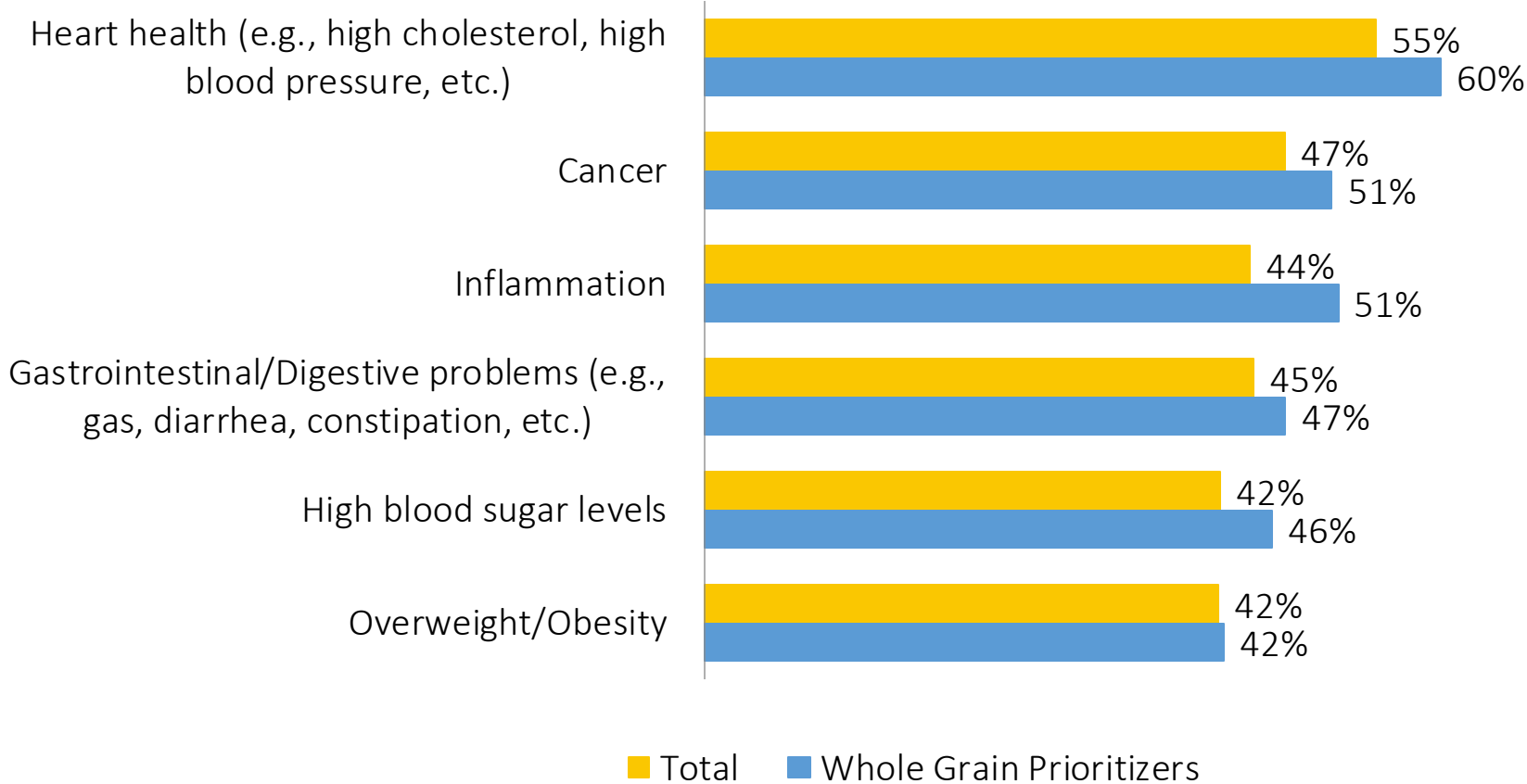
Taste Still Matters, Particularly in Snacks

