




Retail Flour: Meeting Consumers Where They Are

-  1. GLP-1 in U.S.
-  2. Gluten-Free Flour Opportunity



Trend 1: GLP-1 in the U.S.

The question is no longer *'if'* GLP-1 meds will have an impact, it is now *'how much'* of an impact will they have.

Adoption has reached measurable levels and continues to grow dynamically- **almost one in 10 U.S adults are on GLP-1s.** For perspective, that's nearly the entire population of Florida.

Barriers to adoption, such as high costs, limited insurance coverage, injection format, and negative social stigma **are falling.**

GLP-1 users are prioritizing foods with high nutritional value; seeking **benefits like high protein, fiber, and hydration.**



[Click to see how to meet these needs](#)



Ardent Mills.

Dislike Needles
Believe Will Be Ineffective
Distrust Pharma. No Need
Love Food Safety Stigma
Side Effects No Interest
Doctor Won't Prescribe Expensive
Long-term Commitment
Insurance Coverage



Consumers report several barriers to considering taking or not taking a GLP-1¹

53%

Of U.S Consumers WOULD NOT consider taking a GLP-1

28%

Of U.S Consumers WOULD consider taking a GLP-1



Ardent Mills

³ Ardent Mills Proprietary Research, U.S Consumers 18+; Size of the phrase indicates the percentage of consumers who reported concern, larger text = higher percentage.



Barriers to consideration/adoption, specifically: *safety concerns, high costs, and social stigma*- are falling due to pharmaceutical innovation and government recognition.

Social Stigma

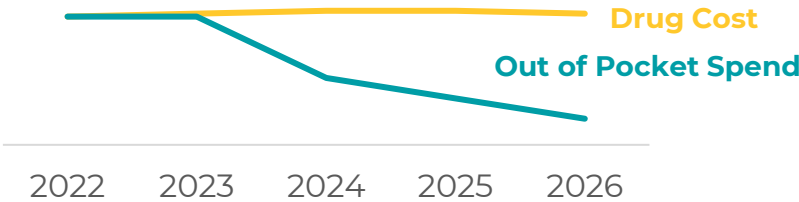
High Costs

Needle Aversion

- Tennis star, Serena Williams, was featured in one of many GLP-1 commercials shown at the Super Bowl. Brands include RO, and Hims & Hers.
- **“I’m on Ro. 34 pounds down on GLP-1s. Healthier on Ro. Supported on Ro. FDA approved GLP-1 options, now even in a pill. Weight loss expertise / trust. I’m moving better on Ro. I’m feeling better on Ro. I’m Serena Williams. This is me, on Ro.”**¹



- While GLP-1 list prices remain near \$1,000+/month, typical consumer out-of-pocket spend fell to ~\$300 by 2025 and are trending toward ~\$150 - \$300 by 2026.
- **What’s better than low out-of-pocket? Employer Insurance coverage. In 2026, 1/3 of employer programs (nearly 1/2 of large employers) are covering GLP1-s, specifically for weight loss.**²



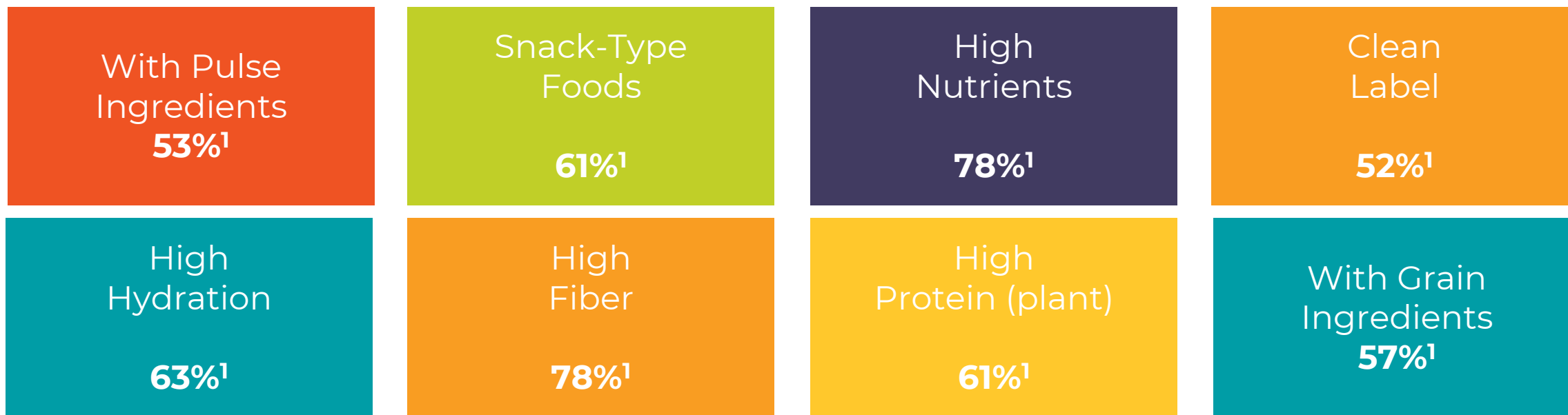
- Novo Nordisk launched the **first-ever GLP-1 pill** for weight loss in the U.S. on January 05, 2026 – **FDA approved.**³





Consumers currently taking GLP-1s do report some intentionality in the characteristics they are seeking from the foods they do eat.

