“Tell Me What They Want!”
Nutrition Trends and Today’s Consumer

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“I can teach anybody how to get what they want out of life. The problem is that I can't find anybody who can tell me what they want.”

-Mark Twain
Six Top Trends

• Consumer Barriers to Living a Healthier Lifestyle
• Consumers Re-examining Values
• Dietary Guidance
• Product Improvement
• Whole Grain and Cereal
• The Modern Food Supply & Packaged Foods
The Consumer Landscape

**HEALTH**
- Love to Eat Healthy
- Need to Eat Healthy
- Should Eat Healthy

**TASTE**
- Health Not a Top Concern
- Family Time a Top Concern
- Wish to Eat Healthy

**CONVENIENCE**
- Sometimes Eat Healthy Anyway
- Wish to Eat Healthy

*2010 Data*
84% of American consumers have a desire to live a healthier lifestyle, yet...

Consumers Lack Time
- 55% say they don’t have enough time
- 26% say that cooking is a chore

Consumers Lack Will-Power
- 59% say they don’t have the will power
- 49% are overwhelmed by the number of changes

Consumers Have Money Concerns
- 57% of consumers say they don’t have enough money

Consumers Lack of Nutrition Knowledge
- 46% of consumers feel that food & health information is confusing

*data from BIC, 2011*
Top Three Ways Consumers are Re-examining their Values

**Need to Splurge Sometimes**
- Little pleasures make the sacrifices bearable

**Things Money Can’t Buy**
- Strong relationships don’t cost money

**Drawing a Line in the Sand**
- Everyone has something they will never give up
Consumer Level of Concern for Key Limiters

“A person should be very cautious in serving foods with …”
Percent of Respondents that Completely Agree with the Statement:

Source: National Eating Trends® Nutrition Survey, years ending Feb
According to the Dietary Guidelines 2010, Americans fall short on key nutrients & foods:

- Calcium
- Vitamin D
- Potassium
- Fiber
- Whole Grains
- Dairy
- Fruits & Vegetables
2010 Dietary Guidelines for Americans

- 23 Key Recommendations for the general population
- Balance calories with physical activity
- Consume more healthy foods (veg, fruits, whole grains, low-fat dairy, seafood)
- Consume less sodium, sat & trans fats, added sugars, refined grains
- Consumer-friendly tools and advice to be shared by USDA/HHS in coming months
- Call to action among all public sectors
Continuous Health Improvement

Cumulative* Achievement of GMI Sales Improved FY05-FY11 & F12-F16 Projection

Over 600 products improved FY05-FY11

- FY05: 16%
- FY06: 21%
- FY07: 33%
- FY08: 40%
- FY09: 45%
- FY10: 60%
- FY11: 64%
- FY12 projected: 67%
- FY16 projected: 80%

*On a cumulative basis: products that have been nutritionally improved more than once are counted only one time

Key Drivers Nutritional Improvement FY05-FY11

- Decreasing Limiters 66%
- Increasing Positives 34%

Focused on doing the right thing to make our products nutritionally better

- Calorie/portion control 5%
- Gluten 2%
- Sodium 32%
- Sugar 4%
- Total fat/saturated fat 2%
- Vitamins/minerals 11%
- Fiber 5%
- Whole grain 17%
- Trans fat 20%
- Other* 2%

*includes: serving veg/fruit, antioxidants, probiotic, protein, omega-3, GMI Better-for-You

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General Mills Sodium Reduction Commitment

GOAL:
Top 10 product categories target 20% reduction in sodium by 2015

- Canned Vegetables
- Cereals
- Dry Dinners
- Frozen Pizza
- Mexican Dinners
- Refrigerated Dough Products
- Savory Snacks
- Sides
- Soups
- Variety Baking Mixes

>400 products will be reformulated
Reducing Sugar in Cereal

Commitment to further reduce sugar level

<table>
<thead>
<tr>
<th>Year</th>
<th>Sugar Level</th>
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<tbody>
<tr>
<td>2007</td>
<td>13g</td>
</tr>
<tr>
<td>2008</td>
<td>12g</td>
</tr>
<tr>
<td>2009</td>
<td>11g</td>
</tr>
<tr>
<td>2010</td>
<td>10g</td>
</tr>
</tbody>
</table>

Goal: ≤9g
...but Health Innovation is Challenging

Deliver meaningful consumer health benefits with no taste trade-off AND affordability
Keys to Success in Product Improvement

Research
- Understand impact on diet & role of individual foods
- Authoritative nutrition guidance— informs product development

Stealth Health
- Avoid taste compromise
- Maintain product safety, performance & functionality
- Inch down—help consumers change

Sustainable in the Market
- Must be appealing enough so consumers will buy it
- Thus the product can stay on shelf or in distribution
Story of Nature Valley Fruit Crisps

Made from baked pieces of apples with the skin

• 1 serving of fruit in every pouch

• Nutrition Information:
  - 50 calories
  - 0g fat
  - 75mg sodium
  - 13g carbohydrates
  - 1g fiber
  - 10g sugars

• Ingredients:
  Dried Apples, Contains 2% or Less of: Apple Juice Concentrate, Cinnamon, Sodium Sulfite (as a Preservative)

Discontinued!
Diets rich in whole grain foods and other plant foods and low in total fat, saturated fat and cholesterol may reduce the risk of heart disease and some cancers.

