

Whole Grains and Ancient Grains: A Fit for Positive Nutrition and Today's Consumer Trends

November 2, 2022

About Oldways

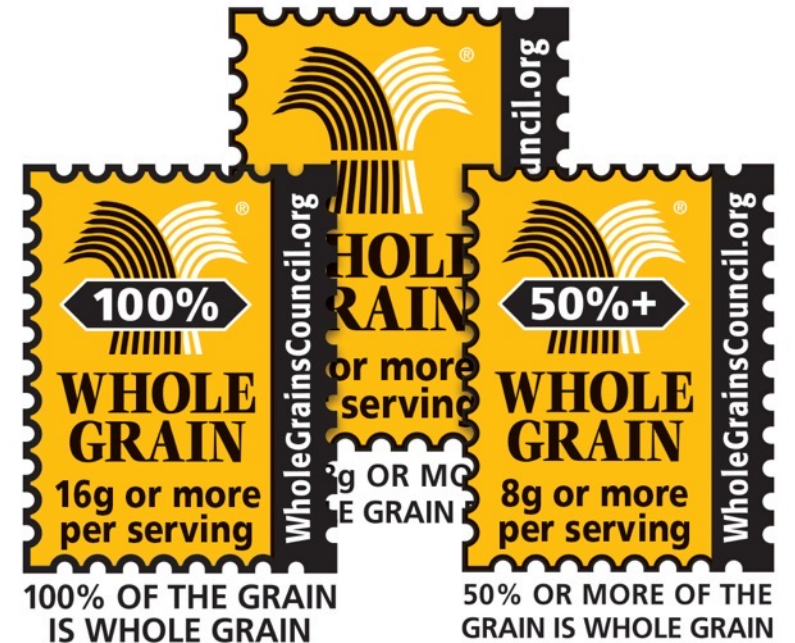
- **Our Vision**
A healthier, happier life through cultural food traditions.
- **Our Mission**
We inspire people to embrace the healthy, sustainable joys of the old ways of eating.
- **Best Known for**
Creating the Mediterranean Diet Pyramid and other Heritage Diet Pyramids, Creating the Whole Grain Stamp, Culinary Travel



About the Oldways Whole Grains Council

Our three-part mission:

- To help consumers find whole grain foods and understand their health benefits
- To help manufacturers and restaurants create delicious whole grain foods
- To help the media write accurate and compelling stories about whole grains



Housekeeping

- Attendees will receive an email within ONE WEEK with **CPEU certificate, slides, and recording**
- Visit **oldwayspt.org/CPEU** to register for upcoming webinars or view recordings of previous webinars
- Please submit any questions using the Q&A function in Zoom
- Thank you to Ardent Mills!

Save the date for our next webinar:

Webinar

Whole Grains & Diabetes:

Reducing the Risk
and Implications to
Healthcare

November 14
3:00 PM E.T.



OLDWAYS



rediscover  goodness
OLDWAYS

Today's Speakers



Matt Schueller
Dir. of Insights and Analytics
Ardent Mills



Laurie Scanlin
Principal Scientist
Ardent Mills

An aerial photograph of a combine harvester working in a vast, golden-brown grain field. The harvester is positioned in the lower-left quadrant, moving towards the right. A large, stylized graphic of a grain stalk, composed of several overlapping curved shapes, is overlaid on the field, extending from the top-left towards the center. The overall scene is bathed in warm, golden light, suggesting a late afternoon or early morning setting.

**Whole grains and ancient grains –
a fit for positive nutrition and
today's consumer trends.**



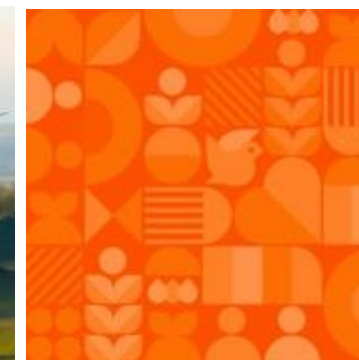
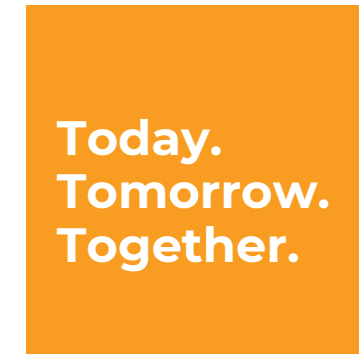
We are Ardent Mills

At Ardent Mills, we're committed to nourishing what's next.

