

What We're Watching

No. 10 – 2023

Most people would likely agree that grains are foundational to the food landscape. But current dynamics raise the question:

are grains actually an underleveraged ingredient?

- ◆ Food industry stakeholders continue to confirm the value of grains through high-scale usage on menus and in retail food products. Although overall usage within all of food has remained relatively flat in the past 5 years, 2023 has seen elevated consideration across specific food types and within specific grain types.
- ◆ Consumers certainly know of grains (any). In fact, overall awareness is nearly universal. And perceptions about how they deliver taste and nutritional value when used as an ingredient are very favorable. But there is softness in what consumers really know about grains, and opportunity lies in the closing of that gap.

Implications and Opportunities:

- Prioritize usage (and communication) of grain-inclusion in food items. Grains carry strong equity with consumers when it comes to their contribution to the overall great taste of food items and there is no more influential factor on the food choices of consumers.
- Communicate the nutritional benefits of grains when used as an ingredient to fill the knowledge gap that exists with some consumers.
- Evaluate opportunities with alternative grains that are being used at dynamically increased levels in 2023. Are Spelt, Pearl Barley or Millet on your radar.¹

¹ - Non-Exhaustive



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Grains (any) have a strong standing with all food stakeholders, one that offers opportunity for even greater leveraging.

Consumers are near universally aware of, and favorable to, grains (any).

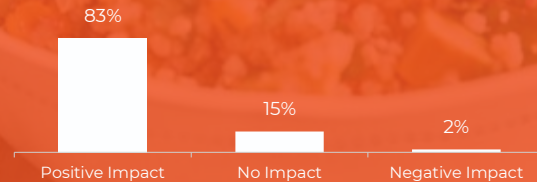
Familiarity with grains (any) is strong but deep knowledge is not fully maximized.

54% | Very Familiar/Knowledgeable About Grains (any) ¹

38% | Somewhat Familiar/Knowledgeable About Grains (any) ¹

Consumers* strongly appreciate the **taste** contribution grains (any) make as an ingredient.

Impact of Grains on TASTE of food items¹



*Among consumers familiar with grains (any)

The more consumers know about grains (any), the more favorable they are to the nutritional contribution they make as an ingredient.

Grains (any) have a **POSITIVE** Impact on the Nutritional Value of food items:¹

87% | **73%**

% Agree Among Consumers
Very Familiar/
Knowledgeable About Grains

% Agree Among Consumers
Somewhat Familiar/
Knowledgeable About Grains

Foodservice is leveraging the appeal of grains (any) by increasingly offering them as stand-alone entree.

+13%

Growth in the number of Grain Salad Entrees on Total Foodservice menus:

One year growth through end of Q2 2022.³

Which grains are among the most commonly used in Grain Salad Entrees? Here are a few of the lead options:³

- Quinoa
- Brown Rice
- Bulgur Wheat
- Barley
- Chickpea

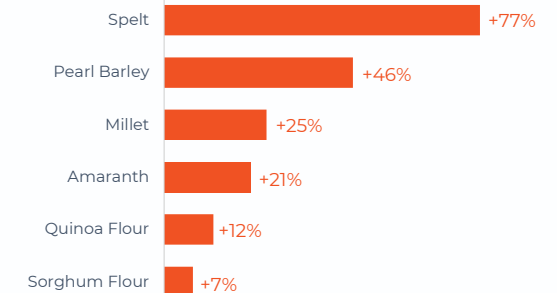
*Non-Exhaustive

Grains are seeing elevated usage in many new products in 2023. Here are some subcategories and specific grains leading the way:

Share of New F&B Products including Grains (any)²

Subcategory*	2023 (ytd) vs 2022
Dog Snacks/Treats	+18%
Snack Mixes	+16%
Ready Meals	+13%
Wet Soup	+12%
Instant Noodles	+11%
Cakes - Pastries & Sweet Goods	+11%

Share of Usage in New F&B Products:²
2023 (ytd) vs 2022²



*Non-Exhaustive