Grains & Legumes Nutrition Council™

Cultivating Good Health

Health & Nutrition – Driving Grains Innovation

2014 Australian Grains Industry Conference

29 July 2014

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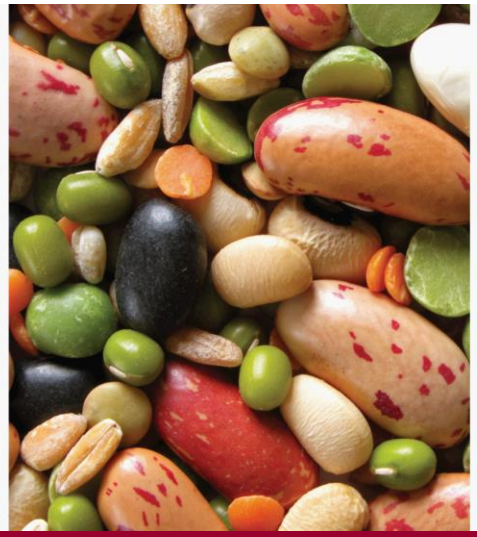

GLNC Overview

GLNC Overview

Independent authority on the nutrition and health benefits of grains and legumes

Health Promotion Charity and non-profit organisation

Promote grains and legumes nutrition as part of a balanced diet through evidence-based information cultivating good health

Influencing the grains & legumes chain

We link the entire grains and legumes industry value chain

from grain growers…

… to consumers

GLNC Contributors

GRDC Grains Research & Development Corporation

Grain Growers — Real benefits. Real results.

PULSE AUSTRALIA

Woods Foods — A part of the Woods Group

Nestlé — Good Food, Good Life

CPWSA

Bakers Delight — We're for real.

Sanitarium — health & wellbeing

Sun Rice — The Rice Food Experts

Kellogg's

UniGrain Pty Ltd

goodman fielder — our homegrown food company

AUSTRALIAN FOOD AND GROCERY COUNCIL

McKENZIE'S — SINCE 1852

HEINZ

GWF / George Weston Foods Limited

Campbell's

ARNOTT'S — THERE IS NO SUBSTITUTE FOR QUALITY™

Edgell

Our Strategic Priorities

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Nutrition Science

Review and invest in the science – current and emerging trends

Advocacy

Actively develop positions and respond to industry policy and regulatory issues

Education

Communicate latest research findings about nutrition and health benefits of grains, grain-based foods and legumes to:

key opinion leaders, health care professionals, educators,
food processors, food manufacturers, the media

Health & Nutrition Insights

Acknowledgement

Insights prepared for Grains & Legumes Nutrition Council by Colmar Brunton representative: Sarah Hyland

What are the nutrition trends?

Key Trends

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Key Trends

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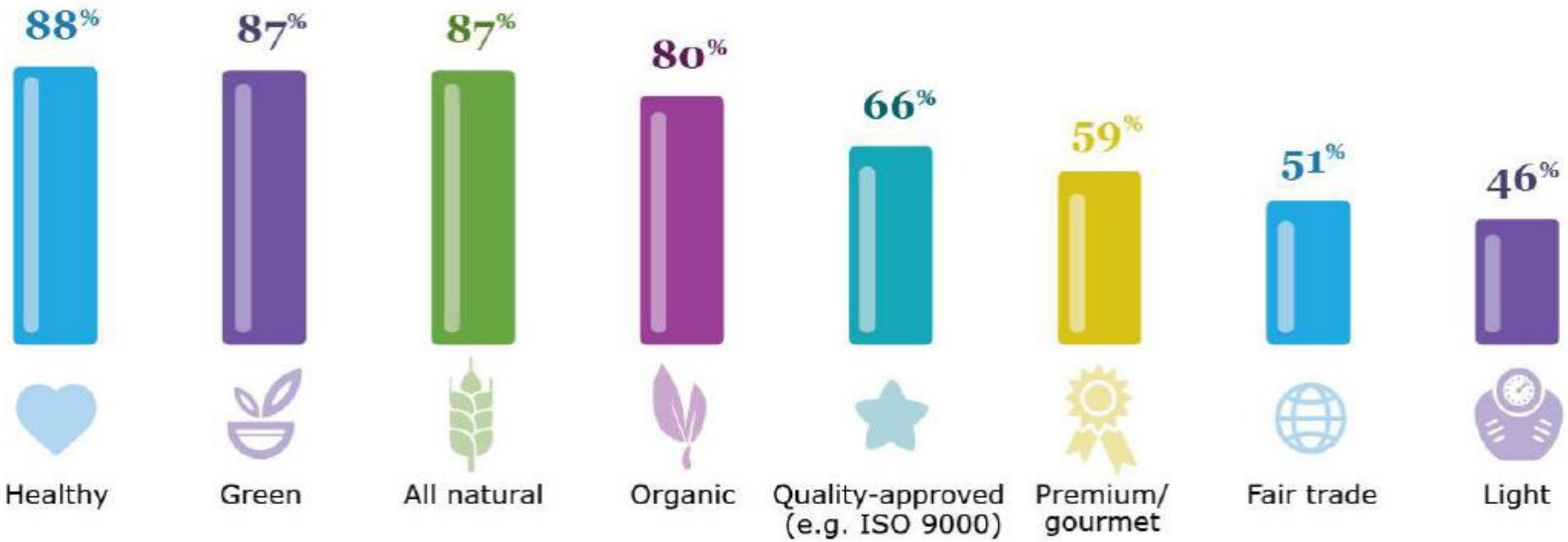
Claims worth paying extra for, China, March 2012
Base: 3,000 internet users 20+
Source: Mintel Oxygen