Ardent Mills is working to transform how the world is nourished.

As the premier flour-milling and ingredient company, we cultivate the future of food to help our customers and communities thrive.

We operate more than 40 locations focused on flour, quinoa, chickpeas, pulses, and organic and gluten-free products that drive innovation and ultimately supply nutritious food across North America.



CONSUMER
MINDSETS



Ardent Mills®

CONSUMERS ARE **EMPOWERED** LIKE NEVER BEFORE



Where, what and why they eat is on their terms.



There's a purpose behind the choices.

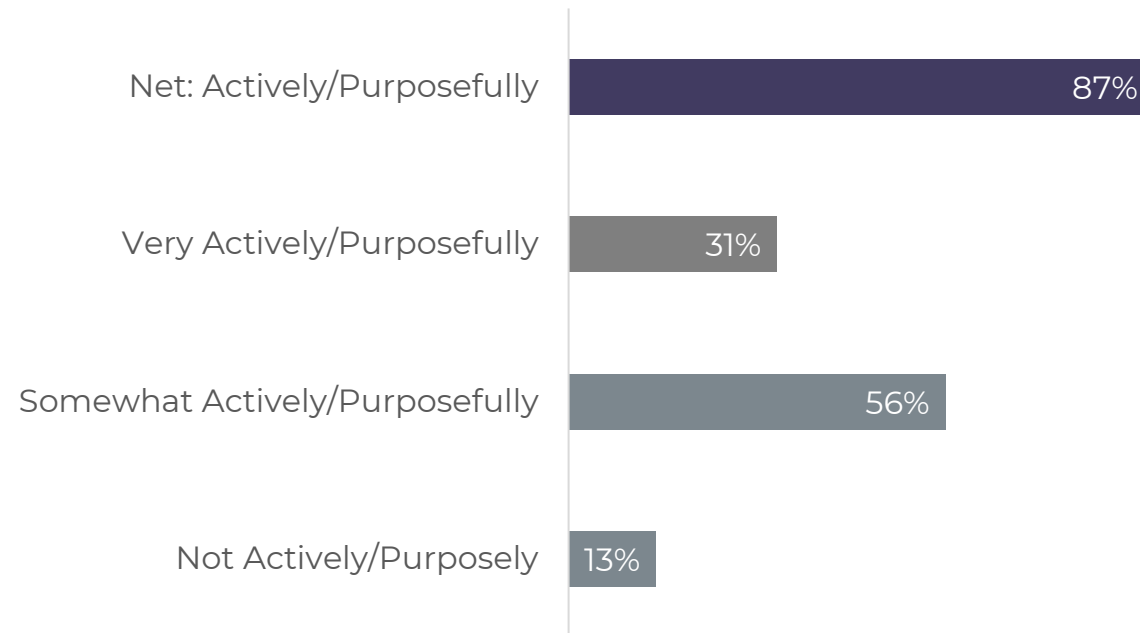


They no longer hope to find food items that meet their interests, they expect to (and are).



Nearly all consumers are taking an active/purposeful approach to eating healthy.

Approach to Choices to Ensure Eating Healthy



Great taste still matters most but intentional health and wellness behaviors play a key role, especially “seeking.”



