



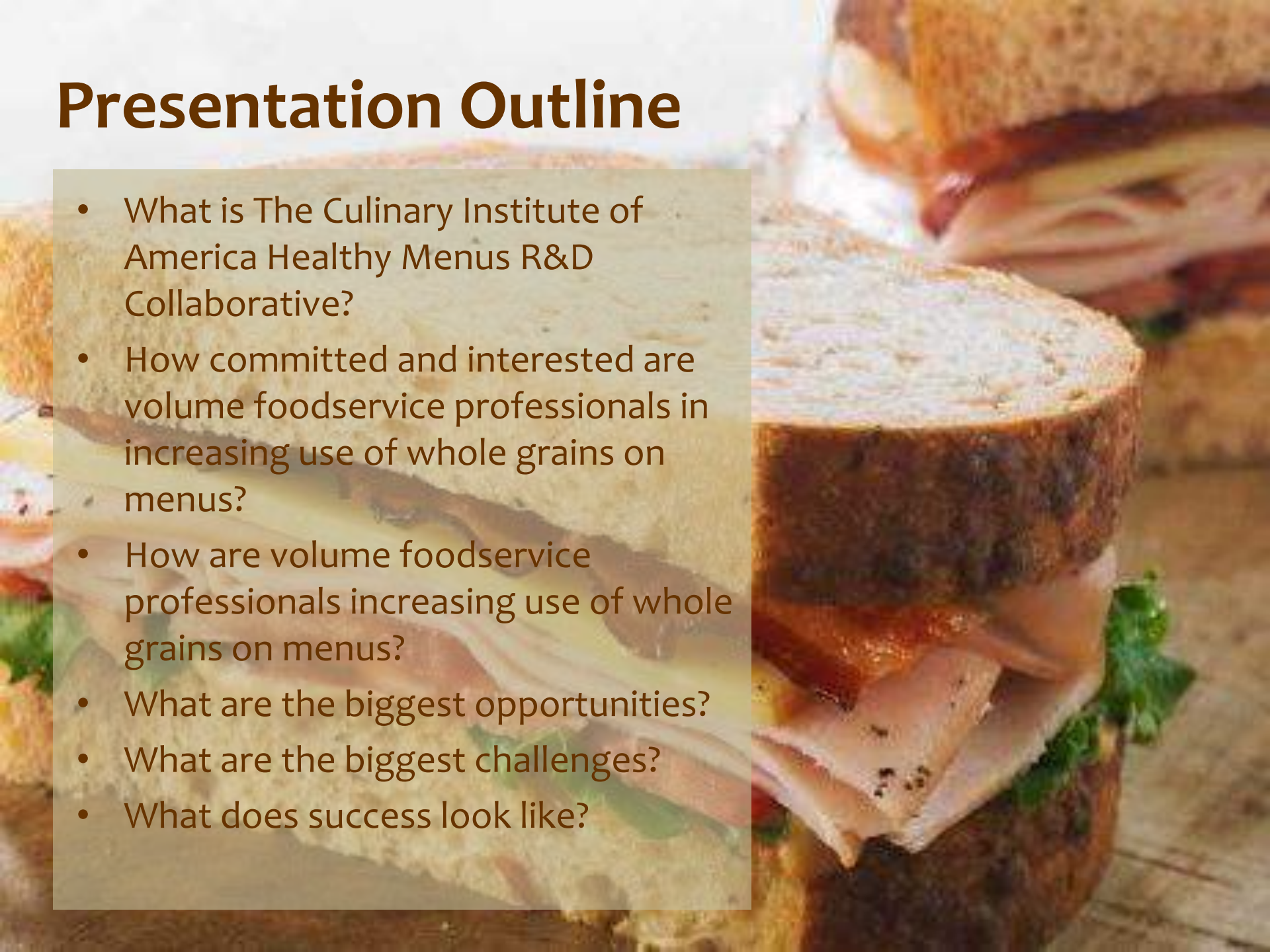
# Whole Grains in Volume Foodservice Operations

Challenges, Opportunities, and Success Stories

Amy Myrdal Miller, MS, RDN  
*President & Founder*  
Farmer's Daughter Consulting, LLC  
@AmyMyrdalMiller

# Presentation Outline

- What is The Culinary Institute of America Healthy Menus R&D Collaborative?
- How committed and interested are volume foodservice professionals in increasing use of whole grains on menus?
- How are volume foodservice professionals increasing use of whole grains on menus?
- What are the biggest opportunities?
- What are the biggest challenges?
- What does success look like?





