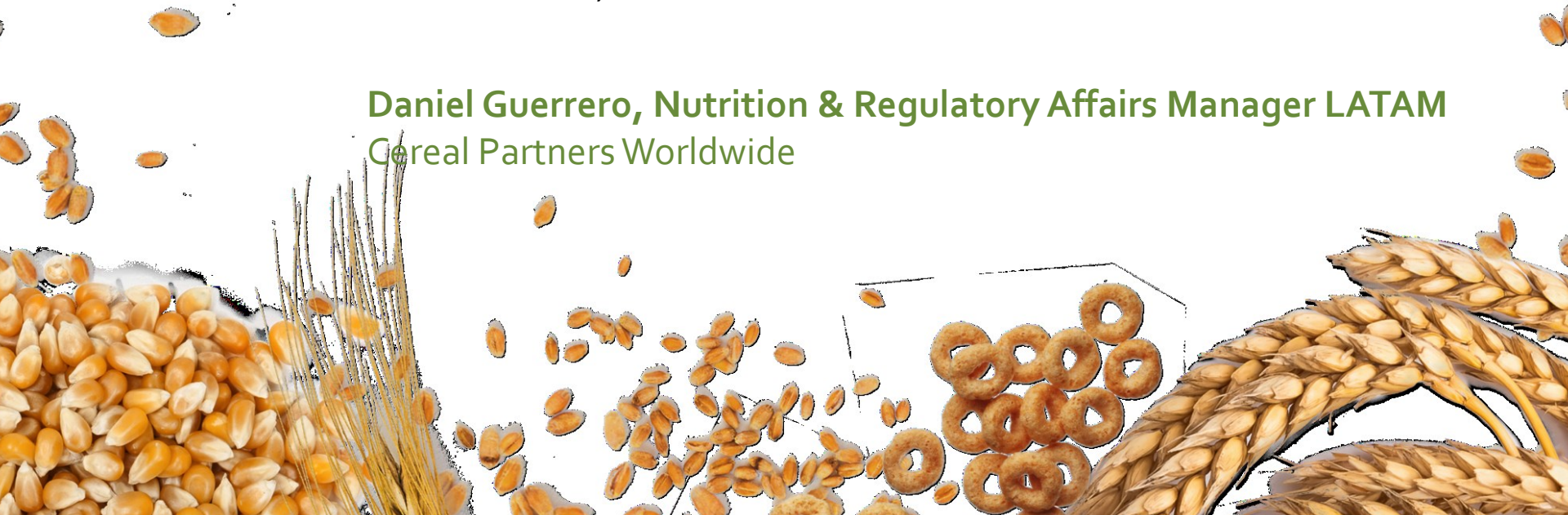


Consumers and WHOLE GRAIN

ATTITUDES TO WHOLE GRAIN FOODS, THEIR BENEFITS AND LIKING: INSIGHTS FROM CONSUMERS IN MEXICO, COLOMBIA AND A GLOBAL PERSPECTIVE

Daniel Guerrero, Nutrition & Regulatory Affairs Manager LATAM
Cereal Partners Worldwide



Who is cereal partners worldwide?

JOINT VENTURE



HQ



ESTABLISHED

1990

WE OPERATE IN

130+
COUNTRIES



MORE THAN

25
years

PROVIDING
NUTRITIOUS
BREAKFAST
CEREALS



We have

4,600
employees

17
factories



4

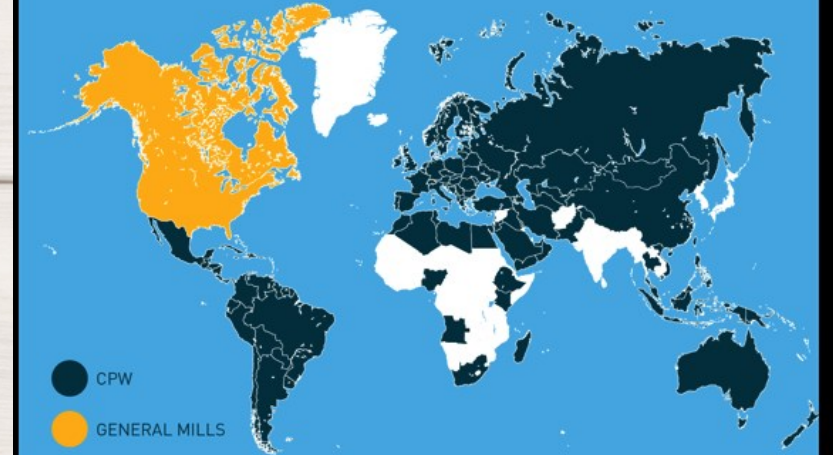
R&D centres



Regional offices:

- London
- Lausanne
- Dubai
- Mexico city

Markets



CPW HAS A BROAD GLOBAL PORTFOLIO OF BREAKFAST CEREALS



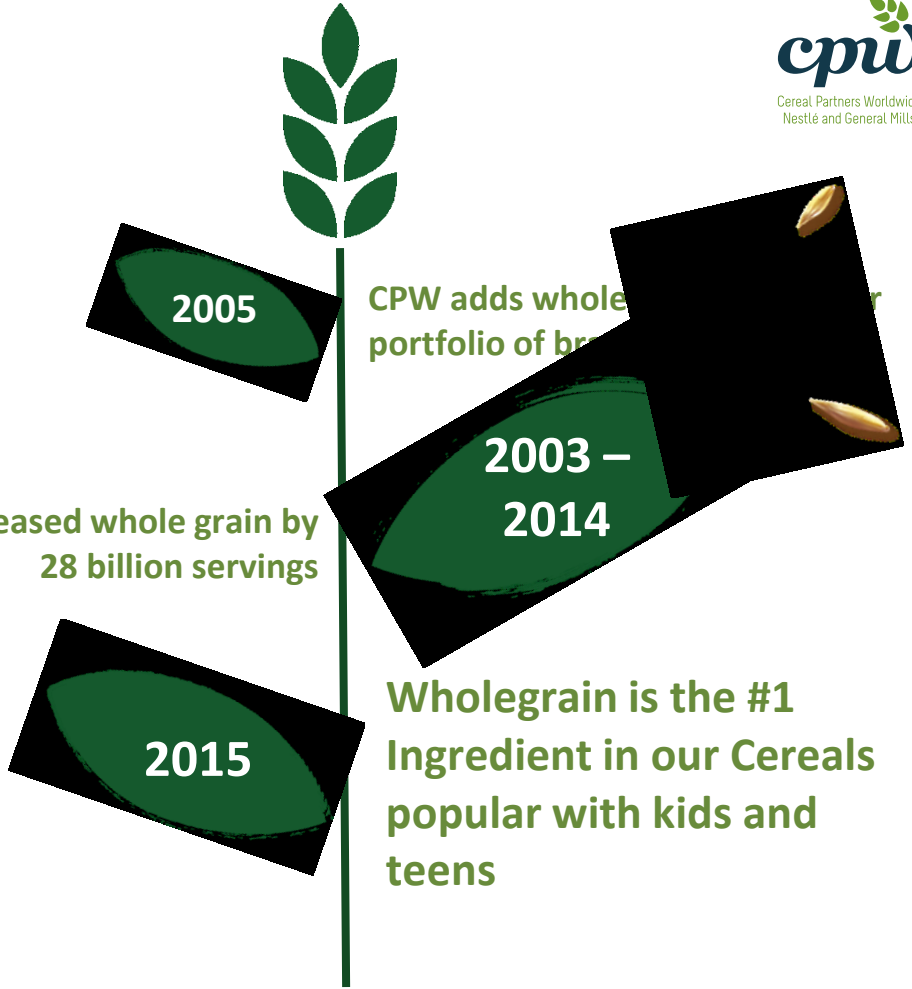
With a diverse variety of breakfast cereals on offer, we have the potential to make a significant positive impact on people's health

CPW Believes in Whole Grain

28 billion
servings of **whole**



Increased whole grain by
28 billion servings



Whole grain is in demand

Across the globe
Consumers tell us they are
seeking whole grain

82%

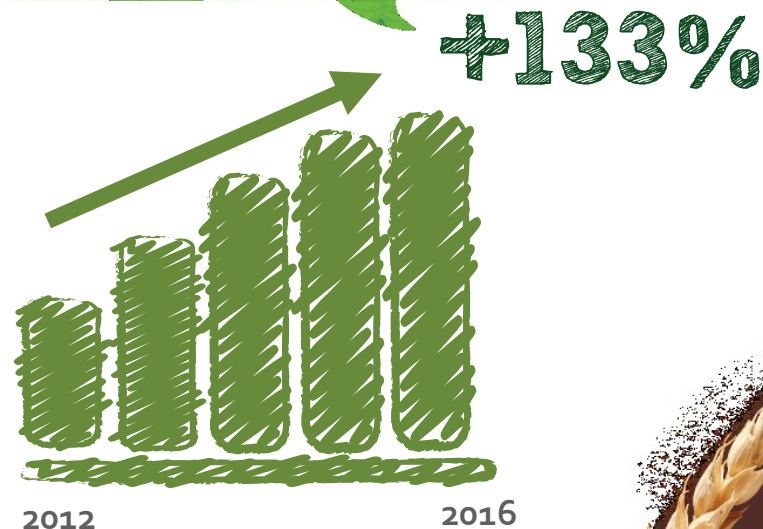
Think it is important for
people to eat whole grain