Importance to Dietary/Eating Goals and Priorities*: % Very Important



Great Tasting Foods



Making Overall
Good/Smart Choices



Seeking
Ingredients/Foods You
Think are Good for You



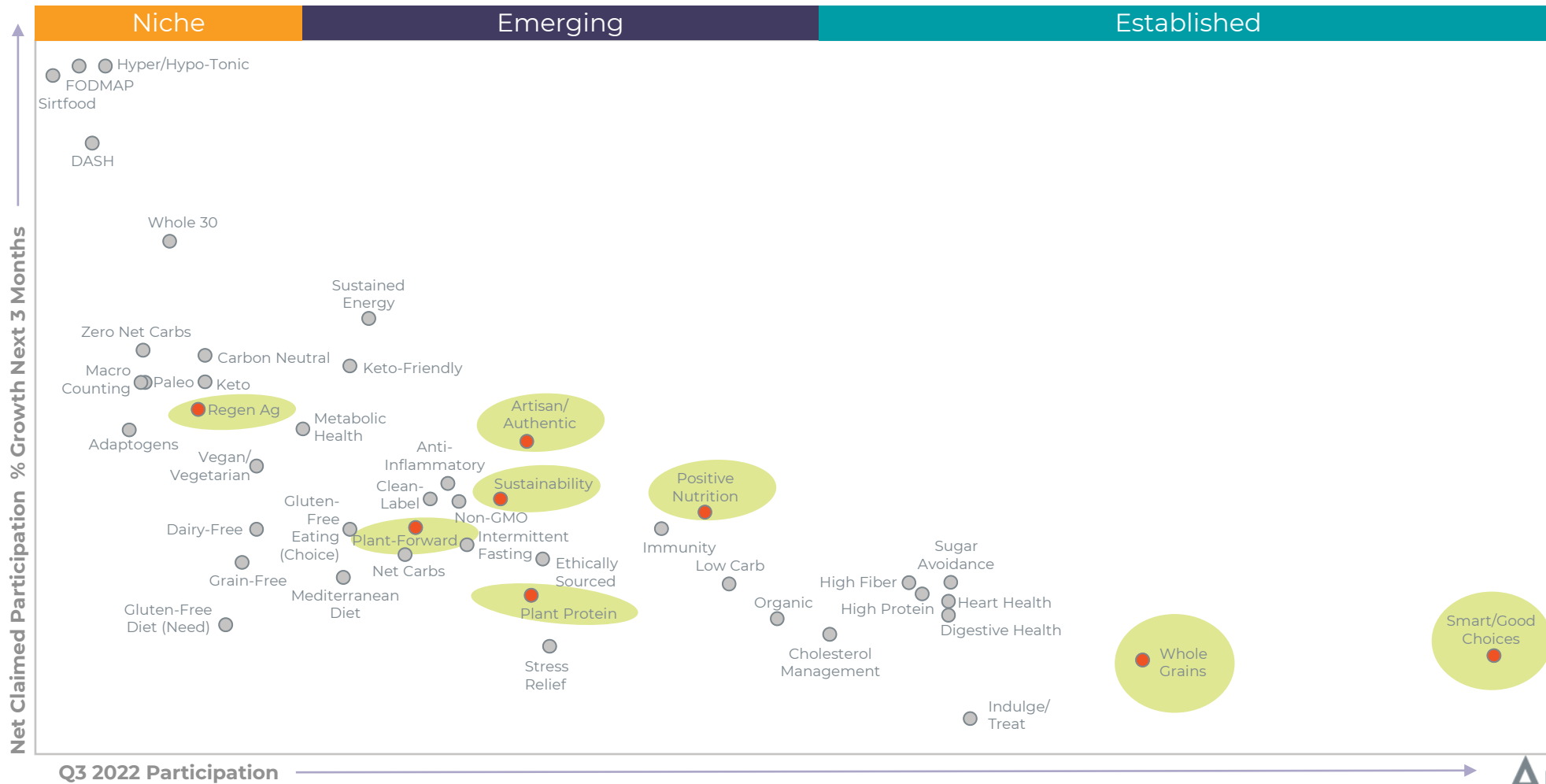
Rich in Vitamins/
Nutrients



Avoiding
Ingredients/Foods You
Think are Bad For You



Most (72%) Consumers are trying new approaches, many are trying multiple approaches.



Behaviors that allow Consumers to seek the positive aspects of foods/ingredients have sizeable (and growing!) participation populations.

