



# Closing the Whole Grain Gap: How Industry Can Drive Change

**17 March 2026**

# Who are we?

## About the organisation

**The Whole Grain Initiative (WGI)**, operating under the umbrella of the International Association for Cereal Science and Technology (ICC), is a global network of experts and organisations working together to drive **a worldwide shift from refined grains to whole grains**, unlocking the many health and sustainability benefits this transition brings.



# Who are we?

## Today's speakers:



**Mikkel Andersen**

Global CatMan and Lead on Health & Nutrition, Lantmännen Unibake International



**Ece Nevra Göncü**

Head of Nutrition, Regulatory and Scientific Affairs at Cereal Partners Worldwide (Nestlé & General Mills)  
President of CEEREAL



**Christophe Courtin**

Full professor and vice dean at the Faculty of Bioscience Engineering (KU Leuven), Laboratory of Food Chemistry and Biochemistry



**Caroline Sluyter**

Senior Director of Operations for Oldways and Program Director of the Oldways Whole Grains Council



**Carlos Abundancia**

Outreach Area Lead, EUFIC



**PART 1**

Why whole grains matter & why industry should care

**PART 2**

Sustainable Food Systems

**PART 3**

Public Health Demand

**PART 4**

Health & Nutrition is a consumer mega trend

**PART 5**

Growing institutional interest and supportive policy shifts

**PART 6**

What actions can the private sector take?

**PART 7**

Take the first step: join the Whole Grain initiative



# Why whole grains matter & why industry should care

**PART 1**

# The whole grain momentum is accelerating and **industry can shape it**

Whole grains are **increasingly recognised as essential to improving public health**, supporting sustainable food systems and creating economic opportunities.

The key drivers that make a strong whole grain market possible are already in place and together they create a major market opportunity for forward-thinking companies.

- Rising public health demand
- Consumers seeking healthier options
- Global shift toward sustainable food systems
- Supportive policies and dietary guidelines
- Growing institutional interest



**Market opportunity**

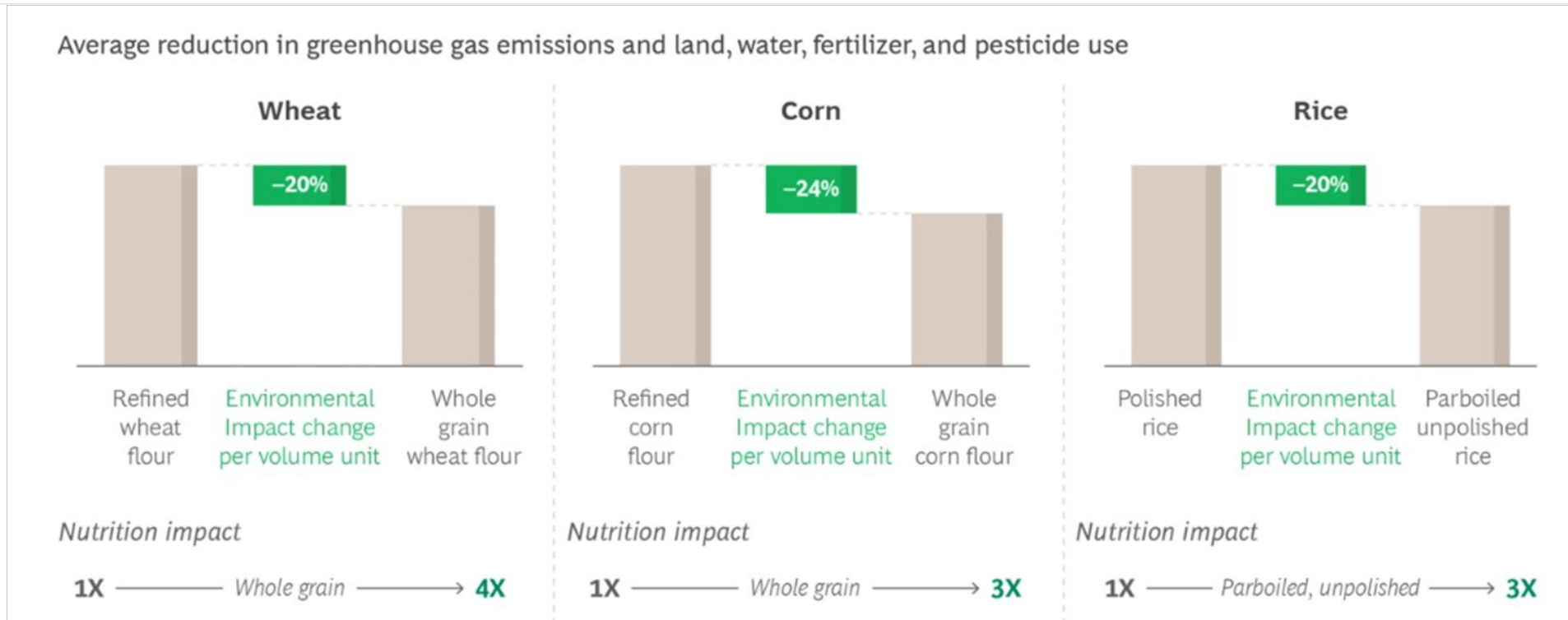


# Sustainable Food Systems

**PART 2**

# Whole grains offer more diverse nutrients with 20-24% less environmental impact

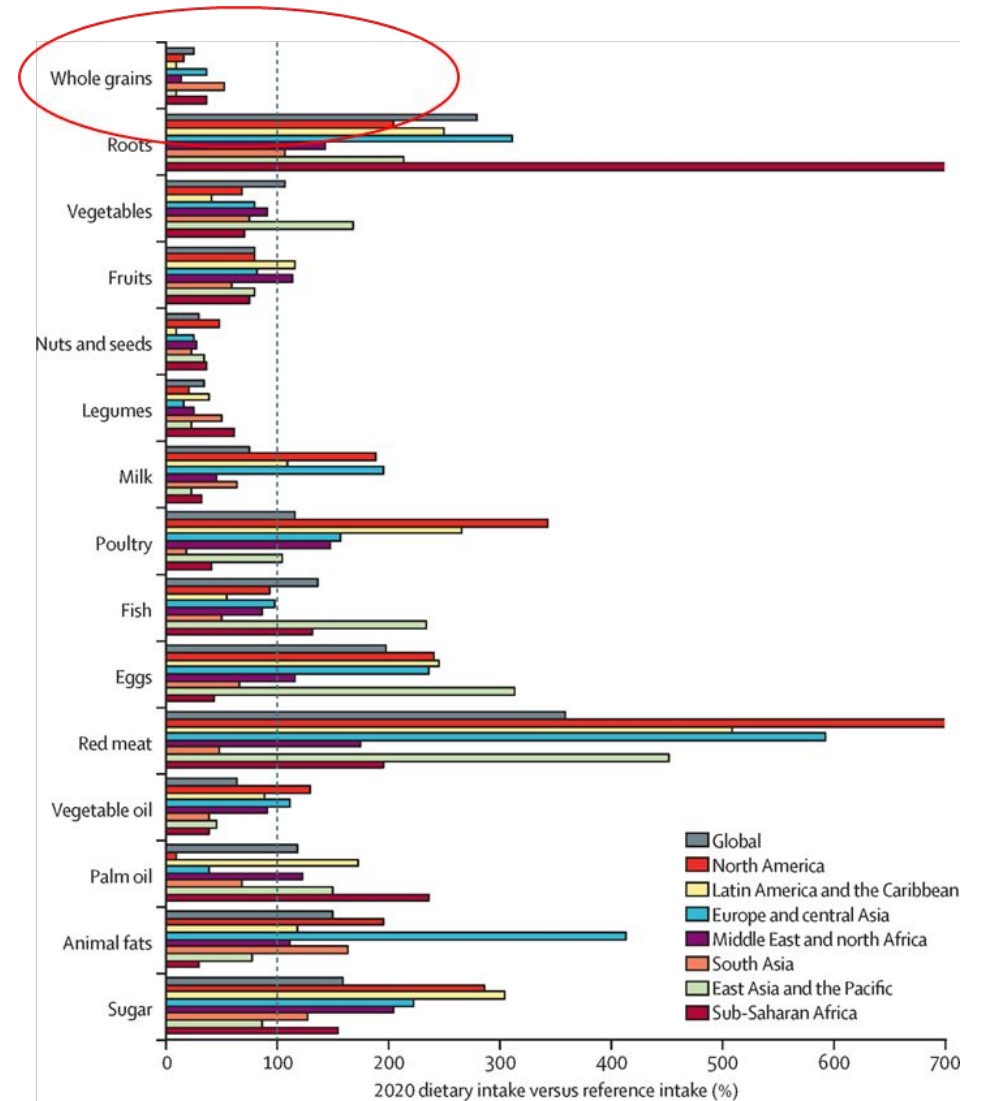
Whole grains contribute to climate-resilient food systems because they require less land, water, and fossil-based fertilizer inputs per volume unit compared with refined grains



