

What We're Watching

05 – 2025

Consumers are building their food choices from the bottom up.

Ingredients matter. A lot.

- ◆ Ingredients are getting increased consideration from consumers. In fact, ingredients are often the *first* consideration when purchases and orders are being made. Why? Consumers have elevated understanding that the goals they are hoping to achieve are enabled by the ingredients, like Grains.
- ◆ Manufacturers recognize that versatile ingredients are needed to connect with the diverse priorities that are driving consumer choices. New product launch activity through the first-half of 2025 show that Grains are seen as *that* type of valued ingredient. Use of Grains (category) is +1.3% compared to 2024 and presence of specific grains is growing even faster: Wheat Flour (+3%) Whole Wheat Flour (+5%), Pearled Barley (+17%), Sorghum Flour (+23%) to name a few.¹

Implications and Opportunities:

- **Prioritize** (and **communicate**) the ingredients in finished products that consumers are seeking—they are actively looking for them.
- Move toward **less-processed** ingredients like **whole grains**, not only will favor be given for **nutrition, clean label** but consumers may be willing to **pay** somewhat **more**.
- Include Grains in product development, advantages can be earned with both established ingredients (**Wheat Flour, Whole Wheat Flour**) and emerging grains (**Sorghum Flour, Pearled Barley**).

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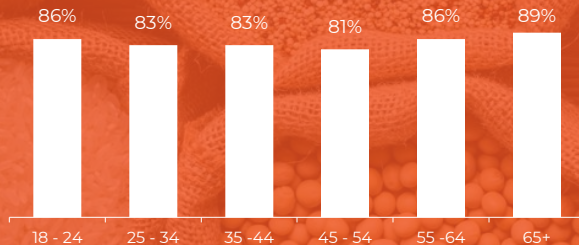
Ingredients, Grains included, are shaping the food choices of nearly all consumers.

Ingredient consideration is wielding foundational impact on food decisions.

Most consumers agree on the importance of ingredients:
*'Ingredients play a direct role in decisions when choosing the types of foods I eat.'*¹

85%

Ingredients' influence extends across all age groups:
'Ingredients play a direct role in decisions when choosing the types of foods I eat.'



Most consumers agree that Grains can be a positive ingredient contributor.

Consumer Perceptions about Grains:¹

Statement about Grains*	% Agree
...are good for my body	89%
...play a positive role in a nutrient rich/dense diet	88%
...are minimally processed when used as an ingredient	61%

*non-exhaustive

Menu items made with Ancient Grain ingredients are growing in foodservice.

+21% in menu penetration of items made with Ancient Grains: May 2025 vs May 2024.²

Increasing usage is in-step with consumer discussion about Ancient Grains: **+14%** in social discussion over the past year.²

Consumers claim that less-processed ingredients earns a willingness to pay a premium for finished products that include them.

58% of consumers agree they are willing to **willing to pay** more for foods that use **whole** and/or **less-processed** ingredients.¹

Willingness is **+11%** higher among consumers who 'regularly' check ingredient lists on the foods they buy.¹

Ancient Grains are an example of ingredients that are driving consumer consideration across a wide variety of categories.

Unit Sales Last 52 Weeks versus Year-Ago: Products with Ancient Grains Stated³

Category*	Unit Change
Cereal	+38%
Prepackaged Cookies	+36%
Artisanal Prepackaged Bread	+21%
Sandwich Prepackaged Bread	+17%
Pretzel	+4%

*non-exhaustive