

Baking Aisle Insider (Quarter 2 2024)

Gluten-free flour is on the rise

Take advantage of baking aisle opportunities with gluten-free

Right now, it's prime time to reach gluten-free flour customers in the baking aisle. The popularity of gluten-free foods is projected to grow to \$27.8B globally by 2032¹, and the U.S. gluten-free foods market is expected to reach \$4.12B by 2028².

U.S. gluten-free flour sales totaled more than \$396M in 2023, up from just under \$340M in 2022³

What was once a purchasing priority due to celiac disease and non-celiac gluten intolerance has transitioned to a mainstay diet for all types of shoppers. The Mayo Clinic states that many people perceive the diet to provide “better for you benefits,” such as overall improved health, weight loss, improved gastrointestinal health and athletic performance.⁴



Shoppers are searching for gluten-free

The demand for gluten-free products, including flour, is no longer a passing fad. The category is growing quickly, and younger shoppers are purchasing flour at well above average rates, making up the biggest purchaser demographic.

What's driving gluten-free flour purchases

While gluten sensitivity serves a major role for much of the shopping base, there is a wide range of key purchasing factors at play for those with and without gluten-sensitivity—health and wellness, curiosity, experimentation and recipe integrity.

Gluten-free flour purchasing reason	%
General wellness	50%
Household medical diagnosis(es)	44%
Curiosity about gluten-free flour's performance	22%
Experimenting with new flour options	19%
Best matches a recipe for specific baked good	18%
Specifically referenced/stated within a recipe	16%
Performs well with my baking project/likes outcome	9%
Avoid gluten because it's popular right now	4%



The gluten-free flour shopper profile

Gluten-free flour shoppers may represent a smaller portion of the total shopper population, but they're consistently purchasing flour at well above average rates due to high baking activity levels. In the past six months*, 13% of total flour shoppers have purchased gluten-free flours—but gluten-free shoppers purchased flour 4.8 times in the past 3 months*, which is 24% more than the average shopper. Gluten-free shoppers also baked 12.2 times in the past 3 months*—31% more than the average shopper/baker.

*as of June 2023



A closer look at what makes the gluten-free flour shopper different from overall flour shoppers

Younger consumer, 18-34 years old



- ◆ Female
- ◆ Latine
- ◆ Middle income, \$50-\$100k HH
- ◆ Lives in the Northeast or West (U.S.)
- ◆ Parent
- ◆ Self-classified expert baker, commonly leading to higher purchasing frequency

Meet gluten-free flour shopper needs with application-specific options

Shoppers are searching for specifics, so offer a variety

Whether it's gluten-free bread, pizza dough or cakes—targeting the products high on shopper's baking lists can offer an immediate connection point. Consider regularly evaluating new gluten-free flour types that might meet demand for new innovations.

5.7 is the average number of different items made with flour noted by home bakers in the past six months*

Gluten-free shoppers bake a variety and bake often

These shoppers are often self-classified expert bakers, and they regularly bake a diverse set of products in their home kitchens.

Top five gluten-free flour items baked at home



Gluten-free shoppers are all about innovation

This is also a group that's eager to learn about the latest gluten-free products. Their diverse baking activity often drives this innovation, so consider featuring emerging flour types to help connect on their purchase paths.

Most-popular new gluten-free flour types shoppers "would definitely purchase"



Create a gluten-free flour destination

Consider Private Label expansion to help fill the shelf gap and capitalize on more innovative gluten-free flours that shoppers are seeking. Seventy-eight percent like to shop around and look at different options, and 76% take closer looks at flours with different packaging than other products, so those that stand out on shelves are garnering interest.

Prime opportunities for Private Label

Expanding Private Label presence can help capture a greater share of consideration from gluten-free shoppers who are already engaged with the aisle, as only about 10% of gluten-free units sold are Private Label.³



Create buzz for all flour shoppers with special callouts

One in four flour shoppers and an overwhelming majority (85%) of gluten-free shoppers endorse the idea of a gluten-free section in the baking aisle. A dedicated space or signage callouts can help make it easy for home bakers to find what they need or are interested in trying.

85% of gluten-free flour shoppers agree they'd like a special section in the bakery aisle dedicated to gluten-free baking supplies like flours, mixes, etc.

Gluten-free flour shoppers' purchasing behaviors:

39% are buying Brands only

7% are buying Private Label only

54% are buying both Brands and Private Label

Ardent Mills is transforming how the world is nourished. As the premier flour-milling and ingredient company with more than 40 locations focused on traditional wheat, quinoa, chickpeas, pulses, organic and gluten free products, we cultivate the future of food to help our customers and communities thrive.

The information provided in Baking Aisle Insider was collected during a recent large-scale survey of flour shoppers 18 years and older with insights regarding purchasing intent and baking behaviors specific to gluten-free flours. We've boiled down the proprietary data to provide takeaways on gluten-free flours to help you consider new opportunities and sharpen your focus on making customers happy.

Looking to take these insights into action in your baking aisle? Contact your Ardent Mills Account Manager or info@ardentmills.com to see how we can help.

1. Global Market Insights, Gluten Free Food Market Size, 2023

2. United States Gluten Free Food Market Outlook, Renub Research, 2023

3. Nielsen Byzzer 52wks ending 12/30/23. (Gluten Free Claim)

4. Mayo Clinic, Nutrition and Healthy Eating, Gluten-free diet, 2021