



TrendToTable™

# The food trends driving today's consumer purchases

and their impact on grains, pulses and flours



Ardent Mills®



# Today's complex foodscape

## How to meet consumers along their food purchasing journey

There has never been a better time to understand the complexities of consumer food purchasing motivations, where grains, flours and pulses<sup>1</sup> fit into these decisions and how to deliver on these evolving needs.

We recently surveyed more than **10,000 U.S. consumers**, and we combined those findings with industry market data and macro-societal trends for a comprehensive look at the **foods they love, why they love them, what they can't live without—and what information they need to help make their decisions.**

This large-scale, quantitative study provides a nationally representative sample of consumers ages 18+, primary or shared decision makers for food sourcing both at- and away-from-home—with an underlying focus on grain-based foods.

**Trend to Table™** helps cut through the noise with our research findings that bring you **five trends motivating consumer purchases and the practical ways grains can help you create and innovate the foods** today's customers want. Grains, flours and pulses are naturally flexible and versatile, and they can fulfill each one of the five major trends driving consumers along the purchasing path.

<sup>1</sup> Chickpeas, lentils, dry peas and dry beans

### The ever-changing paths to purchase

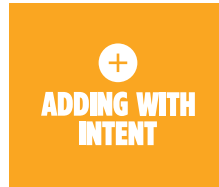
Matt Schueller, marketing insights and analytics director at Ardent Mills, explains that while the trends might communicate a complex consumer mindset, it's really a time where consumers are embracing many things—and it's not a one-size-fits-all purchasing path.

**“It's very much a time of opportunity.”**

**Matt Schueller, Marketing Insights and Analytics Director at Ardent Mills**



# Here are the top 5 trends driving consumer purchasing decisions



## Good news for grains

Today's U.S. consumers have moved beyond simply understanding grains—they've developed a true appreciation for them. Encouragingly, grain positivity is high with the younger demographic of 18-34 year olds. They are foundationally and passionately connected to grains.

**59%** of those surveyed agree that grains are "the cornerstone of the American food landscape"

**44%** also state that a good meal is not "complete" without a grain-based food such as bread, pasta, etc.

About half of U.S. consumers report that inclusion of grains is something they seek out when ordering at restaurants or preparing foods at home; for younger consumers, this is even more important.

Grains also hit the mark as food prices have risen and continue to be on the rise. A total of 52% surveyed state they're an affordable way to eat nutritiously. Beyond their universal understanding and appreciation, U.S. consumers are looking for details to support their decision making: 41% want to know more about grains, and 43% say they'd eat more grains if they had additional information about them.

## What grains are trending now

Quinoa, sorghum and buckwheat are all gaining traction with the younger demographic, and 47% of all U.S. consumers surveyed say they try to learn about different grains so they can incorporate them into their diets, behavior that is driven by consumers ages 18-34 (54%).

## The trends speak for themselves

U.S. consumers ages 18-24 years of age are incredibly interested in trending grains, and they consistently work them into their diets:

### Quinoa

85% Awareness

51% Familiarity

### Sorghum

67% Awareness

51% Familiarity

### Buckwheat

85% Awareness

48% Familiarity

### Wheat Flour

98% Awareness

79% Familiarity

### Grains (any)

98% Awareness

91% Familiarity

### Millet

70% Awareness

36% Familiarity

### Teff

32% Awareness

17% Fam.



# Ingredients Matter



## Building food choices from the ground up

### Selecting the right foods starts with ingredients

Consumers are often making their food decisions with ingredients as the primary decision-making factor. In fact, nearly all (85%) of the consumers surveyed report that ingredients play a role in their food selections.



“Many consumers today start by seeking out specific ingredients on the benefits they deliver and the sourcing and processing methods—and then they look for the products that match,”

Lindsey Morgan, Senior Director of Product Marketing and Innovation at Ardent Mills



# Ingredients Matter

Three-quarters (75%) of consumers who review product information check the ingredients list specifically. Similarly, the “right” or desired ingredients can command higher prices—more than half (58%) of consumers agree that they are willing to pay more for foods that use whole and/or less-processed ingredients.

This means alternative grains are experiencing growth, and pasta is an especially popular dish in U.S. consumers' homes—77% of all those surveyed consume pasta at least a few times per month at home, and trending pastas like whole grain and chickpea are now a favored choice.



## Grains matter

The specific grains included in finished products are given majority consideration when consumers buy specific products.





# HERITAGE IS HERO



## Food journeys: honoring the past and seeking adventure in the present and future

### Familiar favorites will always endure, but there is an eagerness to explore

The benefits of food extend beyond the ingredients and eating experience—while consumers agree their choices are influenced by the dishes they grew up with, those enduring flavors also inspire a desire for culinary exploration.

More than half of those surveyed (52%) who like trying new foods also look for foods with grains, which is 17% higher than the national average.

Planned grain consumption is high among U.S. consumers, with about 46% of those surveyed planning to eat more grains in the next year, led by African Americans at 60% and followed by Latine at 51%.

Overall, U.S. consumers in general are nurturing their culinary roots and ancestral cooking practices, but they are also embracing their sense of adventure by exploring new cultural cuisines.