## Healthy Menus R&D Collaborative

*Delicious Solutions for Changing Appetites*

## WHAT IS THE CULINARY INSTITUTE OF AMERICA HEALTHY MENUS R&D COLLABORATIVE?

- ➔ A CIA-led, membership-based initiative that brings together the best, brightest, and most influential culinary and nutrition R&D leaders from volume foodservice operations (chains, contract operations, campus dining) to collaborate with industry leaders, technical experts, manufacturers, and suppliers.
- ➔ The goal? Find practical, non-proprietary solutions that expand the availability and sales of menu choices that are nutritious, delicious, meet customer demand, and drive profitability.
- ➔ Why? Operator Members collectively feed more than 100 million Americans every day; small changes in menus can have BIG impact on public health.
- ➔ Areas of focus are those that the foodservice industry can impact most: sodium reduction, increasing use of fruits and vegetables, improving carbohydrate quality (with an emphasis on whole grains and beverages), and strategic calorie design. Future focus areas may include children's menus and fat quality.

### STRATEGIC PROCESS



### SUCCESS-TO-DATE





Healthy Menus  
R&D Collaborative  
*Delicious Solutions for Changing Appetites*

# MEMBER COMPANIES

as of June 30, 2015



# Whole Grains Benchmark Survey


## Objectives

- Measure the current **behavior** and **attitudes** about importance of whole grains on menus.
- Understand **perceptions** and **strategies** with regard to HMC member efforts to increase whole grains on menus.

Comparison data was also collected through a December 2013 omnibus survey from **321 foodservice operators** who do not participate in The Culinary Institute of America Healthy Menu R&D Collaborative.

## Methodology

- Online survey of CIA Healthy Menus R&D Collaborative members
- Fielded Nov-Dec 2013
- 25 of 32 volume foodservice organizations responded (78% response rate)
- Survey managed by Datassential, the CIA Healthy Menus R&D Collaborative research partner