Any likely:



Key trends

Lack of whole grains, legumes, putting Australian health at risk

This story was published: 7 DAYS AGO | MAY 22, 2014 12:30AM

ONLY one third of Australians are consuming enough whole grains and may b putting their health at risk, according to new research.

At least 75 per cent of Australians are not meeting the recommended three or more serves of whole grain foods each day, says the Australian Grains and Legumes Nutrition Council.

... as one third of diets go against the grain

KRISTIN SHORTEN

ONLY one-third of Austra-lians are consuming enough whole grains and may be put- t risk, ac- in the overall consumption of wholegrain foods.

GLNC managing director Georgie Aley said people are putting themselves at higher risk of developing diabetes and

lunch. The Grains & Legumes Nutrition CouncilTM recommends that we eat at least 48g of wholegrains every day as part of a healthy, balanced diet. One 25g serving of SunRice Rice & Grain Squares Linseed

Against the grain

The Grains & Legumes Nutrition Council (GLNC) is worried about the trend away from wheat-based grain foods.

Is the groundswell of support for wheat-free diets as a healthy eating plan justified by evidence?

DR ROSEMARY STANTON OAM

Key trends

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Grains …for the first time….
now in Retail World!!

- Additives
- $40M value
- Driven by quinoa ($11M) , chia ($9M)
- Woolworths Macro brand a huge driver

Free-From

“Free-From” Movement

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Moved into mainstream….

The **‘free-from’ foods market is booming in many parts of the world**, widening into new categories and increasingly moving into the mainstream with introductions from major food manufacturers and brands, according to market research organisation Innova Market Insights.

According to Innova Market Insights, considerable effort has gone into developing **gluten-free and lactose-free** products globally in recent years, but at the same time the whole **‘free-from’ category is widening** out to include broader definitions such as

- **‘dairy-free’**
- **‘additive-free’**
- **‘preservative-free’**
- **‘GM-free’.**

“Free-From” Movement

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Moved into mainstream….

- **The clean-label trend** has moved forward considerably in recent years. Nearly **13 per cent** of total food and drink launches recorded globally in **2013** used additive- and/or preservative-free claims, up from **10 per cent in 2008.**
- While claims using the **term ‘natural’** have increasingly come under fire **for lack of clarity regarding definition,** the use of **additive-free and preservative-free claims has been able to move forward relatively unhindered**,” said Lu Ann Williams, Director of Innovation at Innova Market Insights.

Free-From Movement

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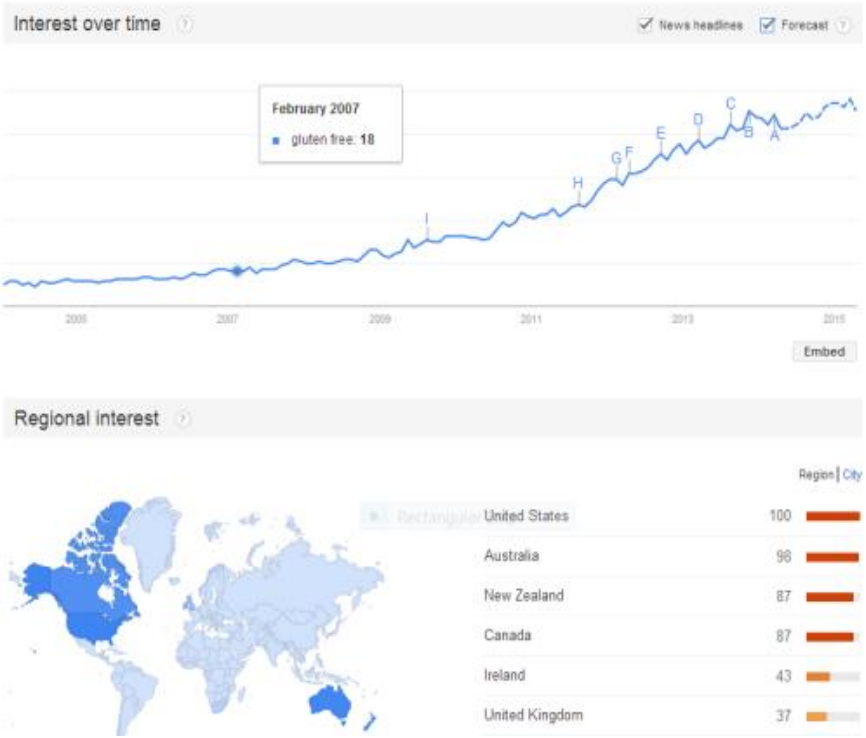
Gluten Avoidance