77%

Report seeking
wholegrain in their diets

Source: CPW Breakfast Survey September 2017 (n=16,000); CPW Ingredients Survey
September 2016 n=1806

There has been a
substantial increase in Global New
Product Launches with Whole grain
Claims since 2012



Source: Mintel Global New Product Database; n=19,451 products
with wholegrain claim launched from 2012 -2016

Many authorities recommend eating whole grains as part of a healthy diet

Examples of the carbohydrate recommendations in dietary guidelines from governments around the world

Public Health England



Eat Plenty of bread, rice, potatoes, pasta and other starchy foods

Choose wholegrain varieties when you can



France, PNNS



Eat bread and starchy foods at every meal

Bread should be preferably whole grain or semi-wholegrain

Mexican Health ministry



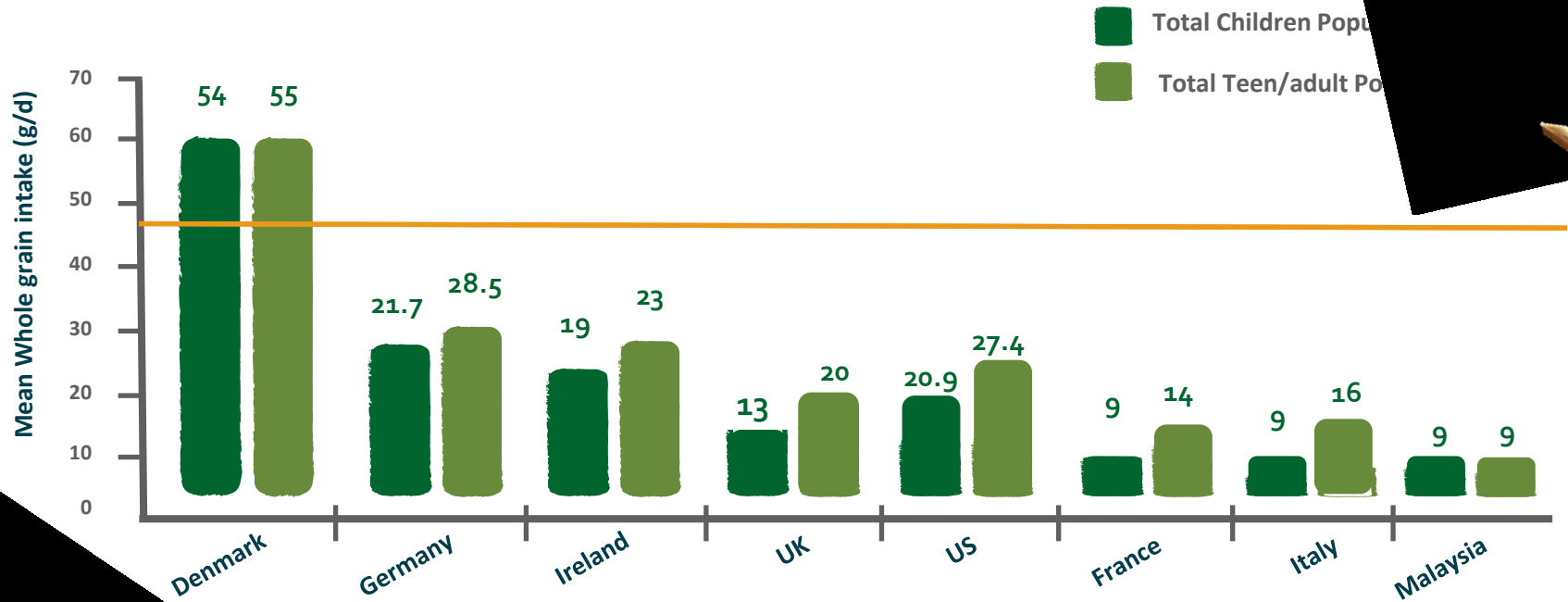
Consumption of cereals should be recommended, preferably whole grains or their derivatives and starchy roots