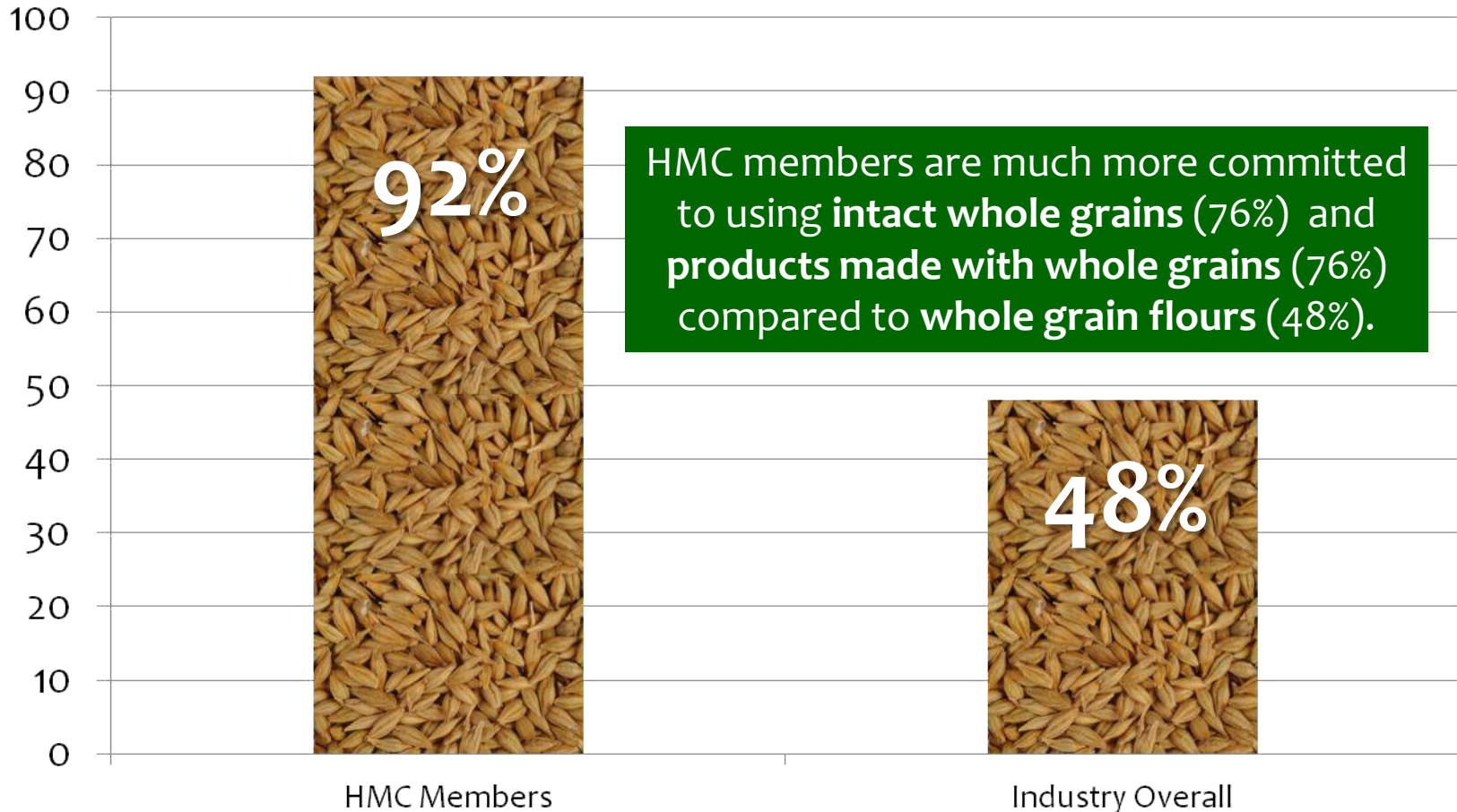


The focus on increasing whole grains is here to stay!