'Nearly **8 per cent** of **product launches** recorded in **2013** used a **gluten-free** positioning, rising to 10 per cent in Western Europe, and nearly 14 per cent in the US.'

Source : Innova Market Insights



Free-From Movement

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Developments beyond gluten-free:

The **focus** has been and remains **primarily on gluten-free**, but **other allergen concerns are present** and there is evidence of increasing **consumer interest** in others, such as **lactose intolerance** – and companies are responding to these with product developments. The same driver of self-diagnosis is at work.

“Free-From” Movement

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GM-free labelling use growing

- “Interest in naturalness is still highly evident, however, and is also reflected in the **growing use of GM-free labelling,”** Ms Williams said. “Although it remains relatively limited on a global scale,” she said.

- Just **2.3 per cent of global launches used GM-free labelling in 2013. Snacks, bakery and dairy** had the largest number of launches, reflecting the significance of GM ingredients in sectors using high **levels of cereals for food** or feed, ahead of meat, fish, eggs, confectionery and ready meals.

Protein

Protein has undergone a 10-year evolution

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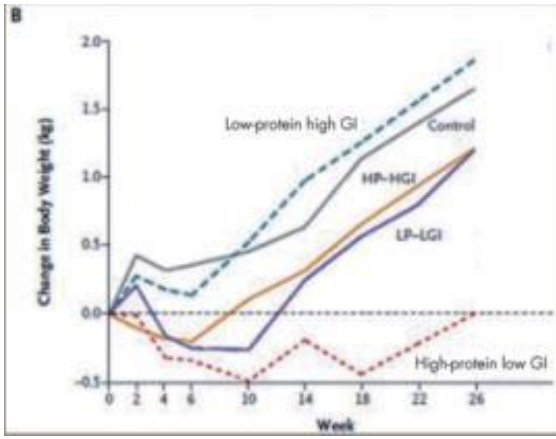

Factors driving protein's rise

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1. A decade of steadily increasing **consumer understanding** that **protein** is a "**good** thing" to have in a healthy diet.
2. The **evolution of science**.
3. The increased **emphasis** given to **protein** by **weight management** regimes.
4. The **transition** of **high-protein sports nutrition products** from **body-builder niche to health-conscious** early adopters.
5. **Legitimisation of protein** as something you expect to find in a variety of regular foods, not only as part of a main meal.
6. Improvements in the **taste and texture** of high protein products.

New Product Formats

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New sources of protein rapidly emerging

Creation of a **bakery mix for fresh bread** with **microalgae integrated** into the recipe, with **5% by weight Chlorella pirenoidosa microalgae.** Called Meerbrood, it is today **produced by 125 Dutch bakeries** and its success has led to requests for the Meerbrood mix from the **Nordic countries, Germany, France, the UK and the US.**

It's a first step on the way to **"normalising" algae as source of good nutrition** – and enabling manufacturers in a variety of categories to use it.

Product Development & Opportunities

New Product Formats

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In the US, protein "went mainstream" in 2013

General Mills Nature Valley protein bar was one of the **10 most-successful new products in the US in 2012**:

- $95m in sales in 2012
- $130m in 2013

New Product Formats

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Special K Nourish is made with **quinoa**, a favourite of foodies attached to so-called ancient grains – as well as **wheat** and **barley**.

Nourish will promote **a satiety benefit, filling up consumers with 8g of protein** and **5g of fibre per serving** as well as yielding fewer than **200 calories.**

22% protein

'Weet-Bix Energize is **82% wholegrain.** *Each serve is loaded with* **11g of protein (***to help build muscles). Plus iron, niacin, thiamin and riboflavin (to help release the energy you need to power your day), and folate (to help fight fatigue). As part of a balanced diet rich in protein, vitamins and minerals.'*