**However on most cases we lack quantitative recommendations
And also Regulatory definitions on WG and WG Foods**

Yet few people are achieving the US recommendation of 3 servings (48g) whole grain a day

Global overview of the Whole Grain intakes (g/d) in Children & Teenagers



IN 2017 CPW HAS DONE 2 PIECES OF RESEARCH TO LEARN MORE ABOUT THIS QUESTION

Qualitative focus groups



3 countries:



N=72 Mums with Kids aged 6-12y
Mix of cereal and non-cereal users

Fielded: March 2017

Online survey



11 countries:



N=16,000 General Consumers

Fielded: October 2017

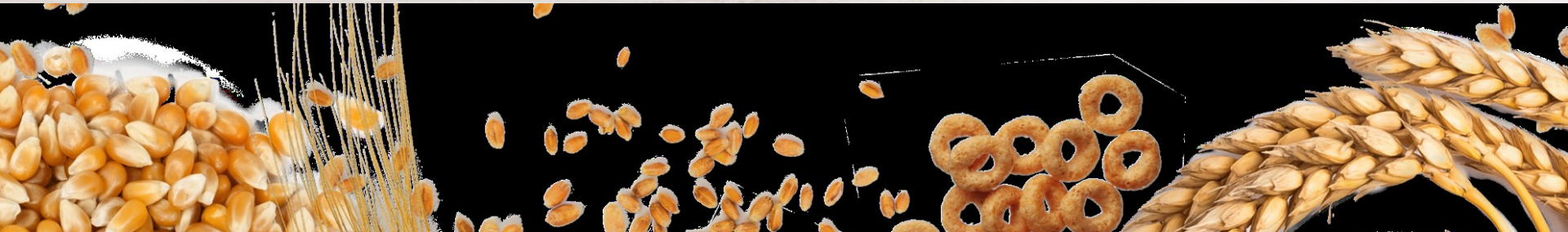
WHY AREN'T CONSUMERS EATING MORE WHOLE GRAIN?

1. **THERE IS CONFUSION identifying WHOLE GRAIN OPTIONS**
2. **They DON'T FULLY UNDERSTAND THE BENEFITS**
3. **They DON'T think IT WILL TASTE GOOD**
4. **They don't know how much they should be eating**



WHY AREN'T CONSUMERS EATING MORE WHOLE GRAIN?

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CONSUMERS INDICATE THAT IDENTIFYING WHOLE GRAIN FOODS IS AN OPPORTUNITY

Why do you think people don't eat more whole grain?



38%

Say people don't know which foods contain whole grain*



38%

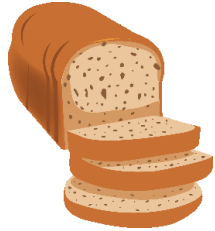


41%

Source: CPW Breakfast Survey September 2017 (n=16,000)

WHOLEGRAIN IS ASSOCIATED WITH A FEW KEY CATEGORIES AND PRIMARILY IDENTIFIED VISUALLY

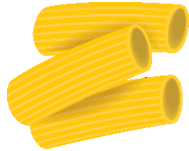
Foods Most Associated with Whole Grain



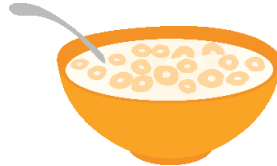
Bread



Rice



Pasta



Breakfast Cereals

Consumers Identify Whole Grain Options Through Visual Cues



Brown Color



Visible Grains



Front of Pack CLAIMS

Confusion in identifying the whole grain option

When asked which of the following ingredients contain whole grain:



Brown Rice

48%



74%



72%



Nuts

21%



37%



29%



Bananas!

10%



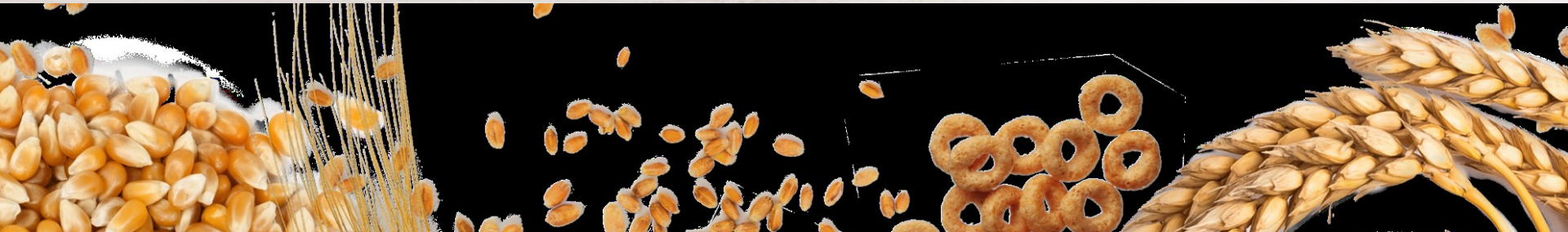
6%



3%

WHY AREN'T CONSUMERS EATING MORE WHOLE GRAIN?

