

# *“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

Sometimes Eat  
Healthy Anyway



## CONVENIENCE

## TASTE



Health Not a Top  
Concern



Family Time a  
Top Concern



Wish to Eat Healthy



Wish to Eat  
Healthy



\*2010 Data

# The Consumer Reality

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 and 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



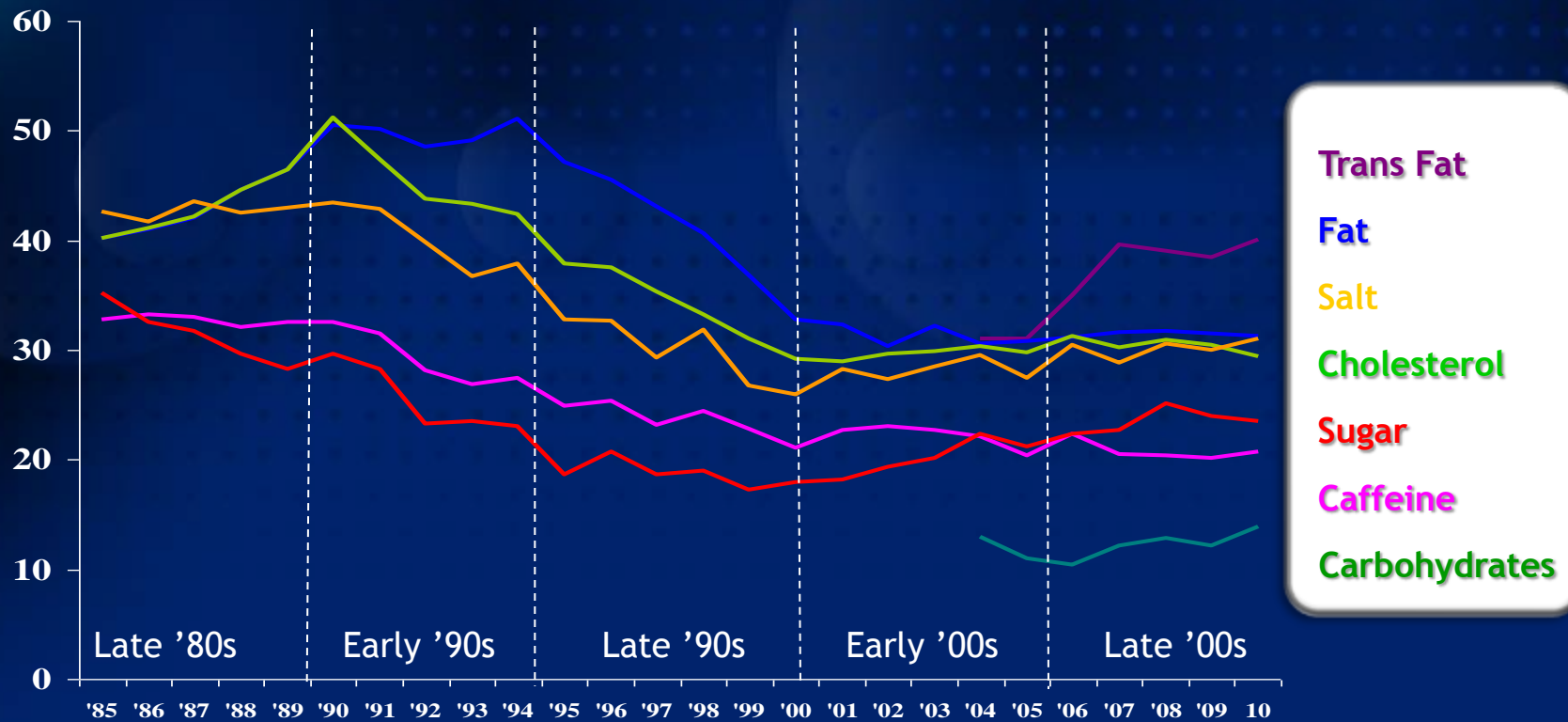
Everyone has something they will never give up



# Consumer Level of Concern for Key Limiters

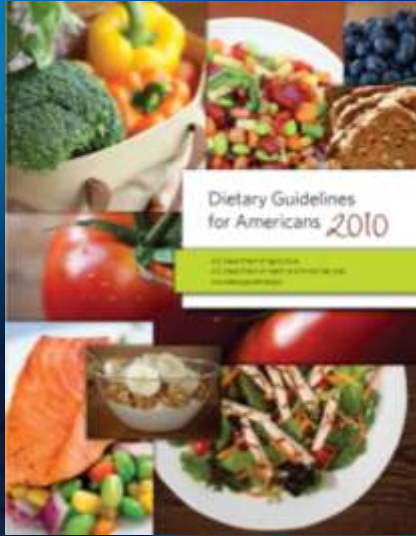
“A person should be very cautious in serving foods with ...”