Grains

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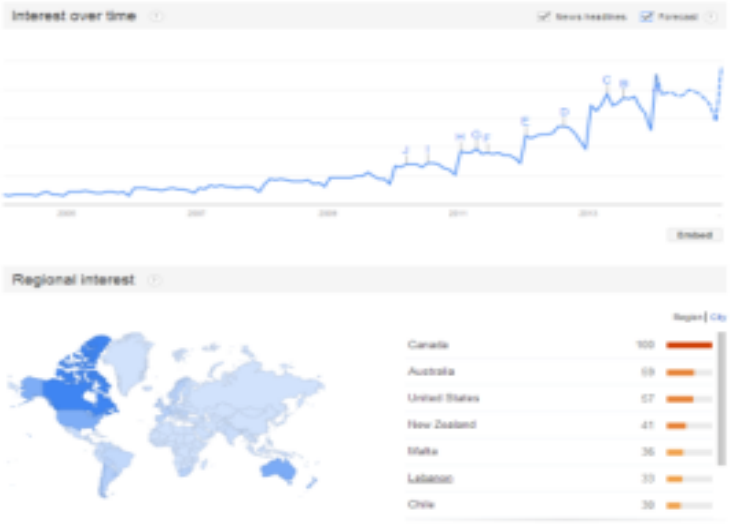
- **Quinoa** still in serious growth
- 2013 was International Year of Quinoa
- Launches of quinoa products increased by over 50% in FY13 and have risen more than five-fold over a five-year period
- Reflects rising levels of awareness of their **nutritional properties**, plus **flavour profile**
- Traditional, natural and nutritious
- **38% of them using a gluten free platform**
- Chiefly US & Europe based



Grains

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Quinoa moving into the mainstream

Grains

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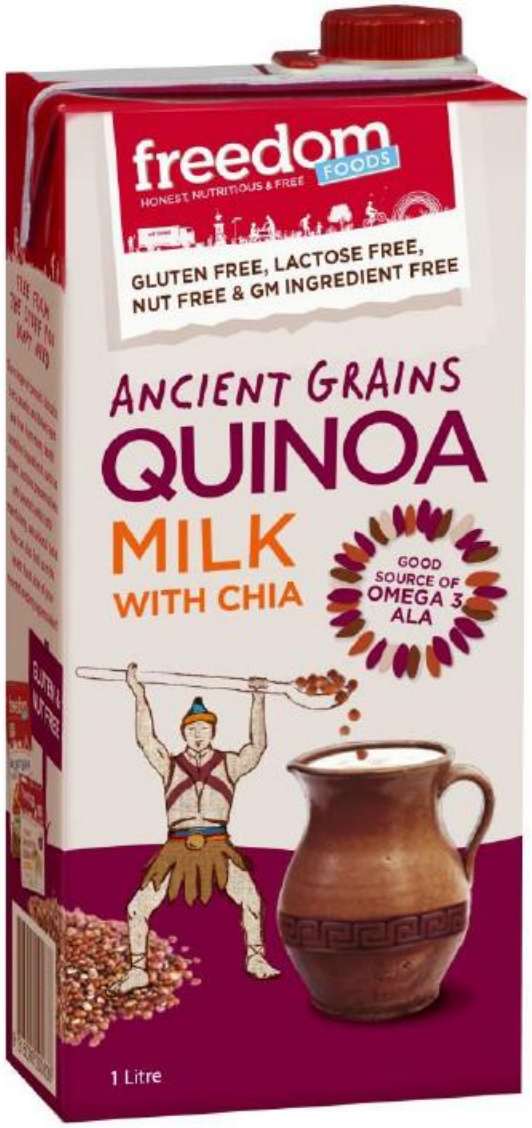
Quinoa products still on the increase – still room to run, perceived health food. Huge range of segments are adding a quinoa SKU

Salads, breads, chocolate bars, trail bars, cereals now milk!!

Good example of a company **innovating with a grain**.



Grains

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- **Chia** emerging
- Launches of products containing chia rose from "probably single figures" 5 years ago to numbers in the hundreds, with an increase of nearly 50% in FY13.
- The **US dominated activity**, accounting for nearly half of the total introductions recorded.
- Launches ranged across a number of sectors

Pulses

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- Chickpeas in growth!

- Wet Seed Beans: The **ONLY canned vegetables in growth** due to awareness of health benefits
- FY12 +3%
- FY13 +4.4%

Pulses

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- **Hommus** has had massive growth in the US!
- Hommus had expanded from being a $5 million-a-year US market in 1995 to one worth $325 million in 2010.

"If the American markets are an indicator for potential growth, we may expect to see further changes in consumer habits. Australia, as a major producer of grains, pulses and other dry land crops, will be a potential beneficiary of new opportunities to produce more of the world's chickpeas to meet growing demand for protein and the hummus market in particular."

- Launched in AU in November 2013
- 8 SKUs

Pulses

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Pro-Teen

Chickpea & banana as well as being free-from everything.

Summary

- Free-from, protein, naturally functional and slow energy
- Gluten free “fad” now long term trend
- Need for innovation with grains that can leverage gluten free platform
- Innovation opportunity around composite foods – grains & pulse – meet protein and slow energy
- Traditional grain food formats changing….

Thank you

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2016 International Year of Pulses