1. THERE IS CONFUSION identifying WHOLE GRAIN OPTIONS
2. They DON'T FULLY UNDERSTAND THE BENEFITS
3. They DON'T think IT WILL TASTE GOOD
4. They don't know how much they should be eating



CONSUMERS DON'T EAT MORE WHOLE GRAIN BECAUSE THEY DON'T UNDERSTAND THE BENEFITS

Why do you think people don't eat more whole grain?



50%

Say people don't understand it's health benefits*



65%



60%

Source: CPW Breakfast Survey September 2017 (n=16,000)

CONSUMERS FREQUENTLY MENTION WHOLE GRAIN IS HEALTHIER AND MORE NATURAL BUT ARE UNSURE WHY

"It's a lot healthier than regular (grain)"

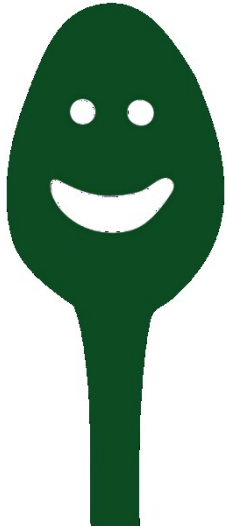
– Mum, Mexico

"Personally I don't have all the information - What is the benefit of wholegrain? I don't really know it is so good"

– Mum, Mexico

"It sounds more natural"

– M



THE MAJORITY OF CONSUMERS ASSOCIATE WHOLE GRAIN WITH DIGESTIVE BENEFITS

High In fiber

65%



75%



69%

Good for digestion

64%



80%



73%

Good for the heart

48%



57%



40%

Helps people lose weight

31%

Reduces risk of type 2 diabetes

18%



14%

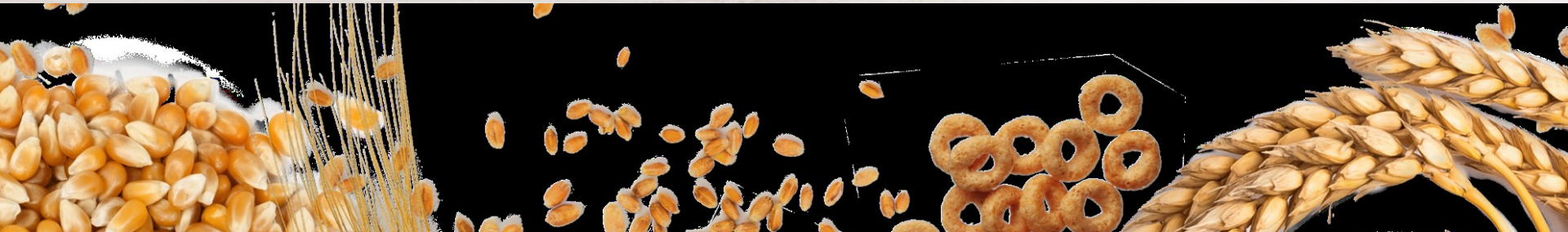


13%



WHY AREN'T CONSUMERS EATING MORE WHOLE GRAIN?

1. THERE IS CONFUSION identifying WHOLE GRAIN OPTIONS
2. They DON'T FULLY UNDERSTAND THE BENEFITS
3. They DON'T think IT WILL TASTE GOOD
4. They don't know how much they should be eating



CONSUMERS DON'T THINK whole grain OPTIONS WILL TASTE GOOD

Why do you think people don't eat more whole grain?