# HERITAGE IS HERO



## Celebrating heritage

**51%** of consumers agree food is part of their identity

**63%** state that their upbringing influences what they eat

These findings are even stronger with consumers 18-34 years old.

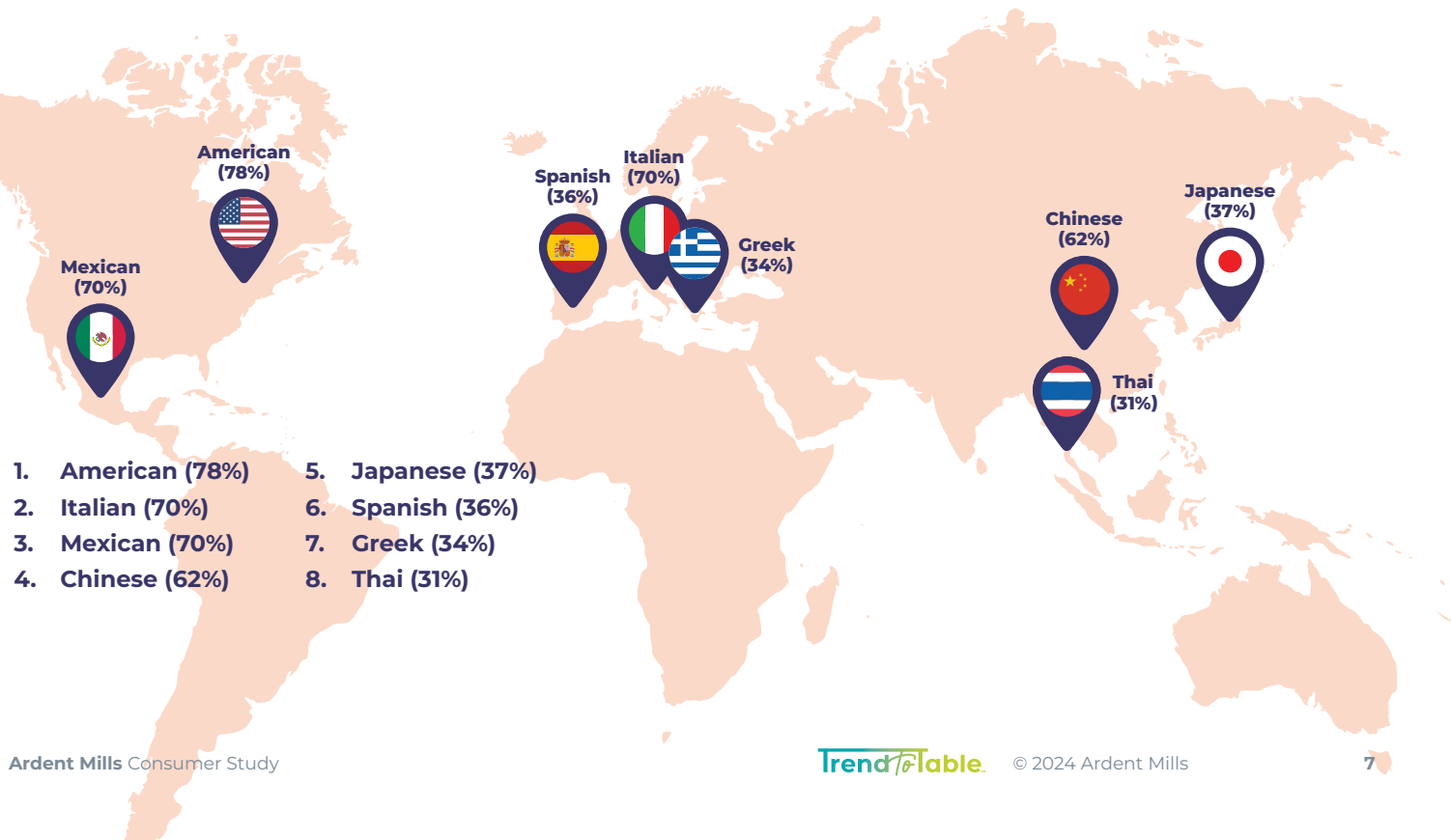
“Consumers are using food choices to define who they are today. There’s an opportunity in the tension between the familiarity and the unknown elements of the future,” says Morgan.

They also think about foods as a means to how the outside world, peers and family perceive them. Between these and personal identity, it’s all about striking the right balance to meet consumers at their many stops throughout this journey.

**“There are those familiar foods that have enduring meaning, but those flavors also inspire a wanderlust—and consumers are ready to experiment with new cultural cuisines.”**

Lindsey Morgan

## The top cuisines U.S. consumers enjoy



1. American (78%)
2. Italian (70%)
3. Mexican (70%)
4. Chinese (62%)
5. Japanese (37%)
6. Spanish (36%)
7. Greek (34%)
8. Thai (31%)

# ADDING WITH INTENT



## Intentional inclusion

### Consumers are curating their food choices based on the benefits

Seeking foods that add to and boost wellness goals is a top priority for today's consumers who are more focused on mindful dietary decisions that will benefit their health and wellness, with restrictive practices taking a backseat.

