

Why gluten-free?

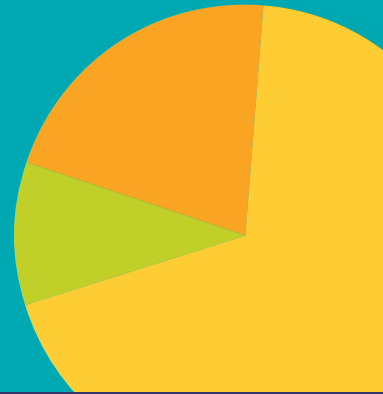


44% of consumers eat gluten-free at least some of the time¹



What's driving interest in gluten-free?¹

- ◆ 69% out of choice
- ◆ 21% for another reason
- ◆ 10% out of medical need



Growing market for gluten-free

\$811 Million
The total gluten-free food market in Canada²



9.1% CAGR Projected growth from 2020–2025²

33%  of Canadians are looking for gluten-free foods²

Gluten-free pizza is on the menu

Popular pizza crusts by % of menu appearance³

Thin crust	19.3%	Pan	5.4%
Gluten-free	17.5%	Thick	4.2%
Flatbread	13.9%		



17.5%

of restaurants menuing pizza, offer a gluten-free pizza option⁴



Also, gluten-free is the fastest growing crust in Canada
+63% over the last 4 years⁴ 

Six leading types of specialty pizzas⁵

- ◆ Vegetarian
- ◆ Plant-based
- ◆ Gluten-free
- ◆ Keto-friendly
- ◆ Organic
- ◆ Flatbread



¹ Ardent Mills Proprietary Study
² Canadian Celiac Association
³ MenuTrends Canada 2020
⁴ Datassentials Menu Mentions
⁵ Technomic