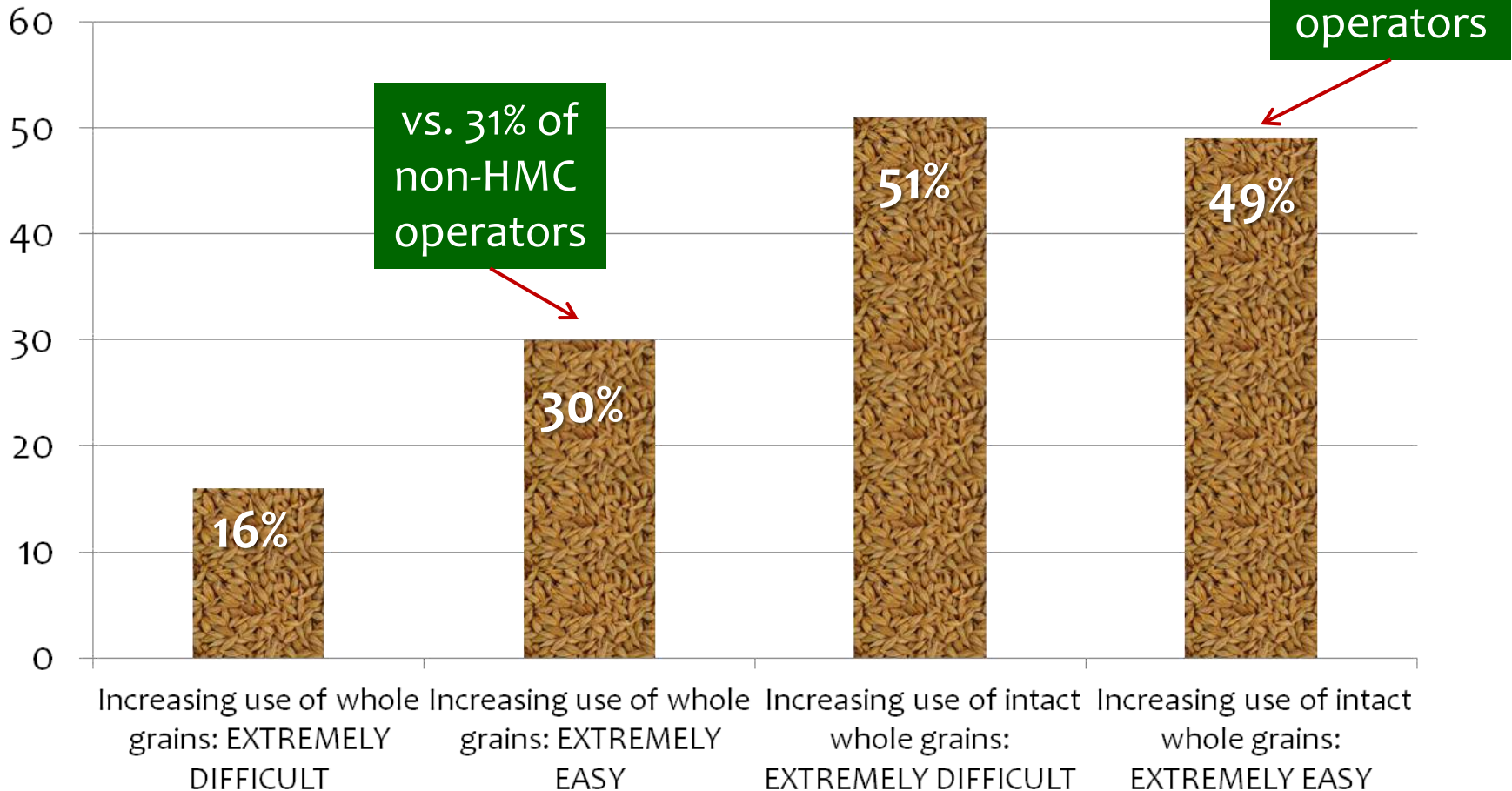
**100%**

of CIA Healthy Menus R&D Collaborative members believe the focus on increasing whole grains on menus is a **long-term trend** compared to 72% of foodservice operators overall.

