

Welcome to **The Kernel**<sup>TM</sup>, your industry resource spotlighting trends, consumer preferences and market opportunities across the dynamic world of grains, flour and pulses. Our goal is to equip your team with the knowledge and insights required to help you grow your business, better connect with consumers and gain a competitive advantage.

In this edition, we're looking at how **GLP-1 (anti-obesity) medications** are changing consumer eating behaviors and impacting the food industry.

Read on to learn how GLP-1-friendly ingredients are helping to support the development of GLP-1-friendly foods and on-pack claims.

## Today's GLP-1 Landscape

More consumers are trying GLP-1 medications to help with weight management goals.



**18.7 million**

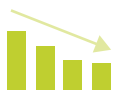
U.S. consumers are currently prescribed GLP-1s<sup>1</sup>



**1 in 10**

U.S. consumers could be taking GLP-1s by the end of 2025<sup>2</sup>

GLP-1s are quickly changing consumer behaviors.



**1.5–2.1%**

The predicted reduction in total adult caloric intake by the end of 2025<sup>3</sup>



**\$48 billion**

The annual reduction in food and beverage spending through 2034<sup>4</sup>

GLP-1 users represent a

**\$190 billion market**

for brands that adapt to the unique dietary needs of this growing segment.<sup>5</sup>

## Potential Impact to Applications

Low-fiber, high-sugar and refined carbohydrate foods are generally not recommended when taking GLP-1s.<sup>6</sup> This means many bread, bakery, cereal and snack products could experience a decline in sales as GLP-1 use increases.

## The Opportunity

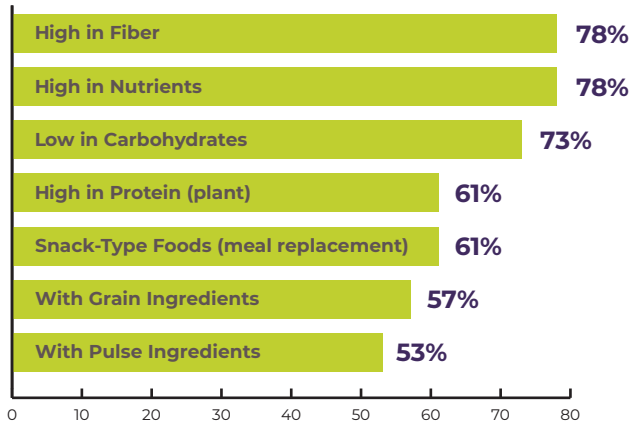
This shift can unlock exciting opportunities to innovate with fiber-forward, higher protein, whole grain and nutrient-dense ingredients that could help consumers meet their nutritional goals.

Our team is ready to help you innovate with confidence – offering ingredient solutions that align with consumers' emerging health and wellness trends, while preserving any taste, texture and sensory experiences GLP-1 users may prioritize.



## Priority Food Characteristics for GLP-1s

Consumers on GLP-1s report prioritizing specific food characteristics that can help increase satiety, maintain muscle mass, support weight management and promote digestive health.<sup>7</sup>



## Rethinking Food Labels

Brands can help GLP-1 users identify healthier options through intentional labeling. In addition to existing claims, such as “high fiber” and “high protein,” some brands are creating labels specifically for consumers on GLP-1s. For example, Conagra created a first-of-its-kind labeling initiative for its Healthy Choice® line<sup>11</sup> – a new “On Track” badge that helps consumers identify “GLP-1-friendly” products that are high in protein, low calorie and a good source of fiber.<sup>12</sup>

## Product Spotlight

### Chickpeas & Chickpea Flour

Consumers looking for “better-for-you” products are already gravitating toward chickpeas. Now, GLP-1 users are adding to demand for chickpea-inclusive products as they seek “guilt-free” snacks. Chickpeas are versatile, inherently gluten-free and add a rich, nutty flavor that often feels indulgent for consumers on GLP-1s.



### UltraGrain® Whole Wheat Flour

Eating for fiber is already a top five wellness dietary behavior.<sup>8</sup> With the addition of GLP-1s, fiber-containing ingredients are playing an even more important role in food innovations. UltraGrain® 100% whole wheat flour can help support the development of GLP-1-friendly foods. It delivers on whole grain nutrition and consumer demand for products with a taste, texture and color consumers prefer. UltraGrain® works well in bread, bakery or snack applications.<sup>9</sup>



**Fiber isn't trending just for GLP-1 users. In fact, more than 50% of consumers are willing to pay more for grain-based foods that are high in fiber.<sup>10</sup>**

## Same Consumers, Nuanced Needs

The food industry is at a crossroads. CPG manufacturers that get ahead of this evolving trend and innovate strategically have the chance to retain existing spend from consumers taking GLP-1s – and gain incremental share.

Our role is to help you craft products with ingredients that win on shelf, and you don't want to miss this growing segment of the market. Ardent Mills' portfolio of nutrient-dense whole grains and pulses are well-suited to support the development of GLP-1 friendly foods.

Click below to explore our full portfolio of ingredients that support GLP-1-friendly product formulations.

**Let's move food forward – together.**

**Learn More**

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<sup>1</sup> Ardent Mills Proprietary Research

<sup>2</sup> Ardent Mills Proprietary Research, U.S. consumers 18+

<sup>3</sup> Ardent Mills Proprietary Research, U.S. consumers 18+

<sup>4</sup> Lindsay, Andrew, “Getting to Know GLP-1 Users, a New Kind of Consumer,” KPMG, 2024, <https://kpmg.com/kpmg-us/content/dam/kpmg/pdf/2024/glp-1-meds-impact-on-food-and-bev-ind.pdf>

<sup>5</sup> Lindsay, Andrew, “Getting to Know GLP-1 Users, a New Kind of Consumer,” KPMG, 2024, <https://kpmg.com/kpmg-us/content/dam/kpmg/pdf/2024/glp-1-meds-impact-on-food-and-bev-ind.pdf>

<sup>6</sup> “Can Certain Foods Impact Your Ozempic Side Effects?,” Cleveland Clinic, August 5, 2024, <https://health.clevelandclinic.org/ozempic-foods-to-avoid>

<sup>7</sup> Ardent Mills Proprietary Research, U.S. consumers 18+; among consumers currently on GLP-1s list provided; non-exhaustive

<sup>8</sup> Ardent Mills Proprietary Analysis/Research (considers 50 different eating/dietary behaviors)

<sup>9</sup> “UltraGrain® Whole Wheat Flours,” Ardent Mills, <https://www.ardentmills.com/media/m21n4jh/ultragrain-brochure-1.pdf>

<sup>10</sup> Ardent Mills Proprietary research, U.S. consumers 18+

<sup>11</sup> Any mention of third-party brands does not imply customer relationship to Ardent Mills

<sup>12</sup> “Conagra Brands Introduces Badges on Select Healthy Choice Products, Leading Consumers to GLP-1-Friendly Options,” Conagra, December 12, 2024, <https://www.conagrabrands.com/news-room/news-conagra-brands-introduces-badges-on-select-healthy-choice-products-leading-consumers-to-glp-1-friendly-options-prm-122909>