Food Characteristics Prioritized while on GLP-1s (list provided)



Others included for context and benchmarking: High in protein (animal) - 86%, Low in Calories – 80%, High Hydration – 75%, Low Carb – 73%

⁵ Ardent Mills Proprietary Research, U.S. consumers 18+ who claim to be taking a GLP1, (directional results due to limited sample sizes); 1- % of consumers who claim to be prioritizing foods with the respective characteristic due to taking GLP-1s



Stack up on better-for-you benefits

Our products can provide the following:

Supports digestive function ¹

- ◆ Whole Chickpeas & Chickpea Flour
- ◆ Lentils
- ◆ Whole Wheat Flour (incl. UltraGrain® Whole Wheat Flour)
- ◆ Sorghum
- ◆ Millet
- ◆ Teff
- ◆ Amaranth
- ◆ High Fiber Barley

Maintains muscle mass ²

- ◆ Whole Chickpeas

Supports satiety ³

- ◆ High Fiber Barley

1 – The **fiber** in the pulses and whole grain products listed above supports digestive function; 2- The **protein** in whole chickpeas maintains muscle mass; 3 – **Soluble and insoluble fiber**, when part of a diet low in saturated fat and cholesterol, are key for increased satiety

*Ardent Mills does not endorse, recommend, or support the use of any ingredient or product to diagnose, treat, cure, or prevent any disease or to affect the safety, efficacy, performance, or outcomes of any GLP-1 medication or related therapies. Customers are solely responsible for ensuring that any product labeling, marketing, advertising, or claims comply with all applicable federal, state, and local laws and regulations.



Capitalize on the Opportunity

If GLP-1 medications remain a viable option, a ‘best case’ scenario will cause **meaningful ongoing disruption**; a ‘worst case’ scenario will lead to **significant** implications for the CPG industry.

But...existing and/or new portfolio products, innovation and more offer opportunities within the pressures and challenges.

Ardent Mills is the solution* when it comes to nutritional benefits today’s consumers are looking for.



Trend 2: Gluten-Free Flour Opportunity

Marketplace dynamics confirm continued opportunity with gluten-free flours.

Consumer participation in the eating behavior has **reached scale** and is **still growing, driven** mainly **by lifestyle choice**.

- Younger consumers (18-34) are leading, future-proofing the opportunity.

Gluten-Free Flour shoppers are a small but active consumer population.

- They purchase flour at **well-above average** rates (+1.6x per month).
- Their baking activity is also **elevated** (+4x per month).

Yes, avoidance of gluten is a primary driver of purchases – but that is far from the only, perhaps even the main, factor.

Private Label/Store Brands may be **missing an opportunity** to **win greater consideration and share of Gluten-Free Flour purchases**.

The priority flours offer other **benefits** and buying points that are as, maybe more, compelling as gluten-free status.



[Click to see how to meet these needs](#)



Gluten-Free flour is experiencing strong and continued growth.



Flour Shoppers express strong interest in Gluten-Free products, which fits trends that are driving growth.

Performance

- GF Flour w/o corn represents **22.2m units sold²**
- +5.7% volume %CHG vs last year², outpacing the category.
 - +4.5% volume 2yr CAGR, long term growth.
- **Growing share** in total flour
- **GF 1-1 flour** and Almond represent 56.7% share.

Growth Drivers

- Consumer health awareness
- Dietary trends
- Expansion of Plant-Based Diets
- Clean label
- Younger generation influence
- Premium National Brands

Application

- **Baking:** Cakes, pastries, muffins, biscuits, cookies, and quick breads.
- **Thickening:** Sauces, gravies, soups, and stews.
- **Coating/Breading:** Chicken, fish, and vegetables.
- **Pasta/Noodles:** Making homemade GF noodles.

Benefits

- **Digestive health** management
- **Nutrient-Dense** Options
- Environmentally Friendly
- **Versatile for baking**





Capitalize on the Opportunity

Recognize the value that Gluten-Free Flour Shoppers bring to the aisle and align to their interests and requirements.

Ardent Mills is the solution when it comes to gluten-free flours.

Ardent Mills specializes in the milling of gluten-free specialty grains and pulses.



Capabilities: Certified gluten-free flour facility, fine granulation flours, extensive specialty grain portfolio, pulse flour options, cleaning & sorting grains, Mill, blend & mix capabilities, and custom roasting. flexible retail pack sizes (10 oz – 8 lb, 25 lb, 50 lb, totes)



Qualifications: FDA FSMA compliant, USDA compliant, certified gluten-free, BRC Food Safety Certified*, Meets Non-GMO requirements, USDA Organic, kosher certified, and integrated, transparent, end-to-end supply chain.



Integrated equipment and handling to ensure **safety at every step.** Providing retailers with gluten-free products and gluten-free manufacturers the ingredients to produce the highest quality products.

Recommendations

- ◆ **Expand gluten-free Private Label presence** to capture greater (or at least fair) share of consideration.
- ◆ **Gluten-Free 1-1 & Almond Flour** are **key products** on the retail shelf.
- ◆ Acknowledge the **“health” factor** that plays a primary role in the purchase of Gluten-Free Flour
- ◆ Evaluate new Gluten-Free options that capture promising conceptual enthusiasm, start here: Bean, Oat, Ancient Grain Blend, Chickpea.

*certification in process, Spring 2026

1 - Not all products qualify for certifications. To see which products qualify for each certification, please work with your sales rep.



Thank you



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