



Retail Flour: *Winning in the Era of Benefit Stacking*



1. Benefit Stacking

2. Retail Flour Opportunity



Organic



Whole Wheat



Gluten Free



Ardent Mills.



Are you benefit stacking?

Benefit stacking is the newest consumer mindset focused on **eating foods that deliver more of what we want, with every bite.**

On average, today's consumer **seeks out 8.1 nutritional benefits at once** (up 6.6% vs. year ago), and their priorities tend to overlap.

58% of consumers say that **flour plays a role** in trying to meet those dietary goals/priorities.

Implication: Win with products that satisfy multiple priorities in one familiar, accessible purchase.



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

Lack of personal
willpower
Assumed
High bad taste
Cost/Price Lack of knowledge
Distrust Brands Lack of education
Lack of availability by brands
where I shop

Lack of access to
places to buy
these foods

Other people in my
household don't care for
these foods

Consumers report
several barriers to
purchasing foods that
deliver multiple benefits
at once

Cost/price, concerns about
taste, and **lack of**
knowledge/trust pose some
of the most meaningful
challenges to consumers'
benefit stacking behavior.

Luckily, these factors **present**
an opportunity to innovate to
fit consumer needs with
emerging ingredients, as well
as a chance for brands to
educate consumers and
shape the narrative on the
benefits they offer.



Ardent Mills



On average, U.S. adults participate in about eight wellness behaviors at one time, and there's overlap in what they prioritize

Retailers don't need separate solutions for every benefit. They need products that stack multiple benefits simultaneously.

Stacking Examples: Above Average Participation/Priorities

Organic Eaters also prioritize...	Whole Grain Eaters also prioritize...	Gluten-Free Eaters also prioritize...	High Protein Eaters also prioritize...
<ul style="list-style-type: none">• Artisan/Authentic Foods• Clean Label• Clean/Cleaner Eating• Sustainably Grown Foods• Regenerative Agriculture Foods• Gluten-Free• Ethically Sourced Foods• Non-GMO	<ul style="list-style-type: none">• Metabolic Health• Anti-inflammatory foods• Heart Health• Wheat-Flour based foods• Mediterranean Diet• Digestive Health• Avoid Ultra Processed Foods• Organic	<ul style="list-style-type: none">• High Protein• High Fiber• Keto-Friendly• Digestive Health• Sustained Energy• Organic• Plant Based/Plant Forward• Plant Protein	<ul style="list-style-type: none">• High Fiber• Keto-Friendly• Gluten-Free Eating• Sustained Energy• Avoid Ultra-Processed Foods• Metabolic Health• Plant Protein• Heart Health

4 Ardent Mills Proprietary Research; U.S. Consumers 18+; Specifics of the Behavior is Self-Defined by the Consumer
1 – non-exhaustive, considers 48 different behaviors, shown are behaviors that each Eater group over-indexes in participation by 150 or > compared to the national average; non-exhaustive

A familiar, foundational ingredient can deliver multiple benefits in one purchase decision.

Three segments where benefit stacking is driving retail growth



ORGANIC WHEAT

Brings **clean label**, **better-for-you**, **sustainability** and **organic appeal** to private label flour offerings



WHOLE WHEAT

Delivers **whole-grain nutrition** while stacking **fiber** and support for **GLP-1 friendly** eating



GLUTEN-FREE 1:1

Make **gluten-free** baking easier with our **convenient** cup-for-cup solution designed for everyday favorites

Organic Wheat Flour

The Clean Label & Wellness Growth Platform

BENEFITS STACKED: Organic + Clean label + Sustainability + Better-for-you

\$92.3M

L52 organic wheat sales, +13.4% vs. year ago.

Growth Platform

72.8%

Organic AP share of organic wheat volume, +10.3% vs year ago

Core Everyday Anchor

+15.0%

Latest 4-week Organic AP volume growth,

Momentum is Accelerating

- **Consumer tailwind:** U.S. organic sales hit a record \$76.6B in 2025, up 6.8% — double the comparable market, led by Millennial and Gen Z shoppers.
- **Growth is real demand:** organic wheat is 53.0M lbs (+11.6%) on 12.6M units (+9.9%), not price alone.
 - **Organic AP is the must-stock anchor:** 38.6M lbs, 72.8% of volume, +10.3% growth vs year ago, and a +12.1% two-year CAGR.
 - Momentum is Brand led (65.9% share) up +11.6%, but Private Label Organic AP is a 'must have' on retail shelves.

CATEGORY LEADER ACTION

1 PROTECT ORGANIC AP

Keep Organic AP the shelf anchor; reinforce USDA Organic as a key claim on pack.

2 UNLOCK WHITESPACE

Close Private Label and distribution gaps by retailer.

