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.

of the American public

has been diagnosed

of the American public are estimated to be affected by

non-celiac gluten sensitivity.8

perceived benefits, and peer or family support.10

of Americans opted for a gluten-free

diet in 2022.9

and 48% of consumers eat gluten-free by choice, driven by curiosity, overall

are consumers interested in for their

of consumers claim to eat gluten-free with purpose at least sometimes,

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.

Which gluten-free ingredients

58%

41%

58%

Oat

Almond

54% Rice



Quinoa

44%

35% Buckwheat

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.

Which gluten-free ingredients

43%

Quinoa

& Quinoa

Flour

Flour

92%

Lentil

14% Chickpea & Chickpea Flour

Buckwheat Flour 5%

14%

Which categories are showing

14% Oat Flour

Sorghum Flour

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

an increase in gluten-free products?13

Cakes — Pastries & Crackers/Savory Biscuits Bread and Bread Products



Cookies/Sweet Biscuits



Cereal/Energy Bars



Cereal (Breakfast)





Plain Pasta & Noodles

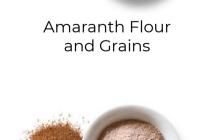
We're committed to being an industry leader with our robust product portfolio of plant-forward and gluten-free products, backed by Ardent Mills

Emerging Nutrition, our alternative grain center of expertise that helps customers innovate with confidence and ease.



Snacks

Organic Quinoa Flour North American Quinoa **Buckwheat Flour** Flour and Grains and Grains and Groats



Teff Flour and Grains

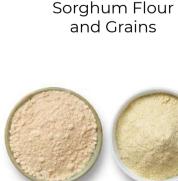


Whole Chickpeas

Potato Flour

Millet Flour

and Grains



Red and Green **Lentil Flours**



Oat 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

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