<u>Lifecycle</u>	<u>Eating Behavior</u>	<u>Current Claimed Participation</u>	<u>Net Growth in Claimed Participation</u>
Established	Smart Choices	70%	+13%
Established	Whole Grains	53%	+12%
Emerging	Positive Nutrition	32%	+59%
Emerging	Plant Based/Forward	18%	+54%
Emerging	Plant-Protein	24%	+32%
Niche	Sustainably Grown	22%	+63%
Niche	Regenerative Agriculture	8%	+91%
Established	Indulge/Treat – with no concern for wellness/health	45%	-7%



But what about inflation?

Higher prices will certainly have a muting impact **but...**

“Investment” Remains Strong

Consumers are invested in their food choices in ways and to depths that are unique from the past:

- Badging
- Health – reactive
- Wellness – proactive
- Enjoyment
- Social Currency
- Reward
- and more...



32% of consumers plan to buy foods that support their health and wellness goals even if they cost more.

(compared to 13% who plan to cut back due to higher cost).

An Organizing Framework

Five **mindsets** that provide a connection with Consumers **now**, and a path to meet them where they are **headed**.

Functional Foods

Good food. Good health.



Modern Craft

Pushing boundaries.
Staying grounded.



Convenience & Optimized Performance

Efficient practices.
Successful outcomes.



Well & Good

Taste good. Do good.



Sustainable Solutions

Well being.
Being well.



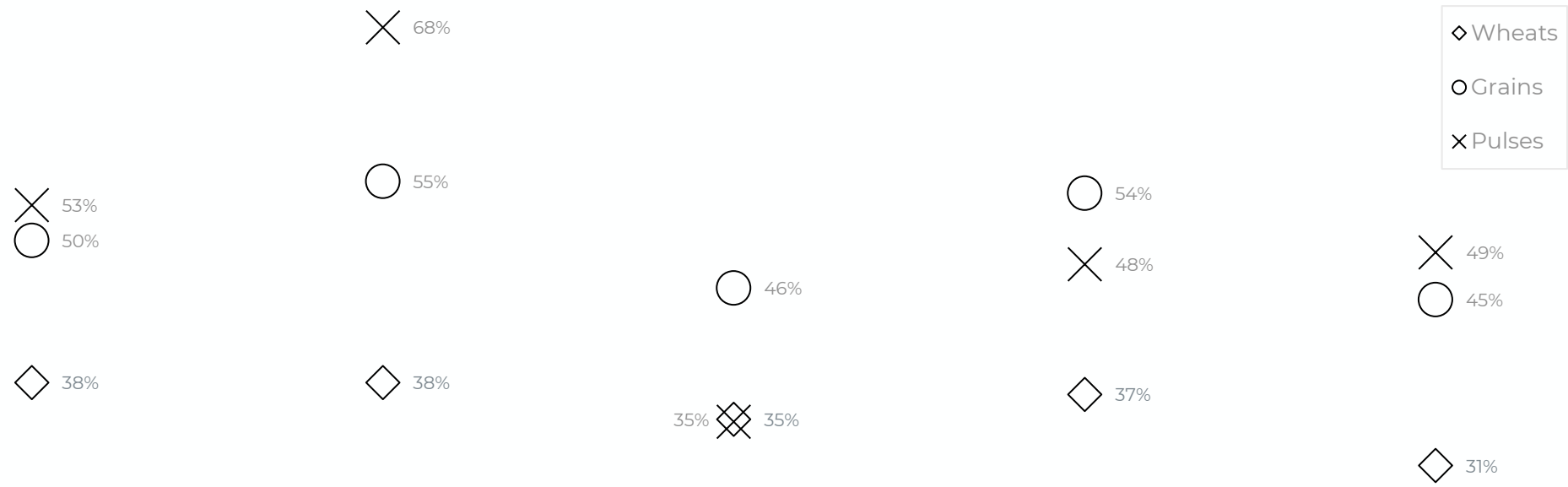
CONSUMERS
AND
GRAINS



Consumers seek out different ingredients when in the respective mindsets.