Percent of Respondents that Completely Agree with the Statement:



Source: National Eating Trends® Nutrition Survey, years ending Feb

# Consumer Nutrition Shortfall



According to the Dietary Guidelines 2010, Americans fall short on key nutrients & foods:

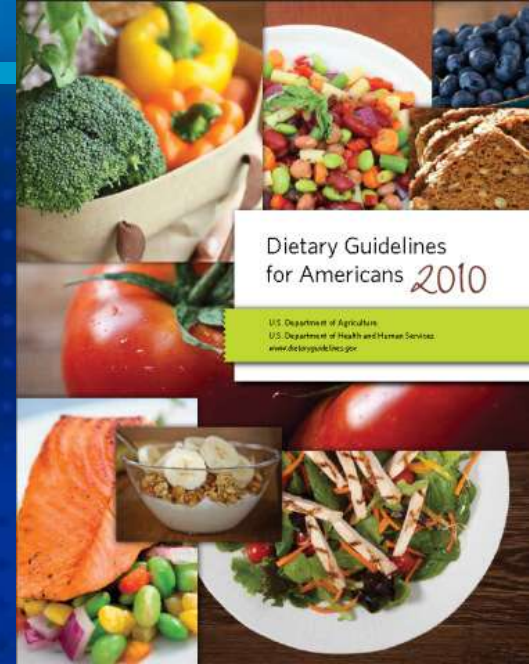
- Calcium
- Vitamin D
- Potassium
- Fiber
- Whole Grains
- Dairy
- Fruits & Vegetables





