

What We're Watching

07 – 2025

What's an ingredient that is particularly well-positioned for these dynamic times?

Whole grains!

- ◆ Whole grains carry a lot of positives with consumers in the current environment. Purposeful consumption is already high and is projected to grow further. But it is the versatility of whole grains that seems to resonate with consumers right now. Perceptions are favorable across a range of relevant priorities - from cleaner eating to weight management to nutrient delivery and more.
- ◆ Manufacturers clearly recognize the opportunity. Following several years of softened whole grain use, inclusion in new products year-to-date is up nearly double digits. Whether the motivator is to present consumers with nutrient-dense products, ingredient lists that are recognizable, or ingredients perceived as minimally processed, the renewed focus is paying off in increased consumption for many categories across the store.

Implications and Opportunities:

- **Prioritize** the inclusion of **whole grains** in product formulations. Consumers credit them *both* with **delivering** the **positive benefits** guiding their decisions and as **offsetting** the **negative characteristics** they seek to avoid.
- Looking for whole grains that have **momentum** in the marketplace? Consider emerging options like **Barley, Buckwheat, Sorghum**, and the established options of **Oat** and **Whole Wheat**.
- **Communicate** and **call out** the status of your foods that include whole grains; *only* one in five consumers strongly agrees that it is easy to identify these foods when shopping/ordering.¹

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In 2025, whole grains have become an especially high-value ingredient for both food industry stakeholders and consumers.

Food manufacturers are developing new products with whole grains at an accelerated rate in 2025 (ytd).

Share of Total F&B New Product Launches with a Whole Grain Claim/Positioning¹



+9%

2025 (ytd) vs 2024

Multiple grains are seeing increased consideration by food manufacturers; here are a few of the specific whole grains leading the way:^{*1}

- ◆ Amaranth
- ◆ Oat
- ◆ Whole Wheat
- ◆ Barley
- ◆ Sorghum
- ◆ Buckwheat

*non-exhaustive

Retail sales of products that communicate their whole grain ingredients to consumers are on the rise in several categories.

Unit Sales of Products with 'Whole Grain Stated'²

Category*	% Trend vs YaG
Artisanal Prepackaged Bread	+61%
Bagel Chip/Pita Chip/Pretzel Chip	+28%
Cereal and Granola Bars	+12%
Shelf Stable Main Course	+4%
Packaged Flour	+3%

*non-exhaustive

Consumption of whole grain foods is a behavior of both current scale and future growth.

59% of consumers report they currently participate in whole grain food eating³

Participation is projected to increase by **+18%** by the end of 2025³

Appreciation is strong enough to earn a claimed willingness among consumers to pay more for whole grain foods.

55% of consumers claim to be willing to pay *more* for grain-based foods that include whole grains³

Claimed willingness to pay more is highest among consumers 18 - 24 (**59%**) and 25 - 34 (**62%**)³

Whole grains hold favorable standing with consumers on many of the priorities driving food choices today.

Whole grains check a whole lot of boxes with consumers.

Whole Grains...	% Agree ^{*3}
are good for the body	89%
are nutrient dense/rich	88%
support satiety (the feeling of being full)	85%
support cleaner label/eating	79%
are minimally processed ingredients	71%

*non-exhaustive, among consumers familiar with whole grains