Top 10 attributes when choosing a snack Extremely/Very Important



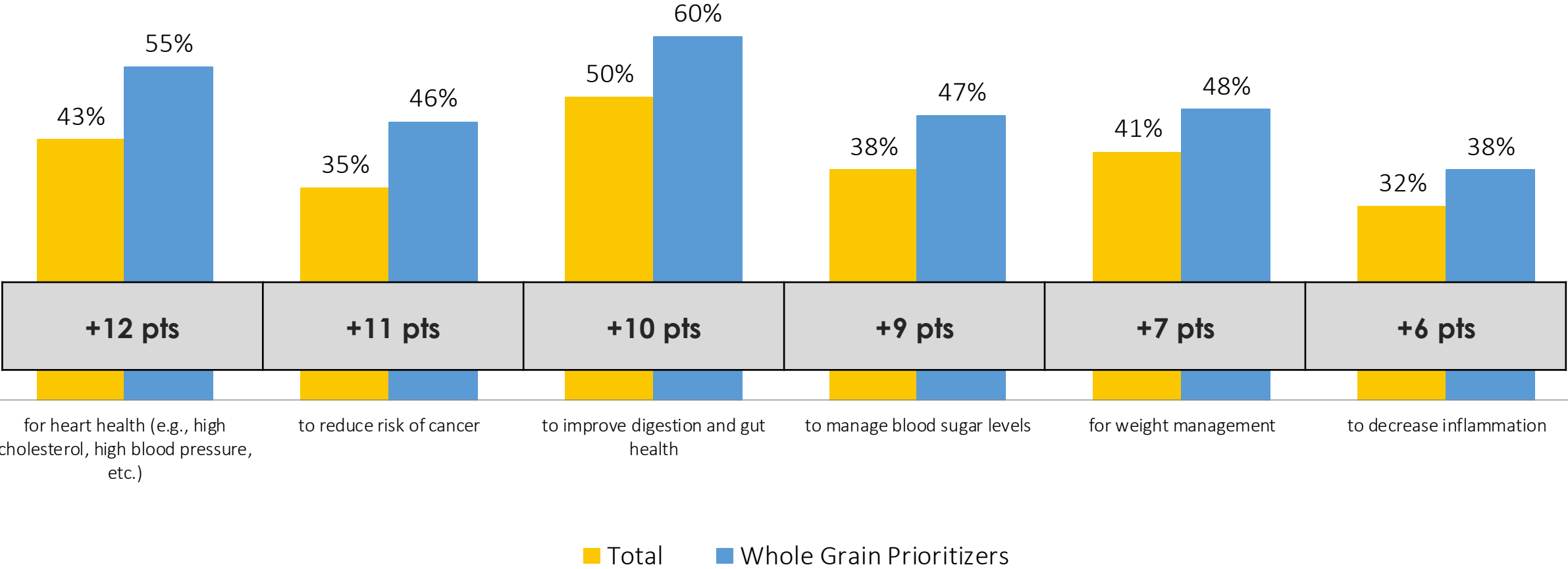
Health Concerns can be a Motivator

Health Concerns Extremely/Very Concerned



Concern Translates into Action for Whole Grain Prioritizers