# Sustainable diets rely on Whole Grain

## "EAT-Lancet Diet"

- A sustainable diet gets more of its calories from whole grains (32%) than from any other food group.
- A healthy, sustainable diet includes 210 g (dry weight) whole grains per day
- Increasing the production and provision of whole grain foods is required for shifting towards:
  - 1) healthy food patterns
  - 2) increased agricultural productivity
  - 3) reduction of food loss and waste





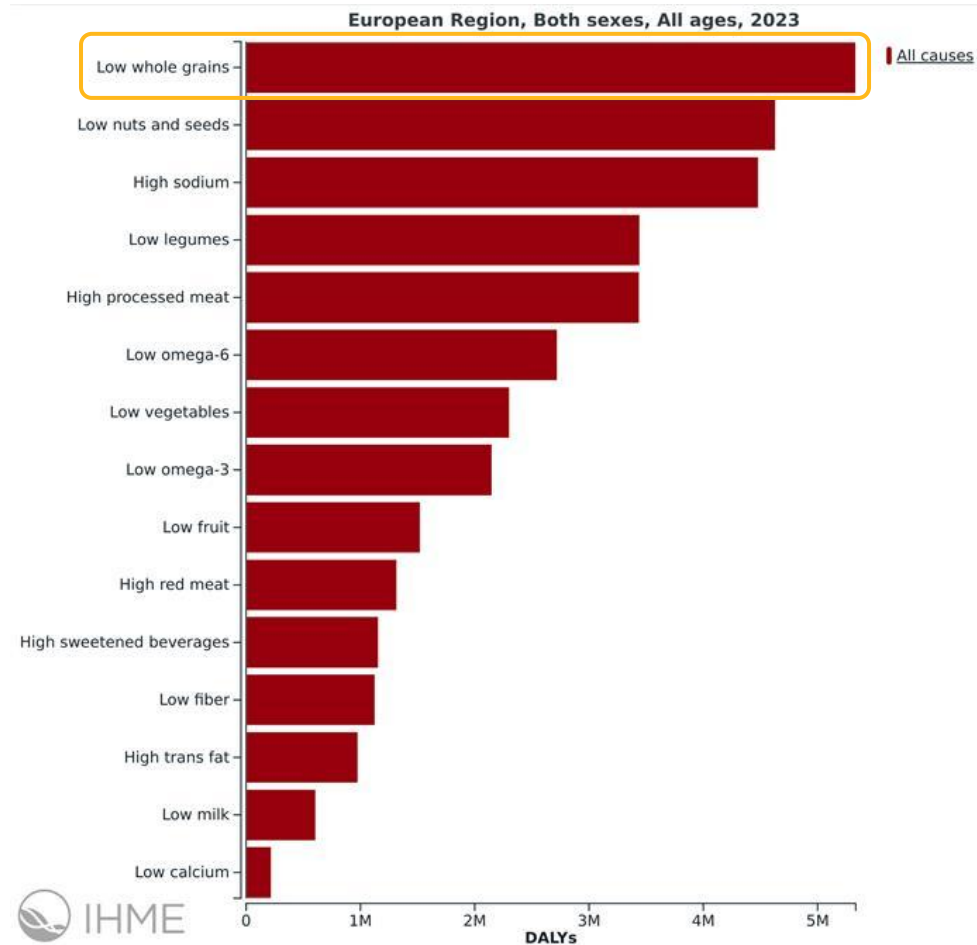
**Increasing the intake of  
whole grains worldwide would  
possibly prevent 11 million  
deaths per year.**