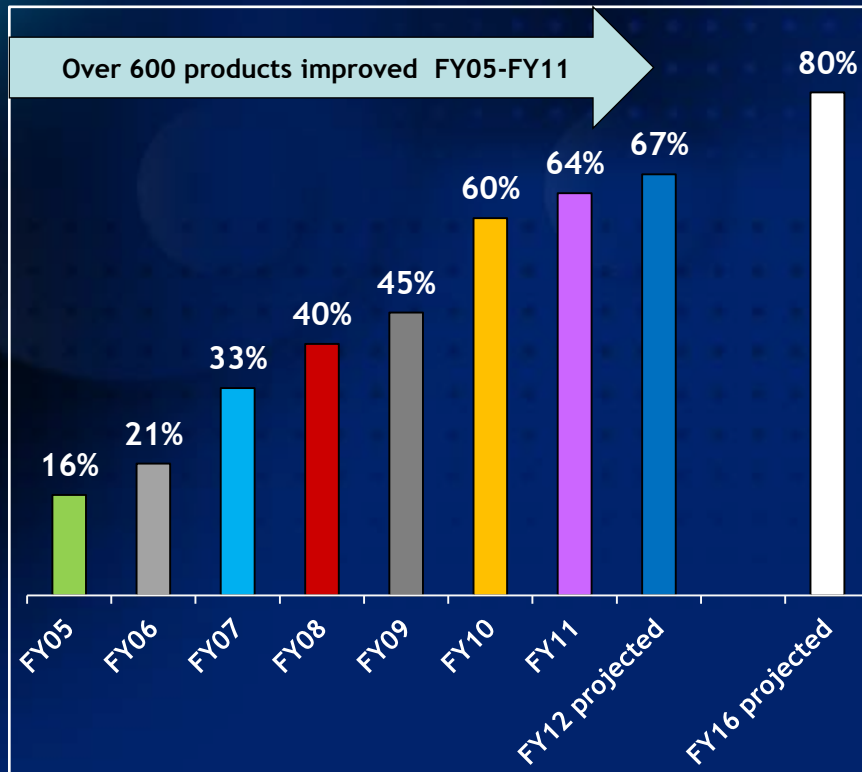
# 2010 Dietary Guidelines for Americans

- 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

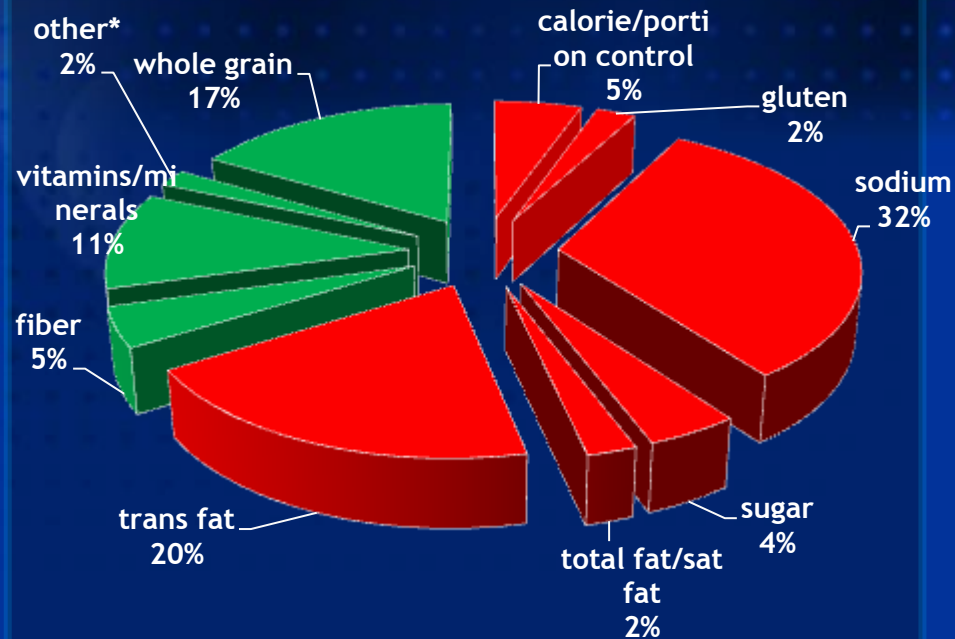


# Continuous Health Improvement

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



## Key Drivers Nutritional Improvement FY05-FY11



Decreasing Limiters 66%

Increasing Positives 34%

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



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

# 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

## KEY

2007 Sugar level

2008 Sugar level

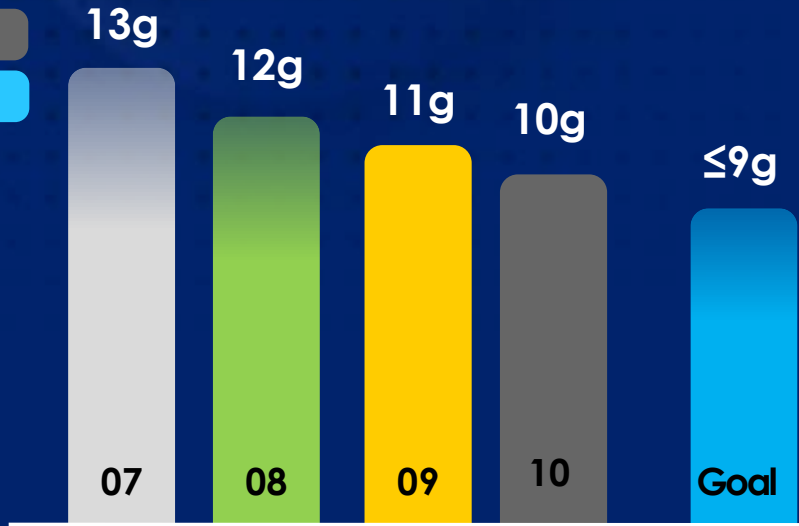
2009 Sugar level

2010 Sugar level

Goal Sugar level



Commitment to further reduce sugar level

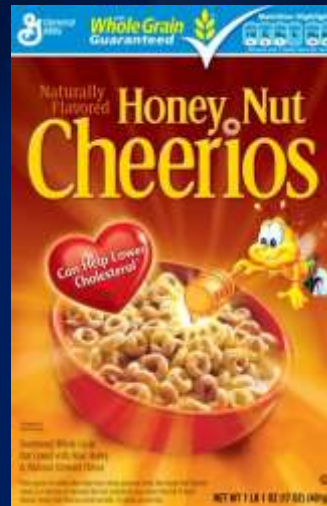


# ...but Health Innovation is Challenging

Health Benefit



Great Taste



Affordable



Deliver meaningful consumer health benefits with no taste trade-off AND affordability



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# 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)



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**Discontinued!**

# Substantiation of Health Claims

Marketing

Legal

Regulatory  
(FDA  
requirements)

Science

Stringent review and  
approval process



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.