Net: Consumers Seeking vs Avoiding within Each Mindset



Functional Foods

Well & Good

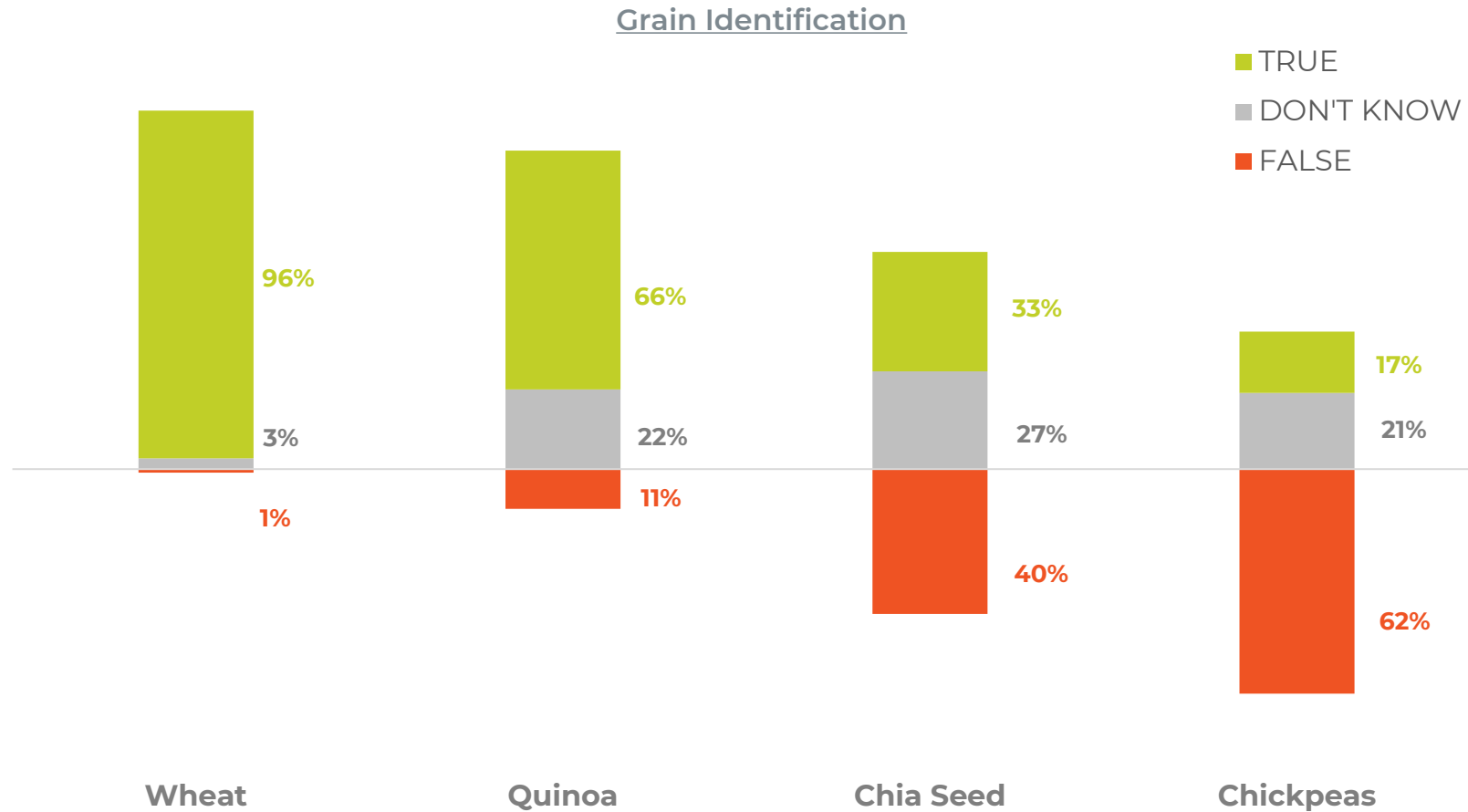
Modern Craft

Sustainable Solutions

Convenience and Optimized Performance



But may need some “help/ education” overall in finding grains of interest.



What are Ancient Grains?

There actually is no “official” definition.