# Public Health Demand

**PART 3**

# Not eating enough whole grains is Europe's top risk factor for health

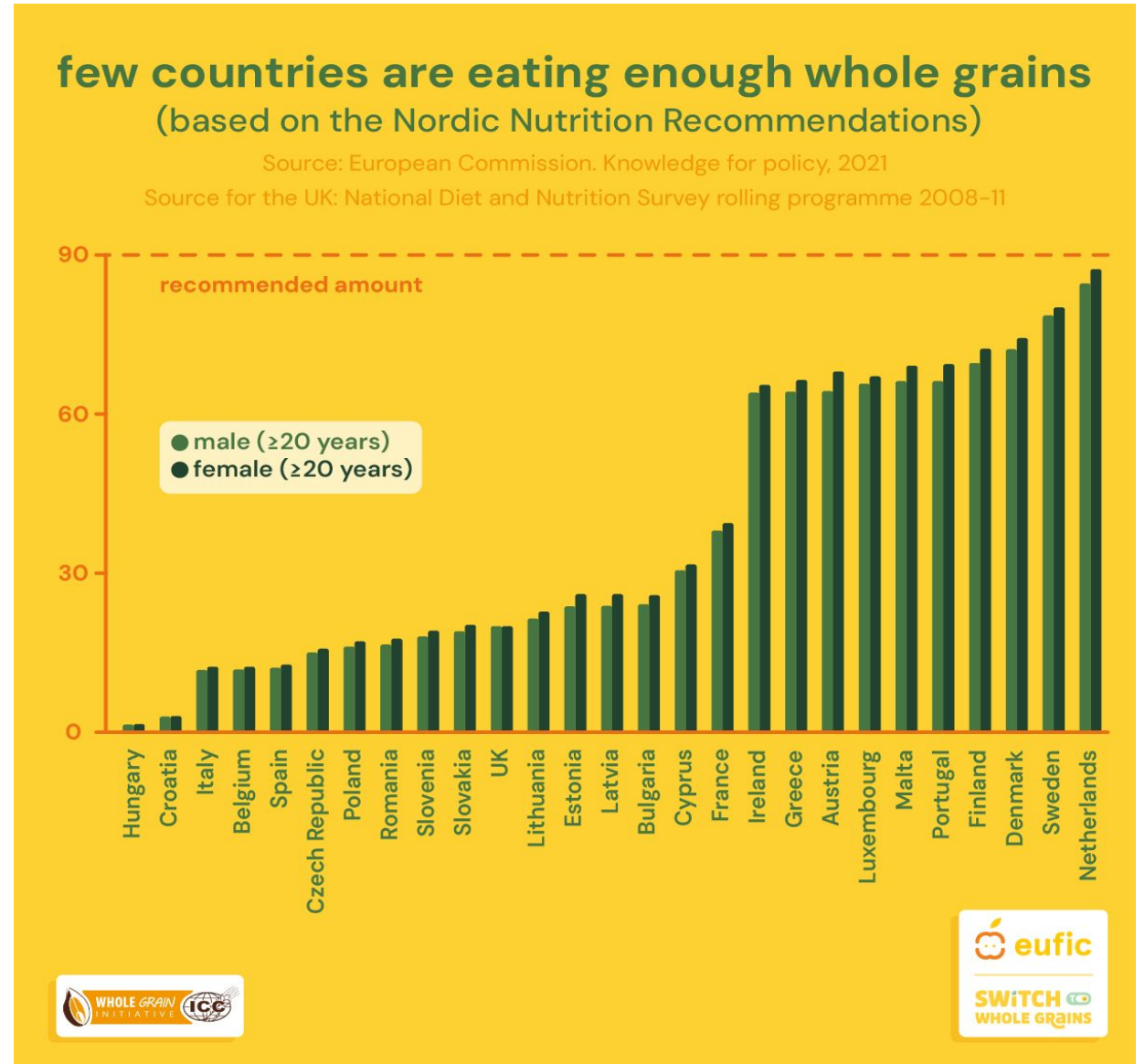


**“A diet low in whole grains was the most common leading dietary risk factor for deaths and DALYs”**

One DALY (disability-adjusted life year) represents the loss of the equivalent of one year of full health.

# Whole grains are missing from most plates

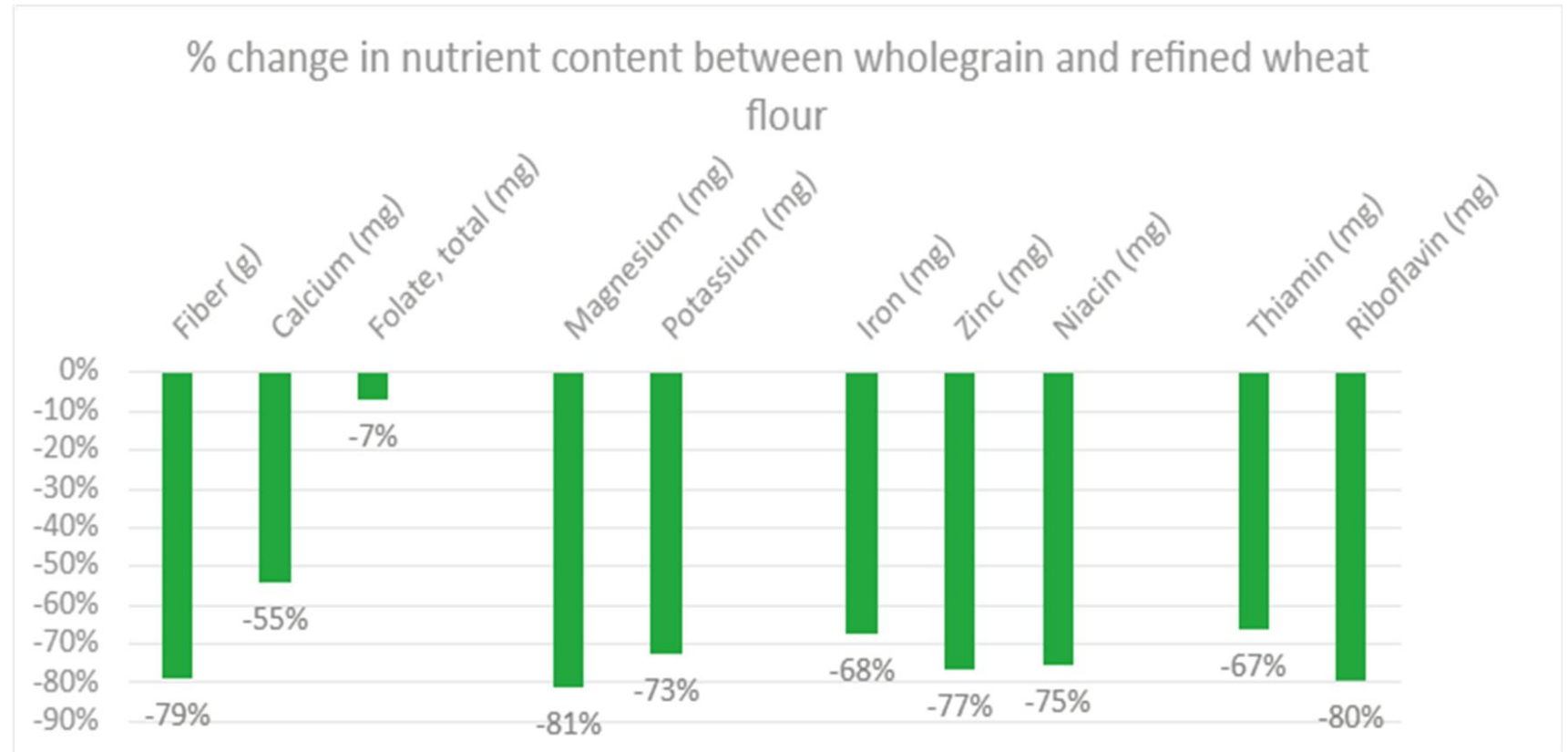
Most Europeans still fall short of the recommended **75–90 grams per day**, and in 16 out of 27 EU countries, consumption doesn't even reach half of that.



Source: European Commission, Knowledge for policy 2021  
Source for the UK: National Diet and Nutrition Survey rolling programme 2008-2011

# What happens when grain is refined?

Refining removes the bran and germ, the nutrient-rich part of the grain, leaving only starch and protein.



Source 1: Thielecke et al. (2021). Processing in the food chain: do cereals have to be processed to add value to the human diet? <https://doi.org/10.1017/S0954422420000207>

Source 2: U.S. Department of Agriculture, Agricultural Research Service. FoodData Central. Retrieved from <https://fdc.nal.usda.gov/>

# Benefits of Whole Grains Consumption

- **Source of B vitamins and minerals:** For energy and overall health
- **High in dietary fibre:** Supports digestion, promotes gut health, and may help reduce the risk of certain cancers.
- **Bioactive compounds:** linked to improved heart health, better metabolic function, and enhanced immune response.

Research suggests that consuming around 50 g of whole grains per day is associated with:



**~25%**  
lower risk of  
type 2 diabetes



**~20%**  
lower risk of  
coronary heart  
disease



**~3%**  
lower risk of  
colorectal cancer



**~12%**  
lower overall  
risk of death



Source: Reynolds et al., 2019



Source: Reynolds A et al. (2019). Carbohydrate quality and human health: a series of systematic reviews and meta-analyses. [https://doi.org/10.1016/S0140-6736\(18\)31809-9](https://doi.org/10.1016/S0140-6736(18)31809-9)



# Small dietary shifts - Big economic returns

Increasing whole-grain intake, even slightly, can translate into significant public health savings and reduced healthcare spending.