Make Food/Beverage Choices for the Following Benefit
Always/Usually

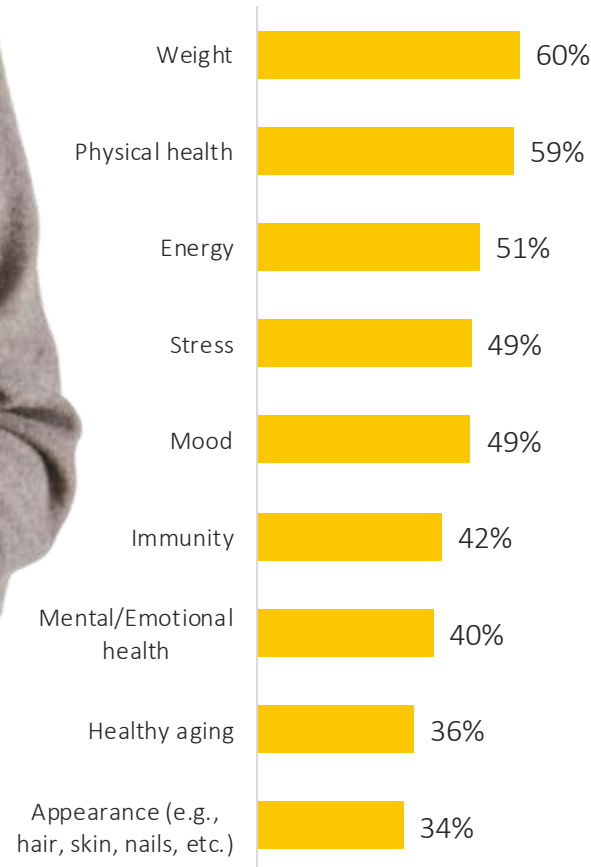


Gut Health = Whole Health

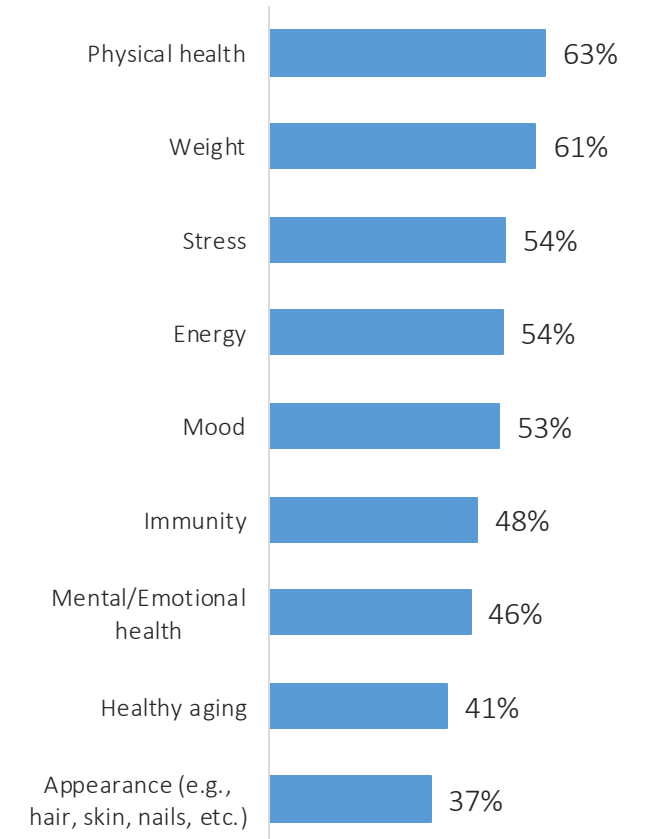
Which of the following do you believe are Impacted by Overall Digestive/Gut Health