35%

Say who doesn't



33%



37%

CONSUMERS DON'T THINK WHOLE GRAIN OPTIONS WILL TASTE GOOD

"For children they won't eat it because the taste is a bit bad"

– Mum, Malaysia, Malay

"I like the idea of it but the kids won't eat it"

– Mum, UK



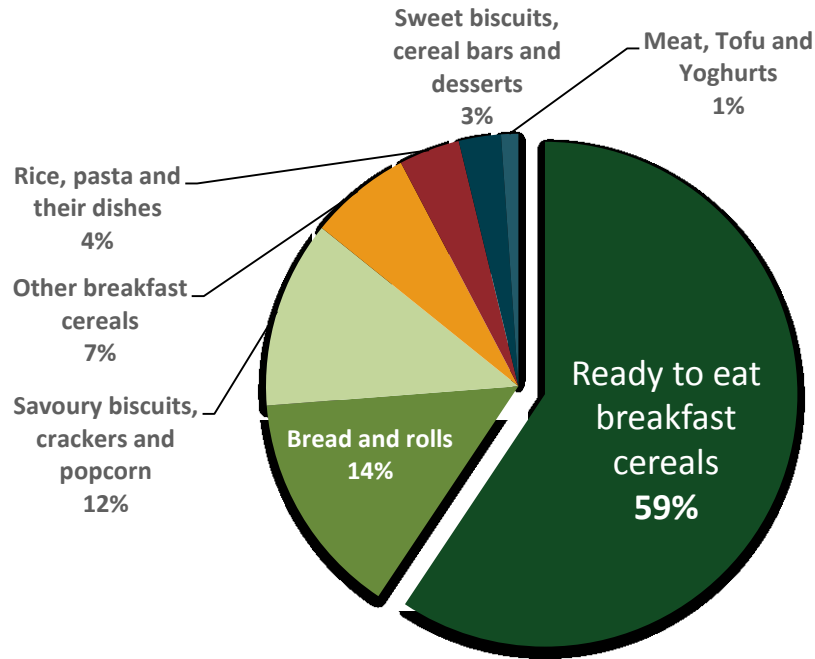
"Whole grain sounds like cardboard box. The flavor is completely different from we grew up with. Makes me it is not very tasty"

– Mum



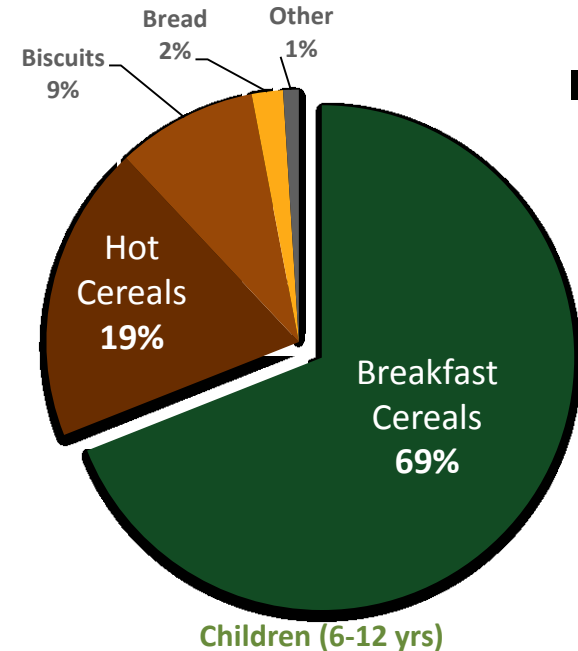
Many foods, even those providing lower levels of wholegrain, can contribute towards daily whole grain intakes

Sources of whole grain among Irish children



Source: Devlin N et al 2013, Children only

Sources of whole grain among Malaysian children



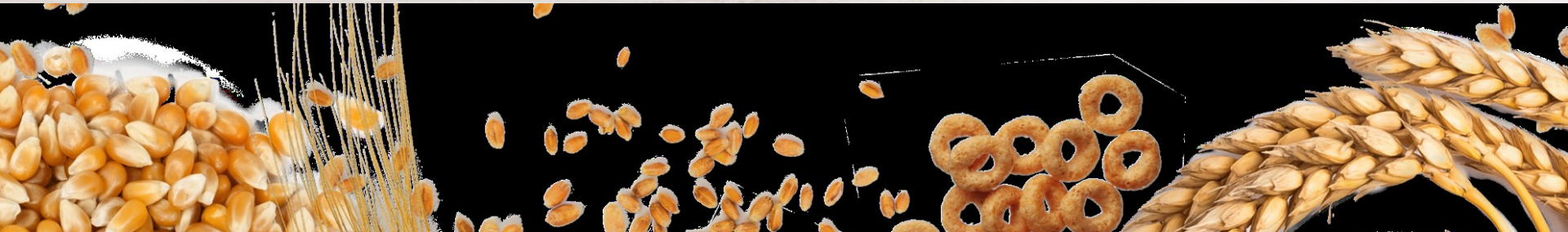
Children (6-12 yrs)

Source: Norimah AK et al 2015, PLoS One.; 10(10): e0138247



WHY AREN'T CONSUMERS EATING MORE WHOLE GRAIN?