Four economic studies showed that increasing whole grain intake can lead to healthcare cost savings. <sup>1</sup>



**\$35.9 billion**

in savings due to reduced cardiovascular and coronary heart diseases



**AU\$1.4 billion**

in savings related to the treatment of heart disease and Type 2 diabetes



**€800 million**

in savings related to Type 2 diabetes over the next 10 years

Source 1: European Commission (2021). Supporting Policy with scientific evidence, Whole grain intake across European countries. [https://knowledge4policy.ec.europa.eu/health-promotion-knowledge-gateway/whole-grain-5\\_en](https://knowledge4policy.ec.europa.eu/health-promotion-knowledge-gateway/whole-grain-5_en)  
Source 2: Miller K et al. (2022). Nutrition economics: Four analyses supporting the case for whole grain consumption. <https://doi.org/10.1016/j.jcs.2022.103455>



# Health & Nutrition is a consumer mega trend

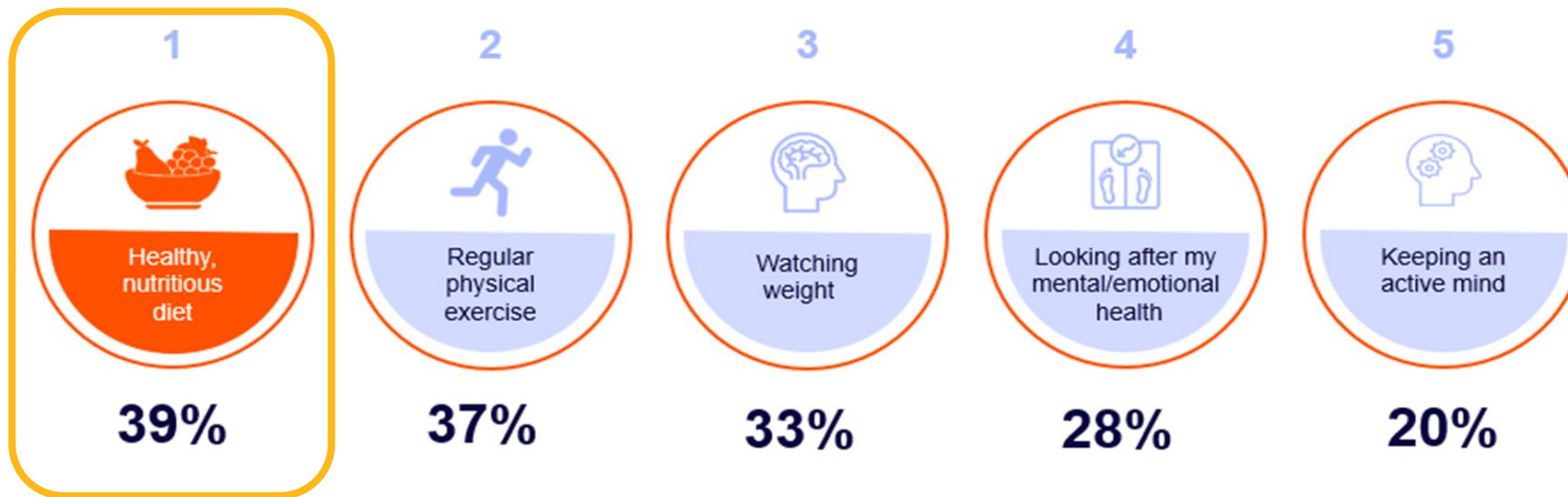
**PART 4**

# Consumers prioritize nutritious diets

## Diet and nutrition are central to healthier living

Consumers see adopting a healthy, nutritious diet as the #1 priority to living healthily. Engaging in physical exercise, weight management and looking after mental wellbeing are also highly important to healthier living for consumers.

Figure 1: Healthier living top five consumer actions

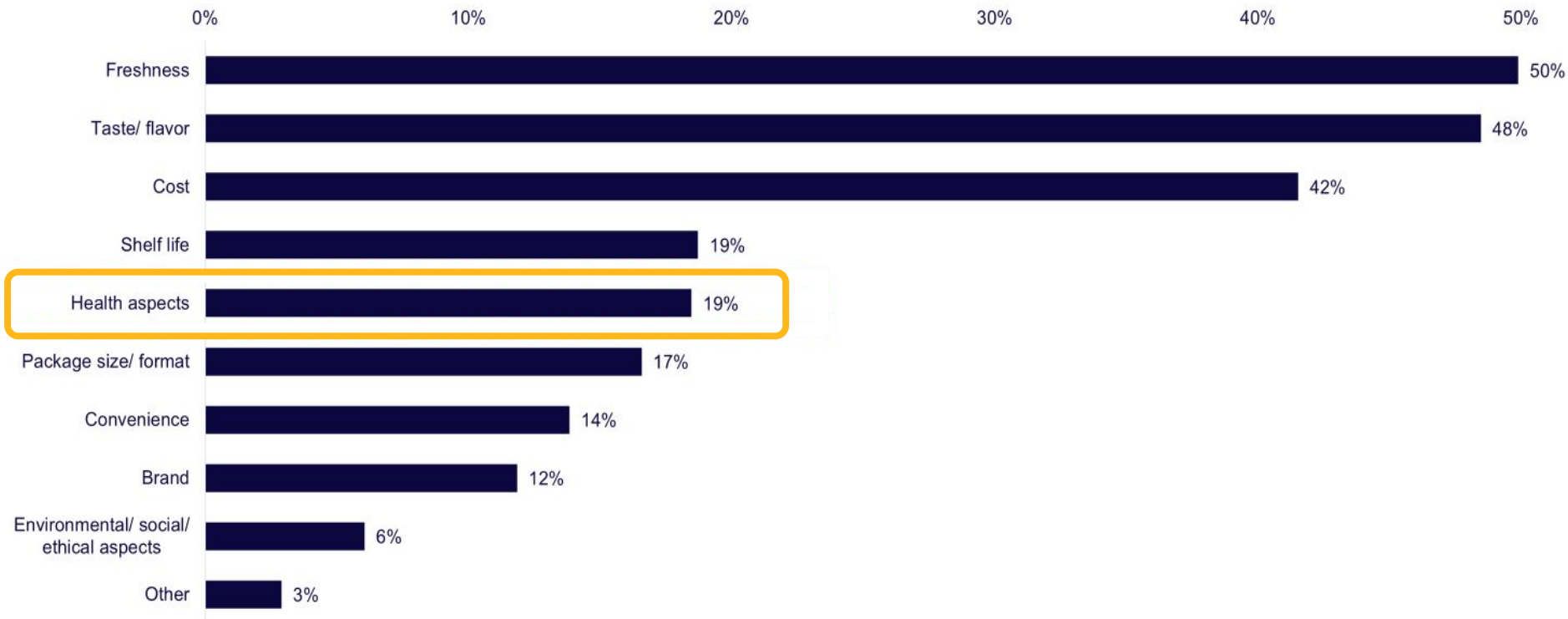


provided to chris.houston@lantmannen.com on 26 Feb 2025 07:03 (UTC)

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# Consumer choice is affected by healthiness