Ardent Mills offers the following (believe it or not – abbreviated) definition:

- A category of grains or pseudo cereal grains that have not been adopted into American staple diets as widely as other grains such as wheat, rice or corn.
- Historically, they were grown and consumed by Indigenous peoples local to their respective regions.
- Ancient Grains have gained popularity due to perceived improved nutritional and flavor profiles.
- Examples of Ancient Grains include Quinoa, Buckwheat, Sorghum, Millet, Spelt and several others.
- **Commonly used/consumed in whole grain form.**

Consumers tend to credit alternative grains on nutritional value, but uncertainty is a defining thought.

Nutritional Value Perceptions*

Ingredient	High Nutritional Value	Medium Nutritional Value	Low Nutritional Value	Do Not Know
Quinoa	58%	26%	2%	14%
Wheat	37%	42%	12%	9%
Amaranth	30%	22%	4%	44%
Buckwheat	29%	40%	6%	26%
Teff	27%	23%	8%	43%
Spelt	22%	28%	5%	45%
Millet	19%	37%	5%	39%
White Sonora	14%	26%	3%	56%
Sorghum	14%	33%	14%	40%

Green = Above Average for the Set

Orange = Below Average



Interest is strong for all aspects of ancient grains, especially the nutritional/functional benefits.

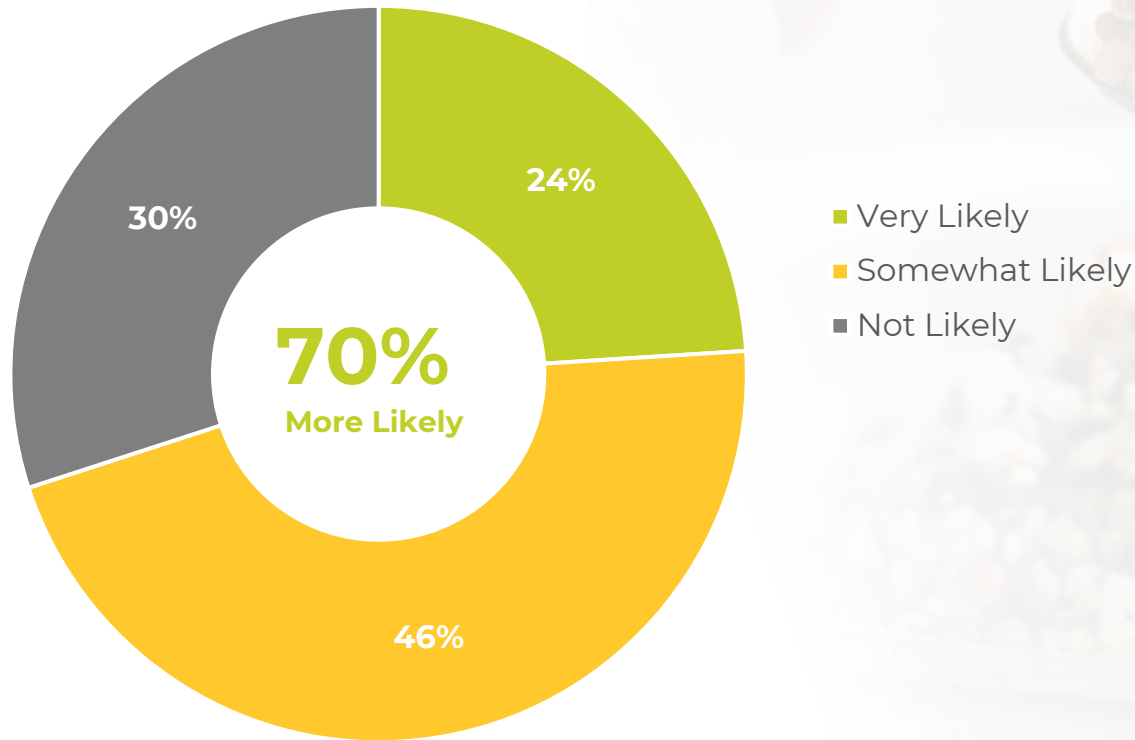
Interest in Ancient Grains

Ancient Grains Characteristics	Net: Interested	Very Interested	Somewhat Interested	Not Interested
Any NUTRITIONAL BENEFITS	85%	50%	35%	15%
Any FUNCTIONAL BENEFITS	82%	45%	37%	18%
EATING EXPERIENCE	81%	40%	41%	19%
What BRANDS make food items that include	80%	36%	44%	20%
Any benefits that the GROWING PROCESS brings to the ENVIRONMENT/PLANET	76%	34%	42%	24%
The STORY/HISTORY	73%	30%	44%	27%
Information about the FARMERS/GROWERS	69%	26%	42%	31%
Characteristics of the GROWING PROCESS for (i.e., organic, regenerative agriculture)	68%	26%	41%	32%
OVERALL	83%	35%	48%	17%



Providing consumers with baseline context about ancient grains yields a strong claimed likelihood of increased consumption.