It sounds simple, but it's true: consumers just want to feel good about their food choices by adding nutritional elements and favorable taste to their selections.

Schueller explains that these personal dietary goals are now more motivated by positive aspects rather than the removal or avoidance mindsets of the past. In fact, the vast majority (80%) agree that seeking out "good for you" foods is a top priority to meeting their dietary goals.





# ADDING WITH INTENT

**“Today’s consumers don’t want to restrict as much as add in the foods and ingredients that fulfill their wellness goals, and investment in food is at an all-time high.”**

Matt Schueller

Additionally, grains deserve to receive credit for adding multiple benefits to dishes—half of those surveyed (52%) say that grain-based foods (such as bread, pasta and pizza) are an affordable way to eat nutritiously and incorporate those “good-for-you” benefits they seek, and 57% say grains support the finished products’ alignment to dietary goals. Three-quarters (75%) agree that grains are “good for my body.”

Schueller explains that today’s consumers take an experimentative approach when it comes to their product selections.

“It’s more of a trial and error,” says Schueller. “People are giving one food or ingredient a try, and if it works out, great! If it doesn’t, then they’re on to the next item.”

The good news is that this purchasing fluidity presents an opportunity to meet consumers’ flexible and ever-changing exploration. Through product innovations, there is a vast array of ways to offer the right selection to meet the consumers in their fluid solution states.





# DESIRE TO DO GOOD



## Steering toward sustainability: guidance for products and practices

### Information can help close the gap

The lack of information often leads to confusion surrounding topics of sustainability and regenerative agriculture—and what consumers should be expected to pay for these benefits. This makes it difficult to select the foods that align with their sustainability goals.

**!** **57% of consumers** want more information on how their food choices positively impact the planet

While many consumers say they are ready to choose foods that help the planet, they need more details to connect with their goals and help drive the final decisions. This is even more evident in households with children and those living in the western U.S.

“The sustainability movement is driven by earnestness and an awakening to what the implications are for the future,” explains Morgan. “They’re starting to see the bigger picture when it comes to not just their own health, but the planet.”







## DESIRE TO DO GOOD

**49% claim** that foods grown using sustainable or regenerative agriculture practices are important to their dietary goals and priorities

**41% say** that foods with a lower carbon footprint are important to those same goals

“Behaviors are starting to follow at scale, with nearly half (47%) agreeing they seek foods that are not only good for them but good for the planet—grown and processed with fair treatment of all workers in the supply chain.”

Matt Schueller

### Intentional selections:

**53% agree** that their food choices can have a positive impact on the planet



**Nearly half (43%)** agree that grains generally have a lower carbon footprint than other types of foods.



Ingredient suppliers and manufacturers that incorporate sustainable practices provide tangible ways to connect with consumers and help them feel like they're making a difference. Product features such as regenerative agriculture, organic ingredients and sustainability can command higher prices, often more so with the younger demographic and households with children.





Indulge me

## Consumers are embracing indulgence

### No trade-offs, and no compromises

Great taste has moved from expectation to requirement. Nearly three-quarters (68%) of consumers indicate that regular indulgent moments are important to their dietary/eating goals and priorities, whether it's connecting to nostalgia, celebrating a special event or just working small moments of joy into their days. From sweet foods to savory dishes, consumers are confidently indulging in their daily lives.

### Food makes people happy



**92%** state that "great tasting foods" are a key element to their dietary goals

### Apology-free eating



**68%** report that "rewarding and treating" is a top dietary priority







# Indulge me

“They are unapologetic and happy before, during and after a great eating experience,” says Morgan. “There are no concessions, no math and no compromising or trade-offs—no hesitance or reluctance.”

## Consumers report feeling these top 4 feelings after eating homemade sweet baked goods:



## Two-thirds of consumers

agree that “baking from scratch” is a way to show someone you care



There's room at the table for savory indulgences, too. Pizza has a top position in the foodscape, with nearly half of all consumers (48%) eating restaurant pizza a few times a month or more, and 55% declaring that “pizza is America's national food.” 🇺🇸🇺🇸



**“Today's consumers proactively seek out indulgent eating occasions because they make them feel good, both physically and mentally. If the main benefit that you leave your consumer with is happiness, that's a great place to be.”**

Matt Schueller

# Trend To Table™

## Inspired? Want to know more?

We're just getting started

The top five trends are not compartmentalized. They are fluid, and consumers are navigating each of the trends by the day, meal—even within a single meal. The more trends you can innovate around, the more traction you can gain in the marketplace.

At Ardent Mills, we are your partner in grains, pulses and flours, as they remain a foundation of the American food landscape—and they provide versatile opportunities to deliver on today's trends.

If you're ready to learn more about how to meet these trends, **Trend to Table™** is only the beginning. We're here to help you make the most of these insights, provide the ability to dive deeper and connect the dots so you can innovate, create and grow.

Explore our [Insights page](#) for additional proprietary research to propel your products and innovation goals, and reach out to connect.



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Matter**



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All data points are derived from Ardent Mills Proprietary Research, U.S. Consumers 18+, 2023