Stringent review and approval process

Various types of claims; *all* require substantiation that is based in science
Whole Grain
Consumers Are Looking For Whole Grains

62% of consumers are trying to increase whole grains in their diet
The Whole Grain Marketplace is Changing

“A lot of Whole Grain products were unpleasant 20 years ago. But now we have a variety of products because the industry invested a lot of research and development into how to make whole grains work”

Cynthia Harriman, director of food and nutrition strategies at the Whole Grains Council, an Oldways educational program, Boston
MyPlate: Grains on 1/4 of the Plate

Make at least HALF Your Grains WHOLE!

Whole Grain Health Benefits:

• Important energy source - form base of a healthy diet

• Provide nutrients for good health

• May lower risk of heart disease and diabetes, and help with weight maintenance

www.choosemyplate.gov
Anatomy of a Whole Grain

- **Bran**
  - “Outer shell” protects seed
  - Fiber, B vitamins, trace minerals

- **Germ**
  - Nutrient, Storehouse
  - Antioxidants, vitamin E, B vitamins, healthy fats

- **Endosperm**
  - Provides energy
  - Carbohydrates, protein
### Children Fail to Meet MyPlate Recommendations

**Children, 4 to 8 years**

<table>
<thead>
<tr>
<th></th>
<th>MyPlate Recommended&lt;sup&gt;1&lt;/sup&gt;</th>
<th>Current Intake&lt;sup&gt;2&lt;/sup&gt;</th>
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</thead>
<tbody>
<tr>
<td>Grains</td>
<td>5 oz-equiv.</td>
<td>6.7 oz-equiv.</td>
</tr>
<tr>
<td>Whole grains</td>
<td>3 oz-equiv.</td>
<td>0.5 oz-equiv.</td>
</tr>
<tr>
<td>Vegetables</td>
<td>2 cups</td>
<td>1.0 cup</td>
</tr>
<tr>
<td>Fruit</td>
<td>1 ½ cups</td>
<td>1.1 cup</td>
</tr>
<tr>
<td>Dairy</td>
<td>3 cups</td>
<td>2.3 cups</td>
</tr>
<tr>
<td>Protein</td>
<td>5 oz-equiv.</td>
<td>3.5 oz-equiv.</td>
</tr>
</tbody>
</table>

<sup>1</sup>www.choosemyplate.gov

<sup>2</sup>National Cancer Institute, 2010
Whole Grain in School Meals

• At least half of the grains offered during the school week must be whole grain-rich (upon implementation of the final school meals rule)

• Two years post-implementation of the final rule, all grains offered during the school week must be whole grain-rich

7 CFR Parts 210 and 220 Nutrition Standards in the National School Lunch and School Breakfast Programs; Proposed Rule, 2011
A Leading Source of Whole Grain: CEREAL

- RTE cereals are the leading whole grain source for kids\(^1,2\)
- Schools have a growing number of whole grain options

\(^1\)Harnack et al, JADA 2003
\(^2\)Bachman et al, JADA 2008
Whole Grain Products
Available in Schools

- Frozen whole grain pancakes, waffles, and French toast
- Oatmeal packets
- Whole grain and white whole grain baked goods
- Whole grain pizza
- Whole grain pasta
- Whole grain granola and energy bars
- Single-serve ready-to-eat cereals
Cereal
Cereal plays an important role in the diet

- A low calorie common breakfast choice
- 41% of milk intakes comes from RTE cereal
- A good source of vitamin D and calcium
- Provides 15-30% of key nutrients for children (Vitamin A, thiamin, niacin, vitamin B6, folate, iron and zinc)
- Research shows cereal consumption is related to improved nutrient intakes for both food secure & insecure children*
- Cereal is an inexpensive breakfast choice ($0.50 per serving, with milk)

*Presented at EB2011; NHANES ‘03-08; children 4-12yr)
Cereal Consumption Associated with Lower BMI

- Strong relationship between cereal consumption and lower BMI
- Cereal and breakfast consumption decreases with age, but...
- Girls who continue to eat cereal (N=>2300, 1/2 black and 1/2 white):
  - Have improved nutrient intakes
  - Are less likely to become overweight as they mature

NHLBI National Growth & Health Study
Barton BA et al, 2005
Packaged Foods
Value of Packaged Foods

- Improved Nutrition
- Availability
- Safety & Freshness
- Convenience & Affordability
- Variety & choice

(Source: IFIC “Understanding our Food”
www.foodinsight.org)
Value of Packaged Foods, continued

• Through Product Reformulation
  - Consumers have access to more products with reduced calories, fats, sugar, sodium than ever before

  (Source: GMA 2010 Health & Wellness Survey
  www.gmaonline.org)

• Packaging
  - portion control
  - preservation
Summary

• Consumer behavior and trends have an impact in our role of promoting nutritious choices
• Food manufacturers can and want to play a role in improving consumer health
• Product development challenges are not easy to overcome
• Industry companies, like General Mills, have set goals for product improvements and are making significant progress
• Whole Grain, Ready-to-Eat Cereal, and Packaged foods all play a key role in the food supply and in school foodservice
Health Professional Education

www.bellinstitute.com

- Free nutrition education resources
  (>2 million pieces distributed last fiscal)
- Free CME modules
Free Whole Grain In-Service Toolkit

- PowerPoint presentation
- Menu activity
- 1-hour CEU training
- Quiz and certificate as required by SNA for approved SNS CEU credits

Available at: www.bellinstitute.com
More Whole Grain Education

Go With The Whole Grain For Kids

For Grades K-5:
• Classroom and Gym Activities
• Worksheets
• PowerPoint Presentations

Available at: www.bellinstitute.com
Thank you!

Questions?