Various types of claims; *all* require substantiation that is based in science



# Whole Grain



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# 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 in to how to make whole grains work”

Cynthia Harriman, director of food and nutrition strategies at the Whole Grains Council, an Oldways educational program, Boston

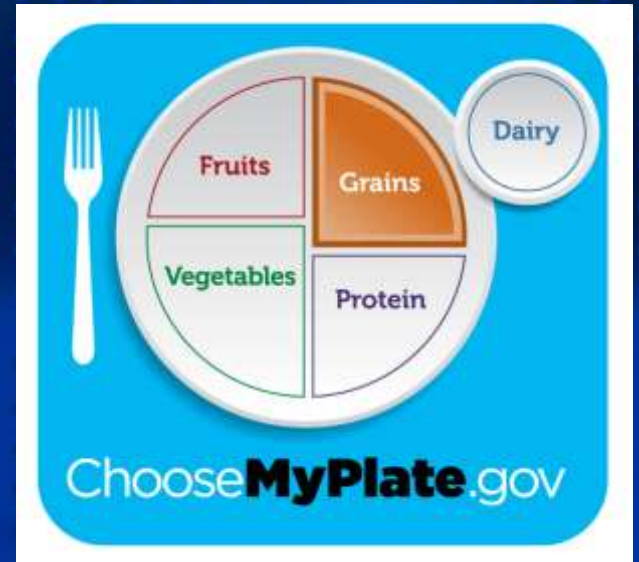


# MyPlate: Grains on 1/4 of the Plate

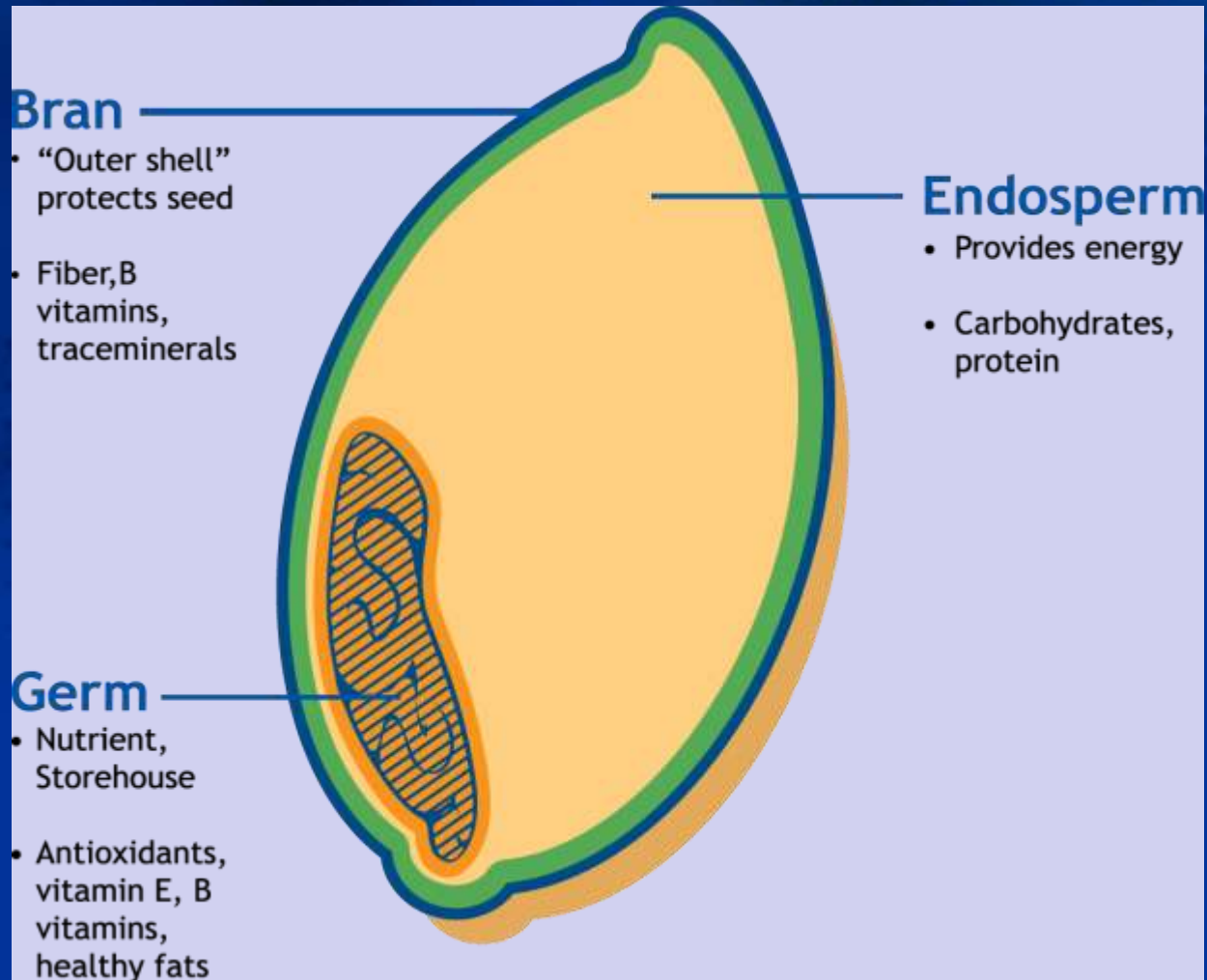
Make at least HALF Your Grains  
WHOLE!