Future Ancient Grain Consumption Plans



Majority of consumers report positive purchase intent for ancient grain food items.

Positive Purchase Intent for Ancient Grain Food Items

58%
Overall

	Grocery Item	Restaurant Item
Ingredient in a Food Item	61%	56%
Stand-Alone Dish	50%	47%

Future Innovation Concept Idea (1)

Breakfast Bites



On-the-go breakfast bites that are a great way to fuel your morning.
Packs a nutritional punch with ancient grains, fruits, and nuts.



Drivers of Innovation



Functional Foods

Featured Ingredients

- ✓ Ancient Grains Millet & Teff
- ✓ Sustagrain® High Fiber Barley Flakes

Product and Nutritional Highlights

- ✓ Millet and Teff provide visual & textural appeal along with Vitamin A, Vitamin E, Calcium, Manganese
- ✓ Barley provides beta glucan, a soluble fiber that supports heart health*
- ✓ X grams whole grain

21CFR101.81 Soluble fiber from foods such as **whole grain barley, as part of a diet low in saturated fat and cholesterol, may reduce the risk of heart disease. A serving of (Concept) supplies **0.75 grams of the 3 grams of beta-glucan** soluble fiber necessary per day to have this effect.*

Future Innovation Concept Idea (2)

Protein Muffin – powered by plants



An elevated blueberry muffin with plant-based protein.
Make muffins a guilt-free choice that **TASTE GREAT** and are gluten-free.



Drivers of Innovation



Featured Ingredients

- ✓ Ardent Mills Gluten Free All-Purpose Flour
- ✓ Toasted Chickpea and Quinoa Flours

Product and Nutritional Highlights

- ✓ Positive nutrition from plant-based, gluten free, and star ingredients quinoa and chickpea
- ✓ Good source of protein claim per RACC (TBD)

Future Innovation Concept Idea (3)

Organic Rye & Spelt Bread



Organic seasonal hearth bread made from ancient grains rye and spelt is sure satisfy.

54% of consumers would buy a bread made of ancient and heirloom wheats.*



Drivers of Innovation



Featured Ingredients

- ✓ Organic Whole Grain Rye Flour
- ✓ Organic Whole Grain Spelt Flour

Product and Nutritional Highlights

- ✓ 100% whole grain
- ✓ Long fermentation
- ✓ Rich brown crust and crumb color, hint of malt flavor, with European-style bread texture

Future Innovation Concept Idea (4)

Mediterranean Quinoa Salad



Quinoa adds dimension to a zesty stand-alone dish - nutrition, visual and taste-appeal.

56% of consumers recognize quinoa for its protein and fiber.*



Drivers of Innovation



SUSTAINABLE
SOLUTIONS

Featured Ingredients

- ✓ Colorado-grown domestic quinoa

Product and Nutritional Highlights

- ✓ Leading ancient grain with sustainability story
- ✓ 100% whole grain
- ✓ Low in fat, saturated fat and cholesterol

Future Innovation Concept Idea (5)

Plant-Based Bagel Chips



Crunch away with these bagel chips that can be sweet or savory. A plant-based snack that offers positive nutrition with expected convenience.



Drivers of Innovation


Convenience
& OPTIMIZED
PERFORMANCE

Featured Ingredients

- ✓ Chickpea Flour
- ✓ Ultragrain® Flour

Product and Nutritional Highlights

- ✓ Plant-based convenient snack
- ✓ Two flavors: savory vegan parm and cinnamon & brown sugar
- ✓ X grams whole grain

**Questions?
Thank You!**



Ardent Mills.

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