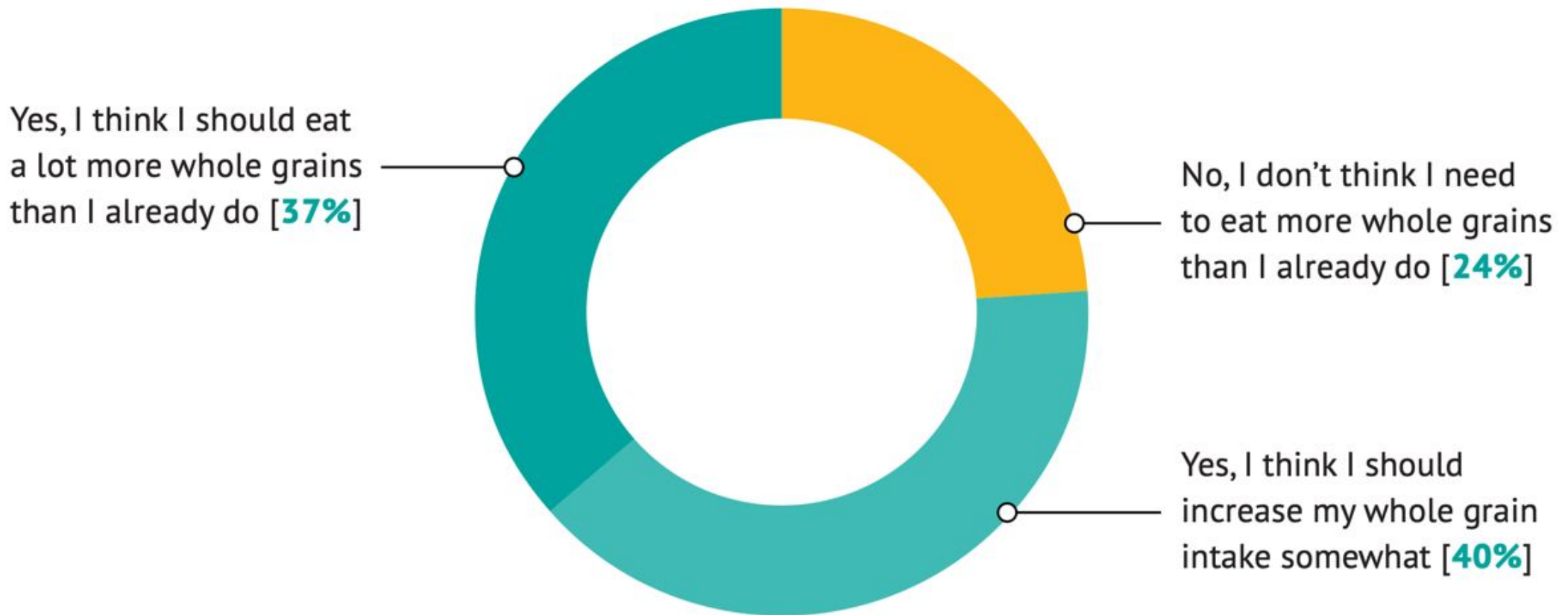
Figure : What product attributes most influence your purchasing decision when buying bread and bread products? Select up to five (Europe, 2025)



Sources: Innova Category Survey 2025 (Average: Denmark, Finland, France, Germany, Ireland, Italy, Netherlands, Poland, Spain, Sweden, UK), Innova Flavor Survey 2024 (Average: France, Germany, Spain, UK)

# More than **three quarters** of consumers think they should **eat more whole grains**

Percentage of consumers who believe they should increase their whole grain intake



90% MEA

89% EUROPE

88% SAM

85% APAC

80% NAM

## Whole grains & seeds = HEALTH APPEAL

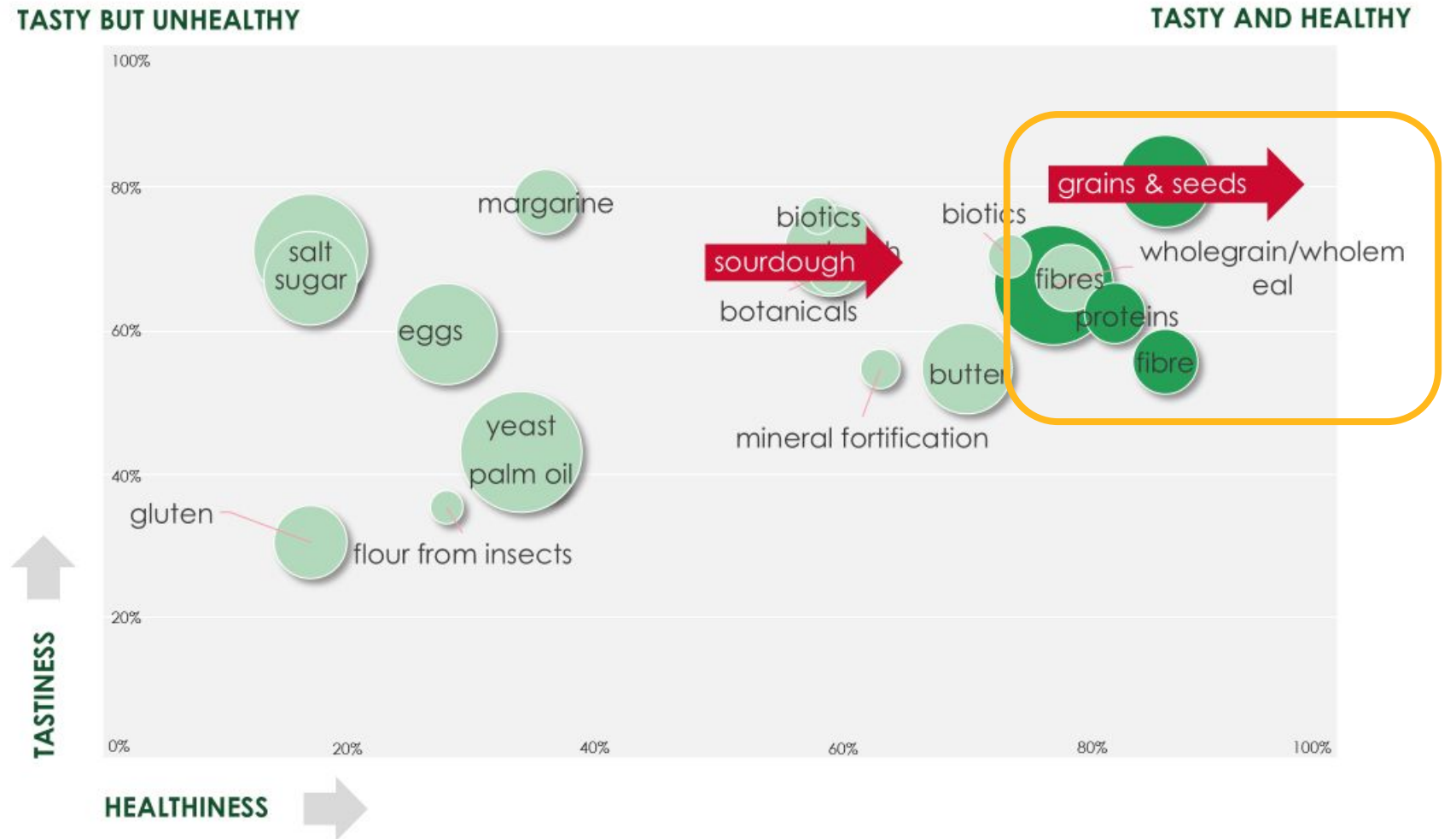


of consumers agrees  
– **whole grains & seeds are healthy**





Grains & seeds,  
wholegrain are  
power  
ingredients in  
bread



**A win-win: Whole grains combine healthiness and taste**

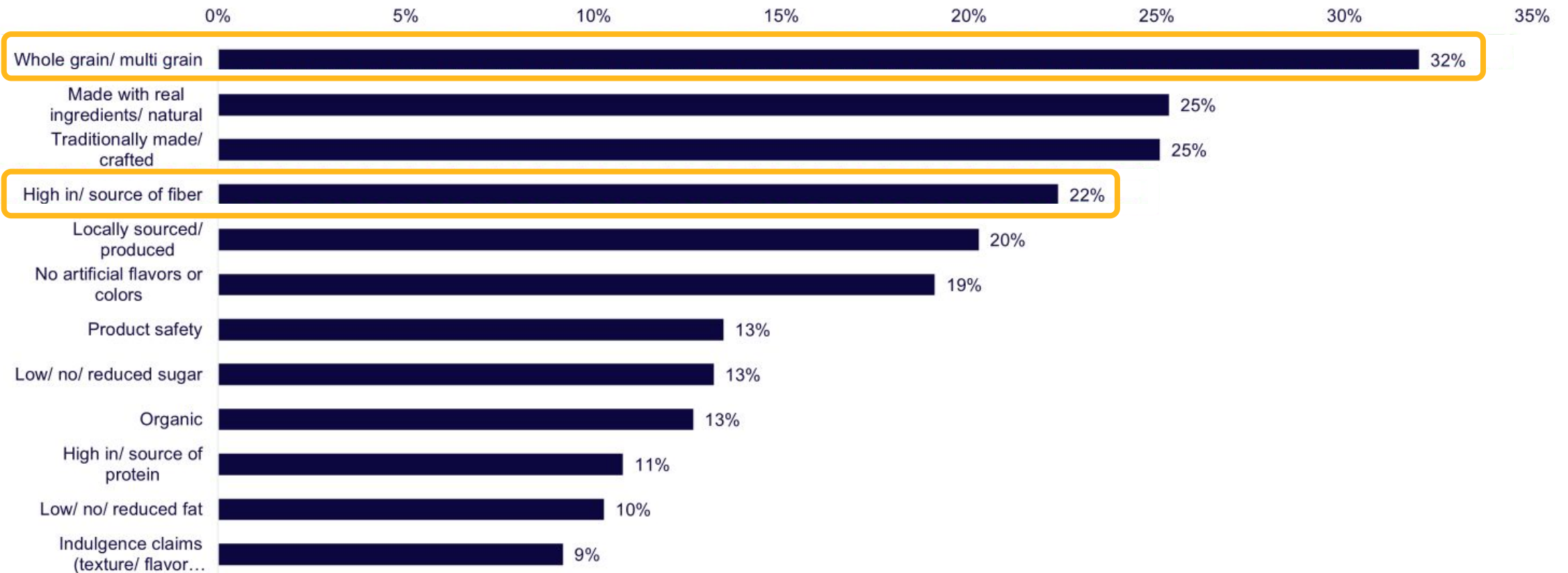
Source: Taste Tomorrow by Puratos - trends survey