Total



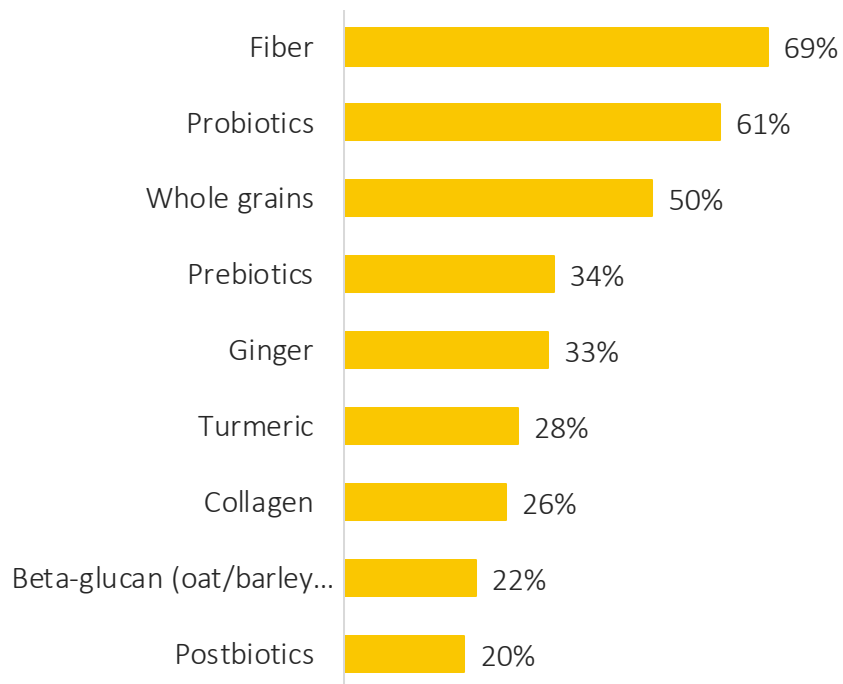
Whole Grain Prioritizers



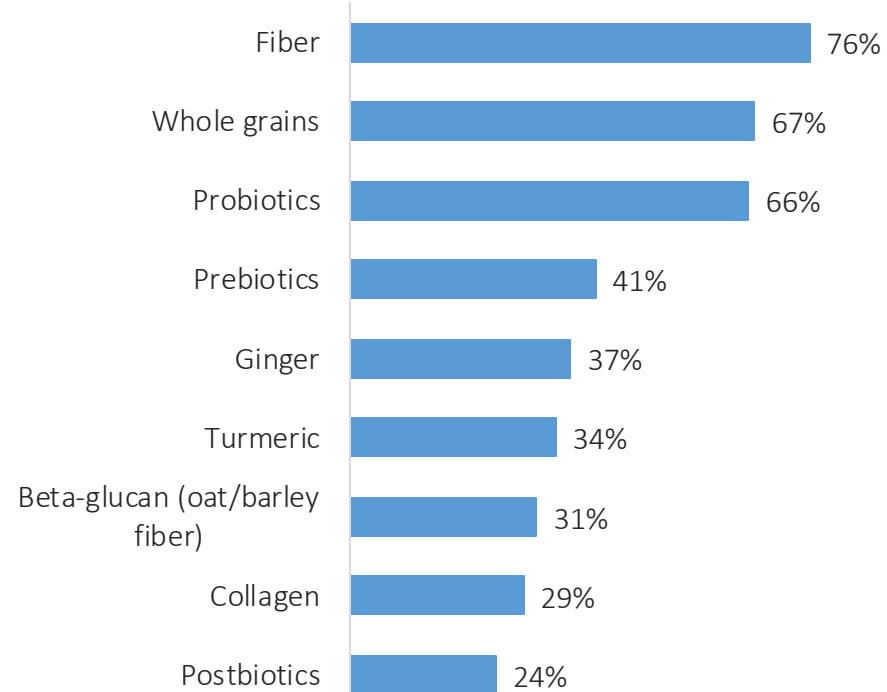
Whole Grains, A Gut Health Winner!