1. **THERE IS CONFUSION identifying WHOLE GRAIN OPTIONS**
2. **They DON'T FULLY UNDERSTAND THE BENEFITS**
3. **They DON'T think IT WILL TASTE GOOD**
4. **They don't know how much they should be eating**





CONSUMERS HAVE NO REFERENCE POINT FOR HOW MUCH WHOLE GRAIN THEY SHOULD BE EATING

Do you know how much wholegrain you should eat per day?

"I have no idea."

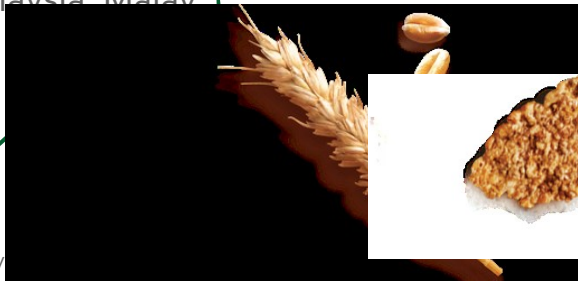
– Mum, UK

"I don't pay attention to how much; its good to choose (wholegrain) when we can but I don't focus on it..."

– Mum, Mexico

"You can eat every day and there are no problems with it"

– Mum, Malaysia, Malay



CONSUMERS EITHER DON'T KNOW OR UNDERESTIMATE HOW MUCH WHOLE GRAIN THEY SHOULD BE EATING



33%

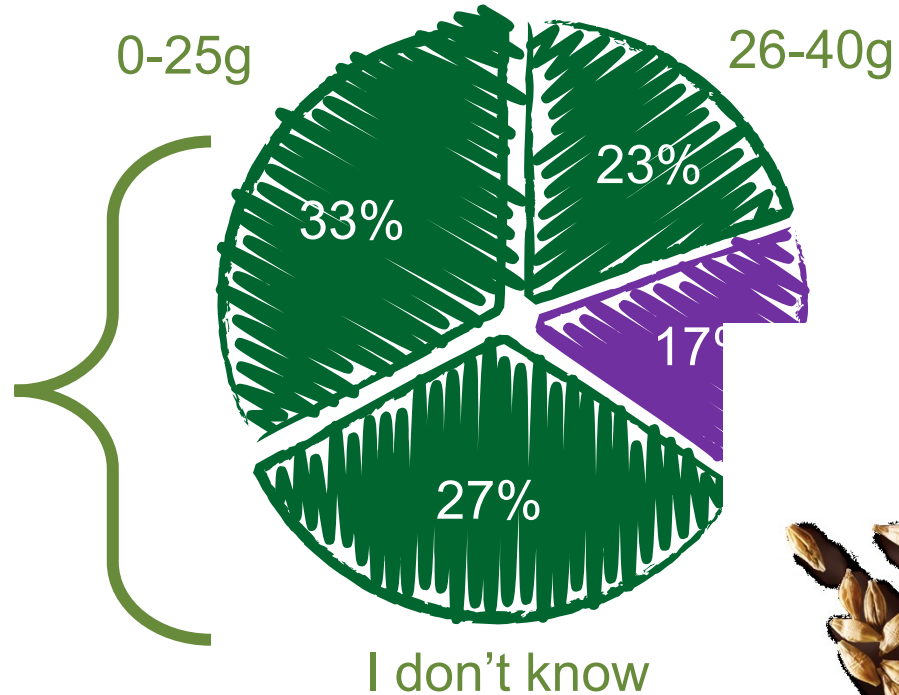
don't know or chose
less than the recommended
amount (41+g) per day



80%



78%



Conclusion and recommendations

Help consumers identify which foods contain whole grain

- Create consistent labeling of wholegrain options through minimum standards
- Guides product development and ensures a level playing field for all

Educate on the benefits of whole grain

- Help them understand *why* they should be selecting whole grain foods

Provide reassurance on the taste of whole grain options

- Find interesting ways to integrate whole grains into the diet
- Incentivize industry to increase the variety of options

Help them understand how much they should be eating

- Develop a quantitative recommendation on wholegrain intake
- Logos could provide helpful guidance on how much whole grain is in a food item





VIENNA WHOLE GRAIN DECLARATION
- A Call to Action for Increasing Whole Grain Intake

**4 goals to drive WG
acceptance, product
availability and
appropriate
communication and
education programs.**

1.- Definitions

2.- Intake Recommendation

3.- Sustainability

4.- Promotion and Education

The background is a dark, horizontal-grained wood texture. Overlaid on this are several rectangular and irregular white and black boxes. Inside these boxes are images of wheat: some show individual golden-brown grains, some show small clusters, and others show stalks of wheat with their awns. The central text 'QUESTIONS?' is in a white, sans-serif font, centered within a large dark wood rectangle.