## 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



# Anatomy of a Whole Grain



# Children Fail to Meet MyPlate Recommendations



Children, 4 to 8 years

|                     | MyPlate Recommended <sup>1</sup> | Current Intake <sup>2</sup> |          |
|---------------------|----------------------------------|-----------------------------|----------|
| Grains              | 5 oz-equiv.                      | 6.7 oz-equiv.               | +        |
| <b>Whole grains</b> | <b>3 oz-equiv.</b>               | <b>0.5 oz-equiv.</b>        | <b>-</b> |
| Vegetables          | 2 cups                           | 1.0 cup                     | -        |
| Fruit               | 1 ½ cups                         | 1.1 cup                     | -        |
| Dairy               | 3 cups                           | 2.3 cups                    | -        |
| Protein             | 5 oz-equiv.                      | 3.5 oz-equiv.               | -        |



# 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



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# A Leading Source of Whole Grain: CEREAL

- RTE cereals are the leading whole grain source for kids<sup>1,2</sup>
- Schools have a growing number of whole grain options





# 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



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# Cereal plays an important role in the diet

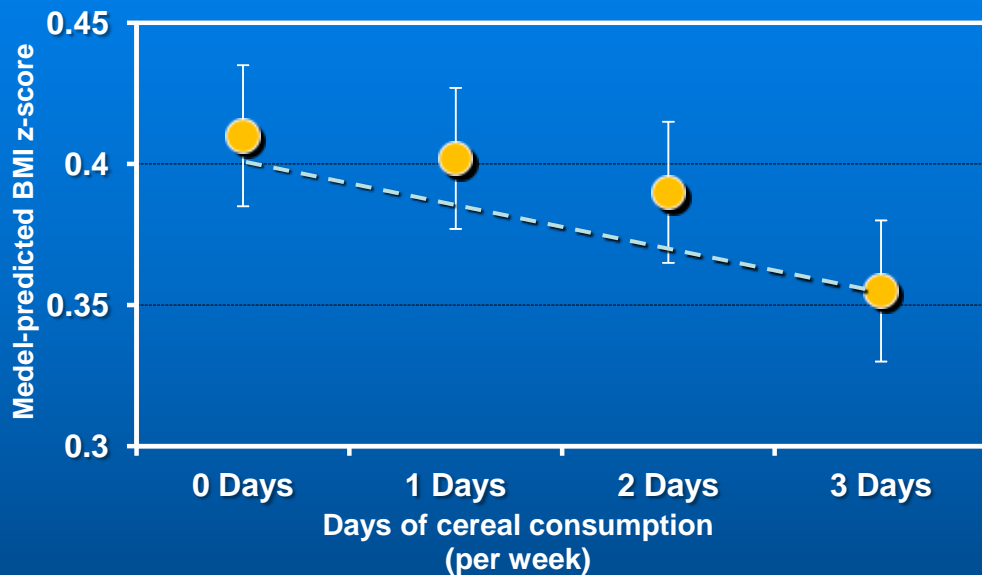
- A low calorie common breakfast choice
- 41% of milk intakes comes from RTE cereal
- A good source of vitamin D and calcium
- Provides 15-30% of key nutrients for children (Vitamin A, thiamin, niacin, vitamin B6, folate, iron and zinc)
- Research shows cereal consumption is related to improved nutrient 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