believes **grains & seeds** add tastiness to baked goods

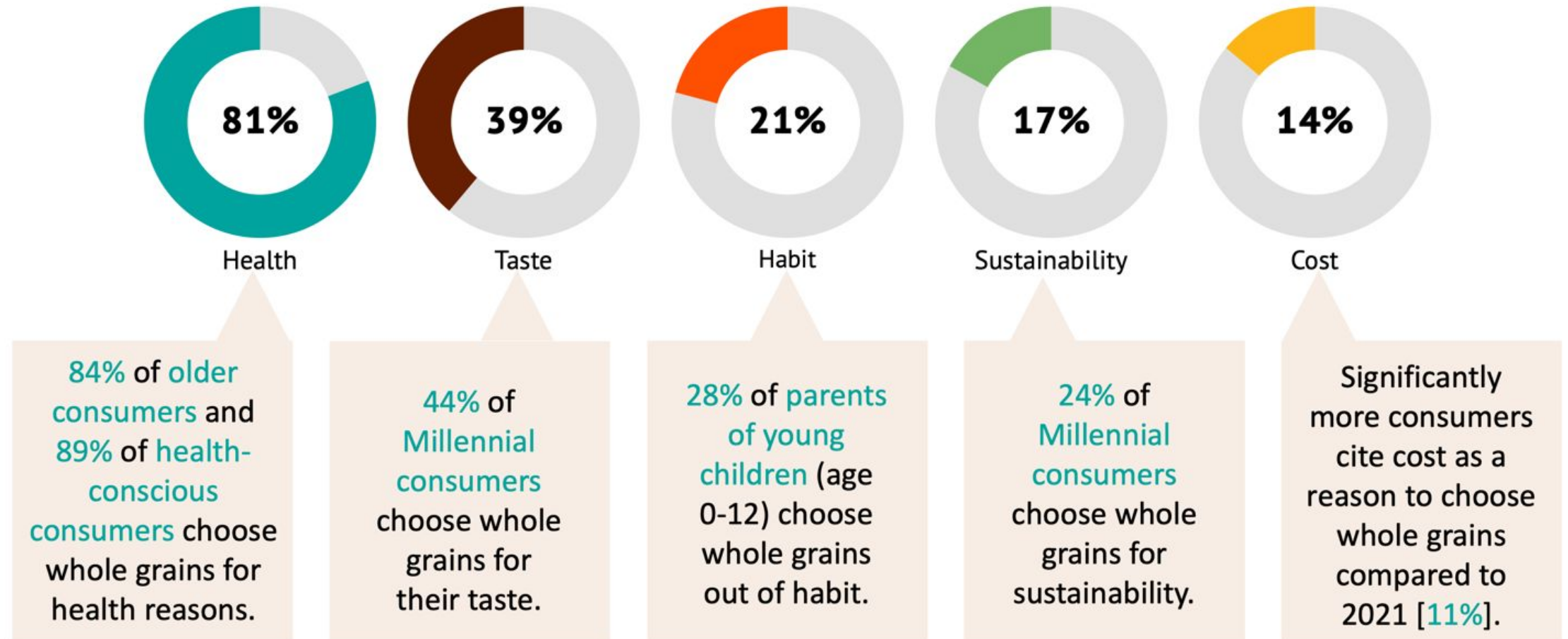


# Wholegrain/Multigrain are the most influential claims for bread



Source: Innova Category Survey 2025 (average: Denmark, Finland, France, Germany, Ireland, Italy, Netherlands, Poland, Spain, Sweden, UK)

