

By the Numbers: Breaking Down the Gluten-Free Trend



The gluten-free food market is projected to soar,¹ with a third of new products claiming “gluten-free.”²

\$9.99 billion

Projected global gluten-free food market in 2028³

8.29%

Global CAGR forecast for gluten-free food market 2021-2028⁴

33%

Percentage of new products in 2017-2021 that included a gluten-free claim or positioning⁵

Who is eating gluten-free?

Gluten-free foods appeal to consumers with celiac disease and non-celiac gluten intolerance, conditions where consuming gluten leads to potential health problems.⁶

Many other consumers have opted into gluten-free diets for the perceived “better-for-you” benefits, creating a strong market that is ripe for innovation.

1%

of the American public has been diagnosed with celiac disease.⁷

6%

of the American public are estimated to be affected by non-celiac gluten sensitivity.⁸

~20%

of Americans opted for a gluten-free diet in 2022.⁹

53% of consumers claim to eat gluten-free with purpose at least sometimes, and **48%** of consumers eat gluten-free by choice, driven by curiosity, overall perceived benefits, and peer or family support.¹⁰

Which gluten-free ingredients are consumers interested in for their gluten-free baked goods?¹¹

Incorporating these ingredients into new recipes has consumer appeal.

Figures shown indicate the percentage of gluten-free consumers who are very interested in the ingredient in a gluten-free baked good.

58%

Oat

58%

Almond

54%

Rice

41%

Chickpea

44%

Quinoa

35%

Buckwheat

Which gluten-free ingredients are increasingly being used in new bakery and CPG products?¹²

Check the shelf and you'll find new bakery and CPG products with these gluten-free ingredients.

Figures shown indicate the Compound Annual Growth Rate of Usage Share (2017-2021) in new gluten-free products that include the ingredient.

92%

Lentil Flour

43%

Quinoa & Quinoa Flour

14%

Buckwheat Flour

14%

Chickpea & Chickpea Flour

14%

Oat Flour

5%

Sorghum Flour

Which categories are showing an increase in gluten-free products?¹³

Each of these categories showed an increase in products made with gluten-free ingredients.



Bread and Bread Products



Cakes — Pastries & Sweet Goods



Crackers/Savory Biscuits



Cookies/Sweet Biscuits



Cereal/Energy Bars



Cereal (Breakfast)



Frozen Pizza



Plain Pasta & Noodles



Snacks

Deliver on Gluten-Free with Ardent Mills' Portfolio of Flours and Grains.

We're committed to being an industry leader with our robust product portfolio of plant-forward and gluten-free products, backed by Ardent Mills Emerging Nutrition, our alternative grain center of expertise that helps customers innovate with confidence and ease.



Organic Quinoa Flour and Grains



North American Quinoa Flour and Grains



Buckwheat Flour and Groats



Amaranth Flour and Grains



Millet Flour and Grains



Sorghum Flour and Grains



Teff Flour and Grains



Chickpea Flour and Whole Chickpeas



Red and Green Lentil Flours



Oat Flour



Potato Flour



Fava Bean Flour



Gluten-Free 1-to-1 All Purpose Flour



Gluten-Free Pizza Flour



Rice Flours

Ardent Mills Knows Gluten-Free

Ready to meet consumer demand for innovative new products made with gluten-free ingredients? Ardent Mills has the specialized expertise that can help you navigate your options.

Get in touch with an Ardent Mills Rep today! Call (888) 680-0013

¹Gluten-Free Food Market Size, Share & COVID-19 Impact Analysis, Fortune Business Insights, March 2022, <https://www.fortunebusinessinsights.com/industry-reports/gluten-free-food-market-100188>. ²Innova Market Insights, "Gluten-Free Food Market Size, Share & COVID-19 Impact Analysis," Fortune Business Insights, March 2022, <https://www.fortunebusinessinsights.com/industry-reports/gluten-free-food-market-100188>. ³<https://www.globenewswire.com/news-release/2023/04/18/2648783/0/en/Gluten-Free-Food-Market-to-Hit-USD-9-99-Billion-by-2028-At-a-CAGR-8-29.html>. ⁴Innova Market Insights. Results based on the following product types: Bread and Bread Products, Cakes – Pastries & Sweet Goods, Crackers/Savory Biscuits, Cookies/Sweet Biscuits, Cereal/Energy Bars, Cereal (Breakfast), Frozen Pizza, Plain Pasta & Noodles, Snacks. ⁵"Considering a gluten-free diet," Harvard Health Publishing, March 3, 2022, <https://www.health.harvard.edu/diseases-and-conditions/considering-a-gluten-free-diet>. ⁶Igbiniedion SO, Ansari J, Vasikaran A, Gavins FN, Jordan P, Boktor M, Alexander JS, Vasikaran A, Gavins FN, Jordan P, Boktor M, Alexander JS. "World Gastroenterology, October 28, 2017, <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5677944/>. ⁷Igbiniedion SO, Ansari J, Vasikaran A, Gavins FN, Jordan P, Boktor M, Alexander JS. "Non-celiac gluten sensitivity: All wheat attack is not celiac." World Gastroenterology, October 28, 2017, <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5677944/>. ⁸Ardent Mills proprietary research, August-September 2022. ⁹Ardent Mills proprietary research, August 2022. ¹⁰Ardent Mills proprietary research, August 2022. ¹¹Innova Market Insights. ¹²Innova Market Insights.