3 EXPAND SELECTIVELY

Add Organic Bread (+35.7%) or Whole Wheat (+6.6%) where demand supports it.



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meet these needs**



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Whole Wheat Flour

The Nutrient Density Opportunity

BENEFITS STACKED: Whole grain + Fiber + Heart Health + Satiety²

46.0M lbs

L52 packaged Whole Wheat volume, +4.4% vs. year ago.

Resilient Pocket

+4.4%

Volume growth vs. +0.9% for total flour

Outpacing Total Flour

+2.2%

Two-year volume CAGR

Steady, Not Spiky

- **Consumer tailwind:** 75% say they would buy or eat foods made with whole grain, and 40% are more likely to purchase with a whole grain package callout.
 - Perception leads conversion: Whole Wheat has strong health equity (+63% net healthiness perception), creating a clear opportunity to boost purchase by reinforcing taste, versatility, and everyday relevance.
- **Growth is concentrated:** Private Label (40.1% share, +4.9%) and King Arthur (39.6%, +16.4%) drive the pocket; Gold Medal is the -31.3% drag.

CATEGORY LEADER ACTION

1 FOCUS THE ASSORTMENT

Back the proven traffic drivers — King Arthur and Private Label — and review declining legacy items.

2 BUILD A VALUE LADDER

Private Label is 40.1% of volume at a materially lower unit price, preserving value-shopper access.

3 CLOSE THE TASTE GAP

Lead with fiber and whole-grain nutrition and reinforce baking success and taste.

Source: 1 - Nielsen Total FMCG Retailers, L52 W/E 08-22-2026; 2- Ardent Mills proprietary research with, U.S. consumers 18+



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Gluten-Free 1-to-1 Flour

Wellness & Convenience Drive Growth

BENEFITS STACKED: Gluten-free + Convenience + Better-for-you

\$63.1M

L52 Gluten-Free 1-to-1 sales
Specialty Scale

18.0M lbs

L52 volume, +6.6% vs. year ago
Sustained Growth

+8.3%

Latest 4-week volume growth
Momentum is Building

- **Consumer fit:** Gluten-Free flour shoppers purchase flour at well-above average rates (+1.6x per month) and their baking activity is also elevated (+4x per month).
 - **Designed for convenience:** allowing bakers to replace traditional wheat flour in recipes at a 1:1 ratio without complex adjustments.
 - **Durable need:** 50% cite general wellness and 44% cite diagnosed household issues — demand is lifestyle-led, not a fad.
- **Brands drive the segment:** King Arthur units +28.8% (36.4% share) alongside scale leader premium specialty brand at 41.8% — together 78.2% of segment units.
- **Private label deserves more:** 11% share today, despite strong store-brand engagement among Gluten-Free shoppers.

CATEGORY LEADER ACTION

1 PROTECT THE CORE SET

Maintain Bob's Red Mill for scale and King Arthur for growth — together 78.2% of segment units.

2 FIX THE PRIVATE-LABEL GAP

Bring in a GF 1-to-1 store-brand item where retailer trust and GF demand support it.

3 SELL BAKING SUCCESS

Lead with simple 1-to-1 substitution and reliable taste and texture; support with recipe education.

**Click to see how to
meet these needs**

Capitalize on the Opportunity

Benefit stacking is the mindset: consumers continue to seek foods with multiple functional benefits.

Organic, Whole Wheat and Gluten-Free 1-to-1 are where that demand is already converting into growth.

Ardent Mills is the solution across the benefit-stacking aisle.



Benefit Stacking Is the Through-Line

Consumers want more from every bite — and flour is how they get it.

8.1

nutritional benefits sought at once, +6.6% vs. year ago

58%

say flour plays a role in meeting their dietary priorities

Barriers

to stacking also present opportunities to educate and innovate

Recommendations



Organic AP Flour — anchor the organic set

72.8% of organic volume | +10.3% vs. YA | +15.0% latest 4 weeks

- Keep it the shelf anchor and close the Private Label gap.
 - Organic Bread Flour (+35.7%) — expand where demand supports it
 - Organic Whole Wheat Flour (+6.6%) — round out the organic offering



Whole Wheat Flour — focus the assortment

46.0M lbs | +4.4% vs. +0.9% total flour | +2.2% two-year CAGR

- Back the proven drivers, build a value ladder, and lead with fiber, taste and baking success.



Gluten-Free 1-to-1 Flour — build the value ladder

\$63.1M | 18.0M lbs +6.6% | accelerating to +8.3% latest 4 weeks

- Protect the core brands driving 78.2% of units and give Private Label the share it deserves beyond 11%.

Source: Nielsen, Total FMCG Retailers, latest 52 weeks ending 08-22-2026; Organic Trade Association, Organic Market Report 2026; Ardent Mills Proprietary Research, U.S. consumers 18+.



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