QUESTIONS?



APPENDIX

WHOLEGRAIN IS IN DEMAND: Country Specific Breakout

82%

of total consumers think it is important
for people to eat whole grain

Above Average

Mexico



96%

UAE



90%

Average

Saudi



82%

Below Average

Denmark



77%

Finland



73%

Malaysia



88%

Columbia



88%

Turkey



87%

Sweden



71%

UK



70%

Norway



70%

PEOPLE DON'T KNOW WHAT FOODS CONTAIN WHOLEGRAIN:

Country Specific Breakout

38%

of total consumers say people don't eat more wholegrain because: they don't know which foods contain whole grain

Above Average

Turkey



49%

Norway



43%

Mexico



41%

Average

UAE



39%

Columbia



38%

Saudi



38%

Sweden



36%

Below Average

UK



35%

Denmark



34%

Malaysia



34%

Finland



26%

FOOD CONFUSION – BROWN RICE

48% of total consumers identify Brown Rice as a food that contains wholegrain

Above Average

Columbia



74%

Mexico



72%

UAE



51%

Average

Malaysia



50%

UK



49%

Below Average

Saudi



40%

Sweden



35%

Finland



34%

Turkey



32%

Denmark



32%

Norway



28%

FOOD CONFUSION – NUTS

21%

of total consumers identify Nuts as a food that contains wholegrain

Above Average



37%



29%



26%



25%



24%

Average

Below Average



14%



13%



13%



12%



9%



9%

FOOD CONFUSION – BANANA

10%

of total consumers identify Bananas
as a food that contains wholegrain

Above Average

Malaysia



20%

Saudi



18%

UAE



18%

Average

Denmark



9%

Finland



9%

Turkey



9%

Sweden



9%

Below Average

Norway



7%

UK



7%

Mexico



6%

Columbia



3%

PEOPLE DON'T UNDERSTAND BENEFITS OF WHOLEGRAIN: Country Specific Breakout

50%

of total consumers say people don't eat more wholegrain because:
they don't understand it's health benefits

Above Average

Columbia



65%

Mexico



60%

Malaysia



54%

Turkey



52%

Average

UAE



51%

Saudi



50%

Below Average

Sweden



40%

Finland



40%

Norway



38%

UK



38%

Denmark



36%

IT DOESN'T TASTE GOOD: Country Specific Breakout

35%

of total consumers say people don't eat more wholegrain because:
doesn't taste good

Above Average

Malaysia



55%

UAE



40%

Average

Sweden



40%

Columbia



37%

Mexico



33%

Turkey



33%

Below Average

Norway



30%

Saudi



29%

UK



29%

Finland



29%

Denmark



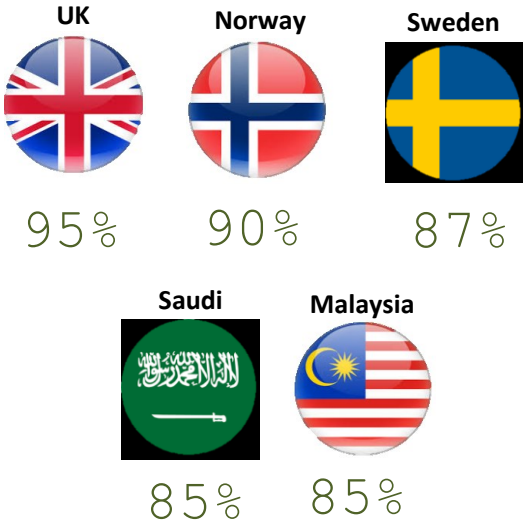
28%

AMOUNT: Country Specific Breakout

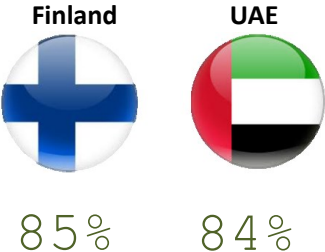
83%

of total consumers either chose 'I don't know' or less than the recommended amount (48g) per day

Above Average



Average



Below Average