Ingredients of Interest to Improve Digestive/Gut Health

Total

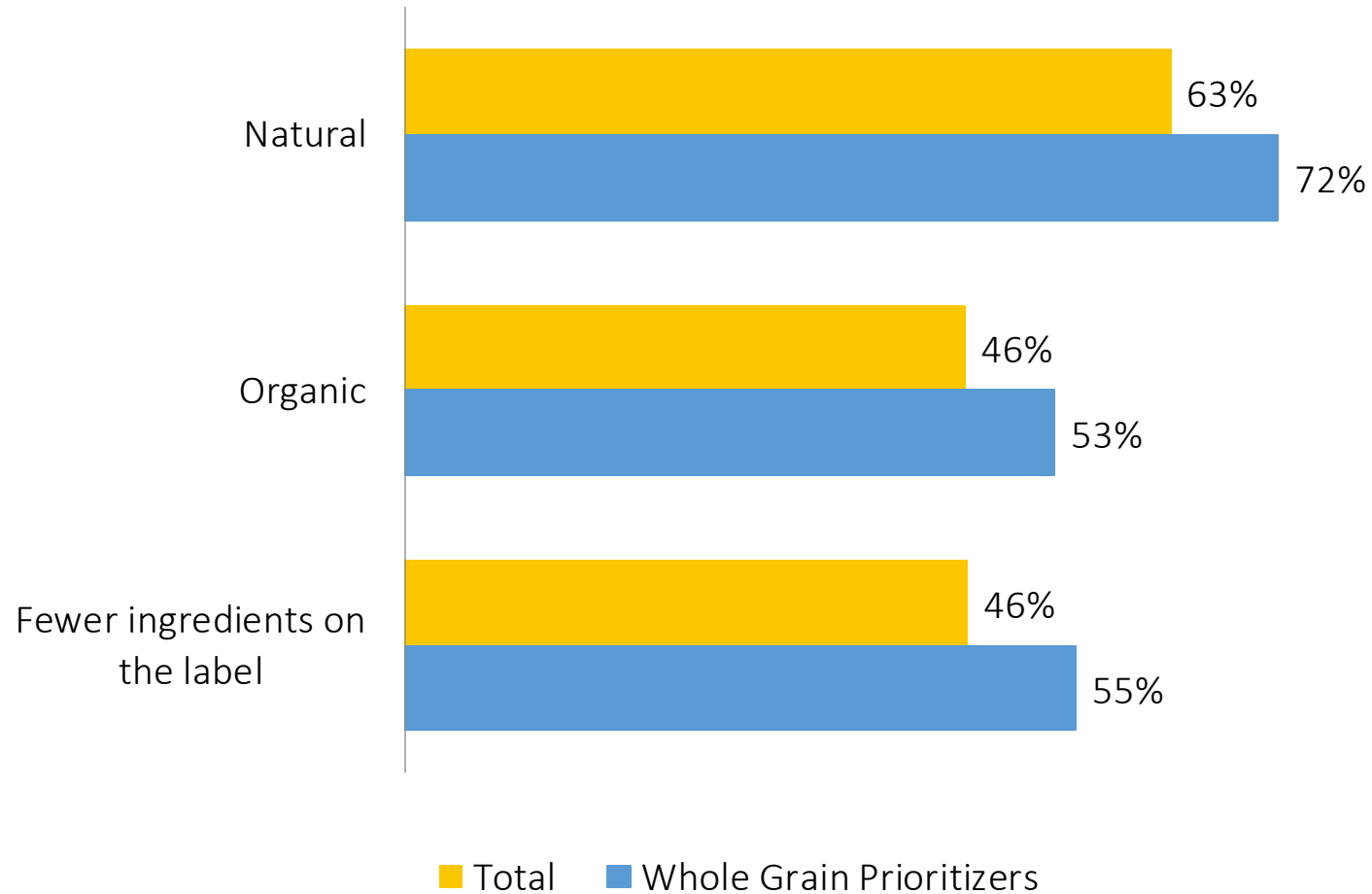


Whole Grain Prioritizers



Whole Grain Prioritizers Focus on Clean

Influence to Try a New Brand of Food or Beverage
Extremely/Very Important



Engaging with the Product Journey



Influence to Try a New Brand of Food or Beverage

Extremely/Very Important

Transparency (e.g., how the product is made, ingredient sources, etc.)



Ethically sourced (e.g., fair trade)