# Health is the leading reason for choosing whole grains, but not the only one

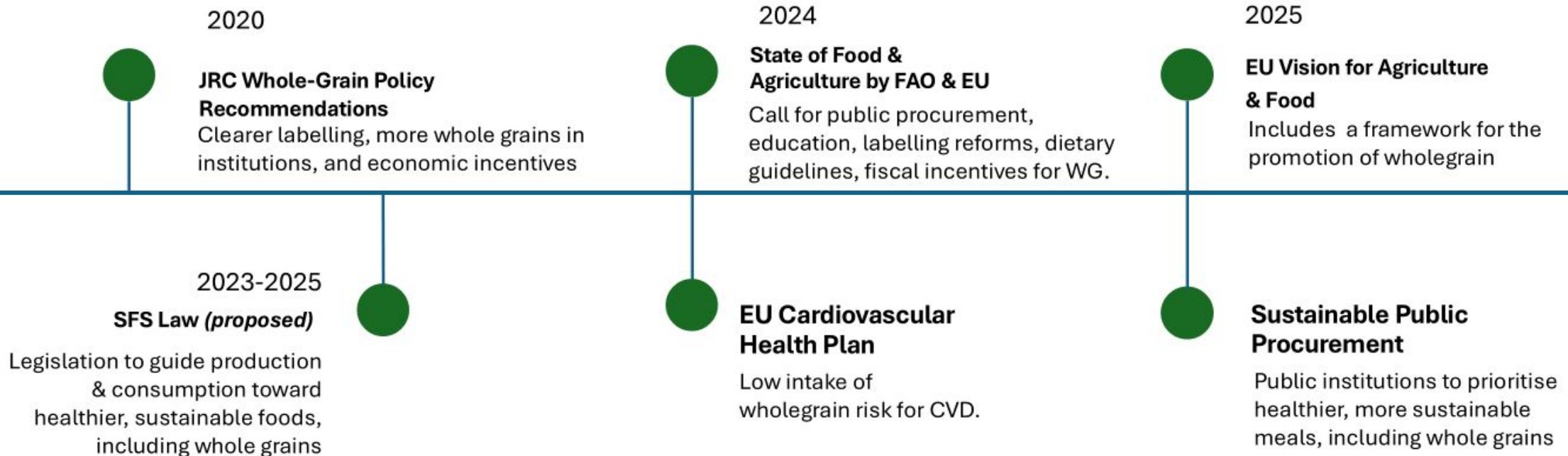




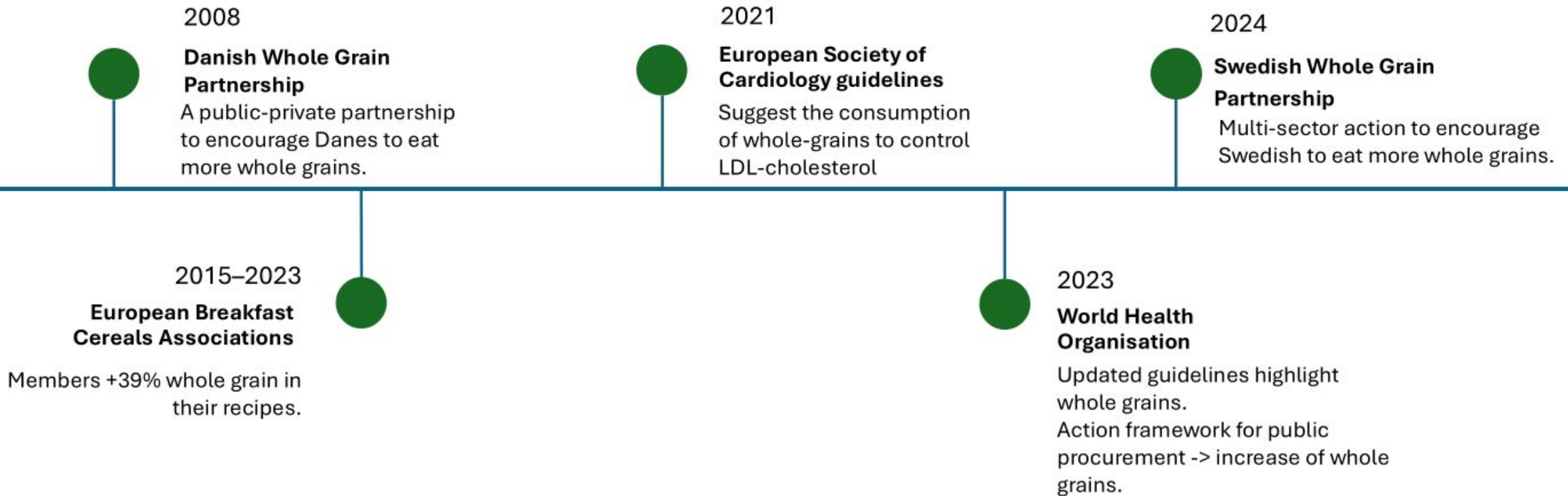
# Growing institutional interest and supportive policy shifts

PART 5

# Whole grains rising on the EU Policy Agenda



# Whole grain adoption driven by institutional commitment



# Whole grains in dietary guidelines (1/2)

## Nordic countries

"Eat **90g whole grains** per day and preferably more."



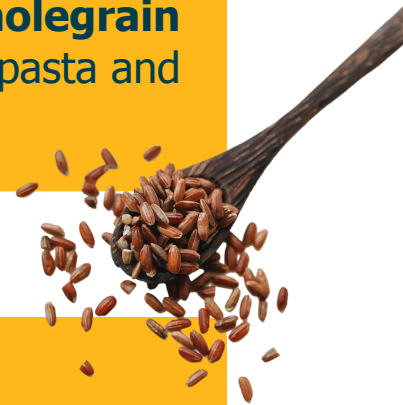
## EAT-Lancet Report

Recommends consuming **210g of whole grains** per day as part of a healthy, sustainable diet.



## Netherlands

"Consume mainly **wholegrain** products such as **wholegrain** bread, **wholegrain** pasta and brown rice."



## Singapore

"Consume two-three servings of **whole-grain** foods (or **50g** of whole grains) every day."



## USA

"**2-4 servings per day**, adjusting as needed based on your individual caloric requirements."

## China

"Daily consumption of total grains, cereals and legumes around 250-400 gram, among them around **50-100g** are coarse and **wholegrain.**"

# Whole grains in dietary guidelines (2/2)



## Ireland

"Wholemeal and **wholegrain** cereals are best."

## Canada

"Eat plenty of vegetables and fruits, **whole grain** foods and protein foods."



## Mexico

"Eat **whole grains** like tortilla, oatmeal, amaranth, rice, bread and pasta daily."

## Austria

"Prefer **wholegrain** products."



## Ghana

"Prioritise and increase consumption of fruits, vegetables, legumes and pulses, and **whole grains** as part of a varied diet."



## Germany

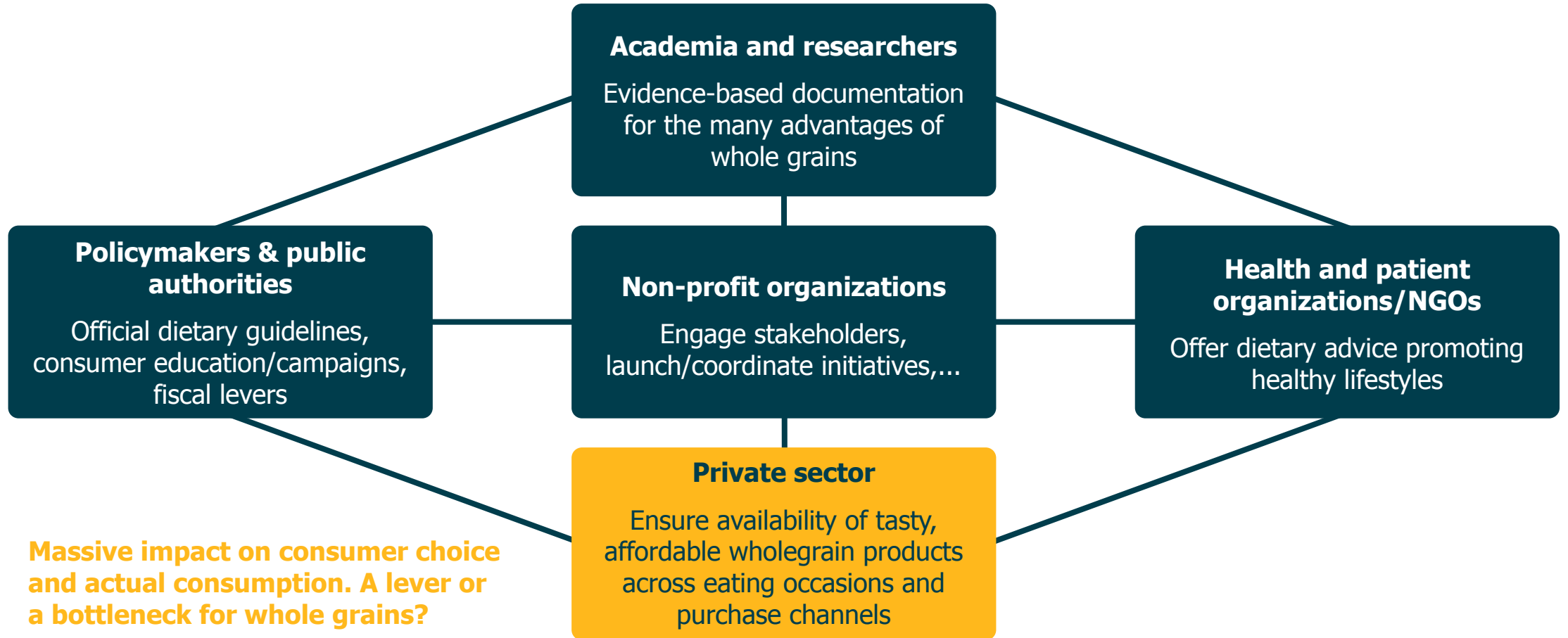
"Eat plenty of cereals, preferably **wholegrain** and potatoes."