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# How Cereal Is Made



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# Packaged Foods



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# Value of Packaged Foods

- Value of Packaged Foods
  - Improved Nutrition
  - Availability
  - Safety & Freshness
  - Convenience & Affordability
  - Variety & choice

(Source: IFIC “Understanding our Food”  
[www.foodinsight.org](http://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](http://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

The screenshot displays the website for the Bell Institute of Health and Nutrition, a General Mills initiative. The page is titled "Your Professional Resource for Nutrition Education" and features a navigation menu with links for Home, Blog, About Us, Contact Us, Sign In/Register, and RSS Feeds. A search bar is also present. The main content area is divided into several sections:

- Health Conditions**: A sidebar menu listing various health topics.
- An Inspiring Trip to Las Vegas**: A featured article with a photo of three people, one holding a certificate. The text mentions attending the AAPA 39th Annual Physician Assistant Conference in Las Vegas.
- 2010 Dietary Guidelines Webinar**: A section for a webinar on the 2010 Dietary Guidelines, including a "View Webinar" link.
- FREE Continuing Education Credits**: A section for a program offering 1 CPEU for registered dietitians and dietetic technicians, with a "Start the Program" link.
- Yoplait Yogurt Coupon Tearpads**: A section for tearpads that help clients learn tips to maintain healthy bones and how Yoplait Light yogurt can fit into a weight management plan.
- Putting the Whole Grain Puzzle Together: Health Benefits Associated with Whole Grain**: A section for a summary of the American Society for Nutrition 2010 Satellite Symposium.

At the bottom of the page, there is a "Member Survey" section with a question about attending conferences in Las Vegas. The website is viewed in a browser window, and the taskbar at the bottom shows several open applications, including Microsoft Outlook, Microsoft PowerPoint, and the Nutrition Education Resource for Professionals.

- Free nutrition education resources
- (>2 million pieces distributed last fiscal)
- Free CME modules



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# Free Whole Grain In-Service Toolkit

The image shows a screenshot of a website's navigation menu. The menu items are: Nutrients and Vitamins, Professional Tools, Foodservice Resources, Supermarket Dietitian, WIC Resources, and Product Nutrition Information. A dropdown menu is open under 'Supermarket Dietitian', listing 'Healthcare', 'K-12', and 'K-12 Speaker Bureau Program'. A white arrow points from the 'K-12' option to a separate image of the 'Whole Grain In-Service Toolkit for Schools' cover. The cover features a bowl of cereal, a group of people, and wheat stalks.

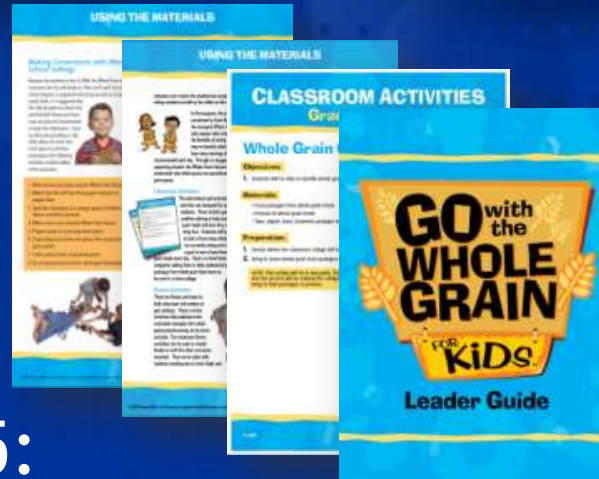
- PowerPoint presentation
- Menu activity
- 1-hour CEU training
- Quiz and certificate as required by SNA for approved SNS CEU credits





# More Whole Grain Education

## Go With The Whole Grain For Kids



For Grades K-5:

- Classroom and Gym Activities
- Worksheets
- PowerPoint Presentations



# Thank you!

Questions?