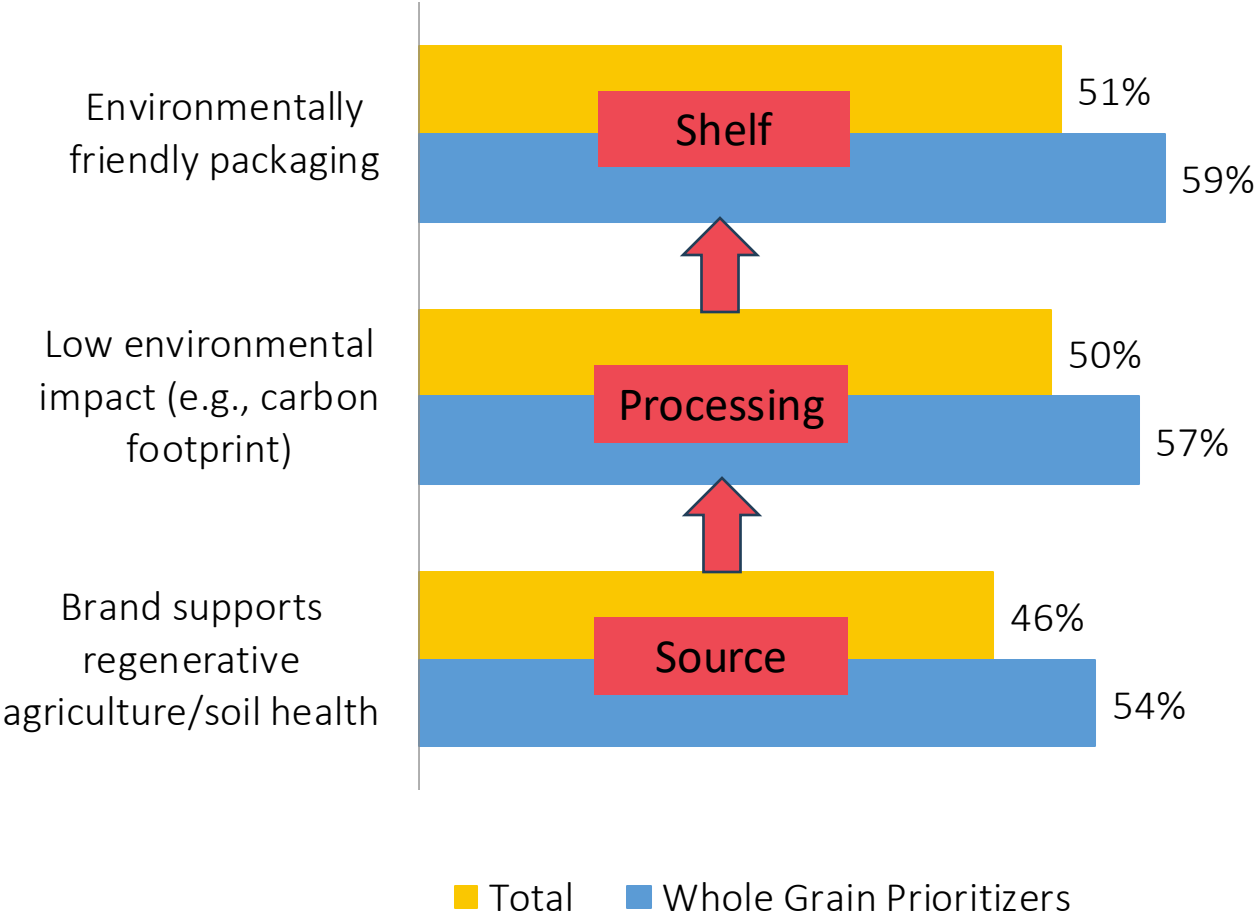
Traceability (e.g., QR/bar codes that trace back to the ingredient source)



■ Total ■ Whole Grain Prioritizers

Creating a Better Tomorrow

Influence to Try a New Brand of Food or Beverage Extremely/Very Important



Summary

- Whole grains are key to a healthy diet
- Consumers prefer natural fiber over added fiber
- Health-focused buyers seek more nutrition
- Transparency and sustainability matter
- Visit [HealthFocus.com](https://www.healthfocus.com) to learn more



METHODOLOGY:

Data included in this presentation is from the HealthFocus 2024 International Trend Study. When references are made to “global”, it reflects the global score for the 25 markets surveyed in the 2024 study.

A total of 13,517 interviews were completed with respondents who are at least 18 years-old and are the Primary Grocery Shoppers in their household (Primary Grocery Shopper is defined as making the majority or equally sharing the food-buying decisions in the household). The study was primarily fielded in Q1 of 2024 with at least 500 primary grocery shoppers per market.





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