# What actions can the private sector take?

**PART 6**

# Everyone has a role to play in the transition to whole grains



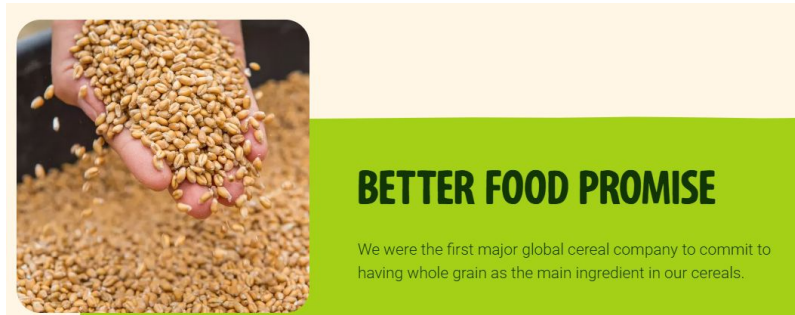
# What can the private sector do?

All parts of the commercial value chain can influence consumer choice and intake



\* And relevant national/regional associations

# Initiatives in the private sector



- Made **whole grain the #1 ingredient** in over **90%** of products.
- **Doubled whole-grain content** across brands while reducing sugar.
- Introduced the **green "Whole Grain" banner** to help consumers choose smarter.

**CRITERIA FOR: Food Groups to Encourage**

Food groups that have been well-established as contributing to healthier diets. They include:

- Fruit
- Vegetables
- Whole Grains
- Low Fat Dairy
- Nuts
- Seeds
- Beans, Peas & Lentils

**CRITERIA FOR: Nutrients to Encourage**

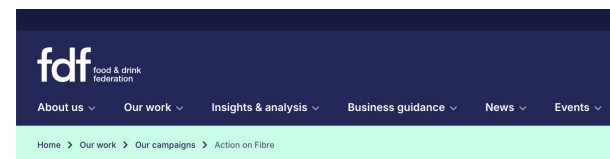
Nutrients that have been identified as being commonly under-consumed in a population. They are often called "shortfall nutrients". They may include:

- Iron
- Fiber
- Specific Vitamins and/or Minerals such as Calcium



## Fibre strategy

We are proudly the first retailer to announce a fibre strategy spanning our entire product offering, with two key targets: we plan to increase the tonnage of total fibre we sell by 20% by 2026 and boost the volume of wholegrains we sell to 25% of total grains by 2030.



# Initiatives in the private sector



**source of fibre**  
(3.8 g/ 37.5g serving)



**100% whole grain,**  
or 8 g of whole grain  
per serving



**Waarom zijn vezels belangrijk?**  
Vezels zijn van belang voor een gezonde spijsvertering.  
De aanbeveling (voor volwassenen) is om elke dag 30-40 gram vezels binnen te krijgen.

**Hoeveel vezels zitten er in mijn brood?**

 WEINIG VEZELS	 BRON VAN VEZELS	 RIJK AAN VEZELS
Minder dan 3 gram vezels per 100 gram.	3-6 gram vezels per 100 gram. Zaden en pitten bevatten veel vezels, daarom kan wit brood ook een bron van vezels zijn.	Meer dan 6 gram vezels per 100 gram. Zaden en pitten bevatten veel vezels, daarom kan bruin brood ook rijk aan vezels zijn.

**high fibre**  
(6 g/ 100g)

# Examples of good practices



**Kellanova**

- Reformulated its **European portfolio** to boost fibre by **122%**.
- Launched **new high–whole-grain cereals** like *Special K® High Fibre Granola* and *Oaties™* (55%+ whole-grain oats).



**Lantmännen**  
Cerealía

- Developed the popular **AXA family cereal range** with a strong focus on whole-grain content.
- **3 of 4 products** now carry the **Nordic Keyhole symbol**, confirming their healthy profile.



**Podravka**

- **Increased whole-grain content** by up to 50% in Lino and Čokolino ranges. Launched **O'Plant, a plant-based, fibre-rich cereal brand**.
- Promoted whole grains through **education campaigns**.
- Used whole grains as a **marketing** asset through **on-pack claims and advertising**.



**Brüggén**

- Adopted a **gradual reformulation strategy** across its cereal portfolio, increasing whole grains
- Reached **45% whole-grain content** in children's cereals by 2024.

# Why should the private sector care?

**Meet stakeholder expectations & Corporate Social Responsibility**



show leadership in responsibility & sustainability

**Tap into the health & wellness market**



align with consumer demand, differentiate and commercialise

**Stay ahead of regulation**



be part of the solution, not the target

**Be purpose-driven**

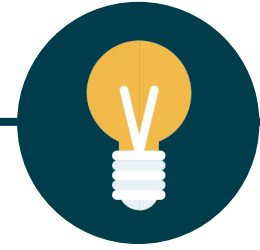


drive meaningful, visible impact towards sustainable food systems

**Enhance brand reputation**



lead a positive industry shift



**Those who lead now will help set the direction; those who wait will have to follow it.**

# Practical tool kit to support industry action

- To support these actions, FoodDrinkEurope and CEEREAL have developed a practical **toolkit** to help European breakfast cereal manufacturers increase whole grain content, support healthier diets and respond to evolving consumer expectations.
- The toolkit provides practical guidance to overcome technical challenges through best practices and incremental innovation.
- A similar toolkit for European baked goods manufacturers is under development





# Take the first step: join the Whole Grain Initiative

**PART 7**

# WGI Working Groups

No membership required!

## Food Policy

### Aims

Advocate for harmonized, coherent **food policies** promoting the consumption of WG including consensus on global definitions, national dietary guidelines and front-of-pack nutritional labelling.

### Chair



C. Avart  
(CPW, CH)

## Communication

### Aims

Create **messaging and strategies** around the promotion & education on WG & health to help capture consumer attention.

### Chair



C. Sluyter  
(Whole Grain Council, US)

## Processing, reformulation, and supply chain engagement

### Aims

Establish best practices for processing, motivate **industry** to join WG advocacy and commit to innovations.

### Chair



M. Andersen  
(Lantmännen Unibake, DK)

## Economic evaluation and affordability

### Aims

Give insight into the **economic impact** of WG and health care costs relative to increasing WG consumption beyond current levels.

### Chair



J. de Vries  
(Nutrition Solutions, NL)

## Asia-Pacific region

### Aims

Promotion of whole grain foods varieties in Asia-Pacific & **increasing consumption** of whole grain in Asia-Pacific.

### Chair



R. Hsu  
(China Grain products R&D Institute - TW)

## Special project on whole grain and sustainability

Look for external partners to help **develop expertise** in the area and define scope & objectives.

# Want to engage with the Whole Grain Initiative?

## Join a Working Group

Contribute your expertise and shape global whole-grain action.

## Stay informed

Subscribe to our newsletter for updates, insights, and opportunities.

## Be part of the conversation

Follow us on social media.

## Celebrate with us

Support and join the annual International Whole Grain Day celebrations.

Everyone can participate, just contact us at [office@wholegraininitiative.org](mailto:office@wholegraininitiative.org)

# Key Takeaways

1

**Whole grains matter for health, sustainability, and economic resilience.**

2

**Demand is there** driven by consumers, institutions, and global policy momentum.

3

**The science is clear.** Small increases in intake bring major public health and cost benefits.

4

**Private sector's role is essential.** Reformulation, innovation, communication, and collaboration make the difference.

5

**The WGI leads the way** bridging science, policy, and industry to turn vision into action.

## Take action to advance whole grains worldwide.

Drive change within your own organization, connect with a global network, contribute to working groups, access expert tools and insights, and help raise awareness both within your organisation and externally through International Whole Grain Day.

# Questions or comments?



**Thank you for  
your attention!**

**Phone:** [+43170772020](tel:+43170772020)

**Email:** [office@wholegraininitiative.org](mailto:office@wholegraininitiative.org)

# Why engage with the Whole Grain Initiative?



**Be part of the positive change and improving people's lives and future generations.**