



FIBER, GRAINS & GLUTEN

2018 Global Topic Report – Detailed Outline

This 2018 report from HealthFocus International takes a deeper look at carbohydrates by exploring shoppers' views on fiber, grains and gluten—globally, regionally and across 22 individual countries—to help companies better understand shopper concerns and attitudes, allowing them to connect more powerfully with their targets and bring market solutions faster and more profitably.

MARKETS:

The following regions and countries are covered within the report:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil, Mexico, Colombia, and Argentina
- EUROPE: France, Germany, UK and Russia
- WEST ASIA: Saudi Arabia and Turkey
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, S. Korea, Thailand, and Vietnam

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TOPICS COVERED:

- **Sizing the Fiber & Whole Grain Markets**
 - Global shoppers are segmented into two groups: Fiber Seekers and Whole Grain Seekers. These groups, who are particularly interested in fiber and whole grains and who actively choose foods containing these, are explored to see how they differ from other shoppers and sized within each region and country. Groups are defined as follows:

- White bread
 - Pasta (excluding whole grains)
 - Whole grain pasta
 - Cold breakfast cereal
 - Hot breakfast cereal
 - Granola/cereal bars
 - Ancient grains (e.g., barley, amaranth, quinoa)
 - Quinoa
- Ratings (good carbohydrate/neither good nor bad/bad carbohydrate) for 14 different carbohydrates:
 - Barley
 - Beans
 - Biscuits/cookies
 - Breakfast cereal
 - Brown rice
 - Oatmeal
 - Pasta
 - Quinoa
 - Rice noodles
 - Sweet potatoes
 - Wheat bread
 - White bread
 - White potatoes
 - White rice
- Emerging grains: Which niche grains are shoppers most interested in using more of in their diet?
 - Amaranth
 - Black rice
 - Chia
 - Farro
 - Freekeh
 - Kamut
 - Millet
 - Quinoa
 - Sorghum
 - Spelt
 - Teff
- Ancient grains
 - How interested are shoppers in ancient grains?
 - Of those interested, how many are willing to pay up to 10% more for products that include ancient grains?
 - How often do shoppers use Ancient grains (e.g.,barley, amaranth, quinoa)
- Do shoppers think they are getting too many carbohydrates in their diet on average?

- Low carbohydrate:
 - How many shoppers always/usually maintain a low carbohydrate diet?
 - How many have decreased their use of carbohydrates in the past 2 years?
 - How important are “low carbohydrate” statements on labels?
- **Shopper Views on Gluten**
 - How many shoppers always/usually avoid gluten? Which markets are most focused on avoiding gluten?
 - How concerned are shoppers about gluten?
 - How important are “gluten-free” statements on labels?
 - How has use of gluten-free foods changed in the past two years? (Increased, same, decreased or don’t use)
 - How many shoppers are interested in gluten-free products? What are the primary drivers for interest in gluten free (e.g., general health, weight management, gluten intolerance, or they don’t know what they are but are still interested)?
 - How many shoppers are concerned about gluten intolerance vs. how many are actually personally affected?
- **Appendix - Carbohydrate Ratings & Individual Country Snapshots**
 - Individual slides for all 14 different carbohydrates rated as good/bad/neutral carbohydrates for side-by-side comparisons displaying how ratings for each vary by region & country.
 - Barley
 - Beans
 - Biscuits/cookies
 - Breakfast cereal
 - Brown rice
 - Oatmeal
 - Pasta
 - Quinoa
 - Rice noodles
 - Sweet potatoes
 - Wheat bread
 - White bread
 - White potatoes
 - White rice
 - Individual Country Snapshots for all 22 countries providing a quick overview of shopper attitudes & options on the country level.