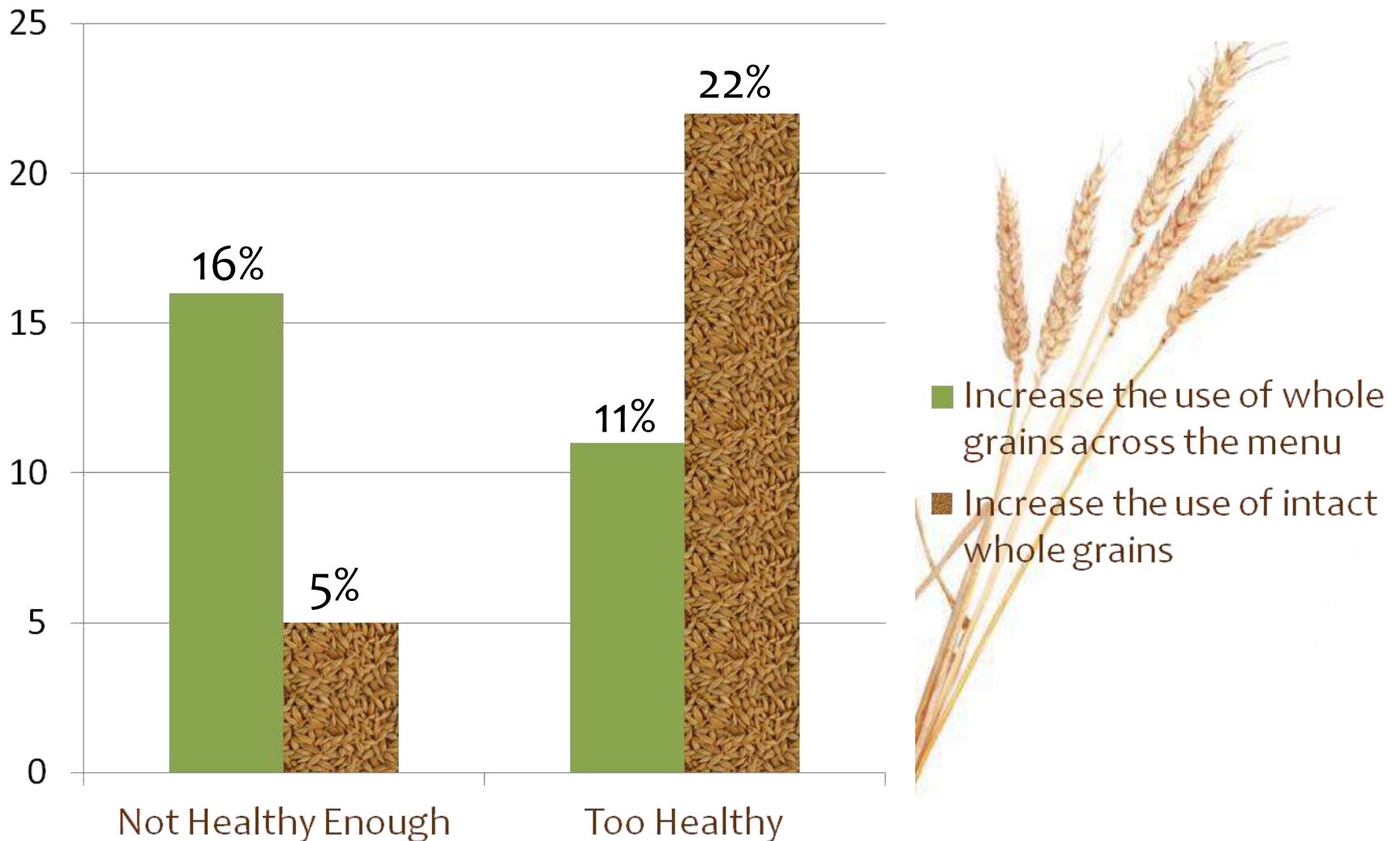
# Current or Future Whole Grains Plans



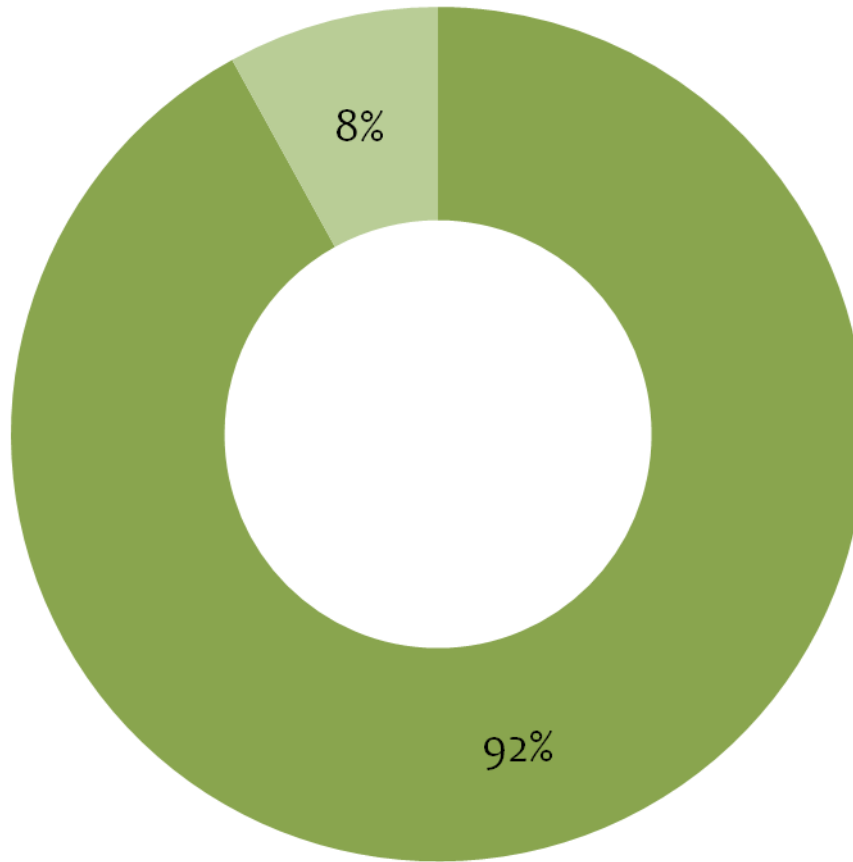
# Ease of Implementation



# Perception: Healthfulness vs. Customer Expectations



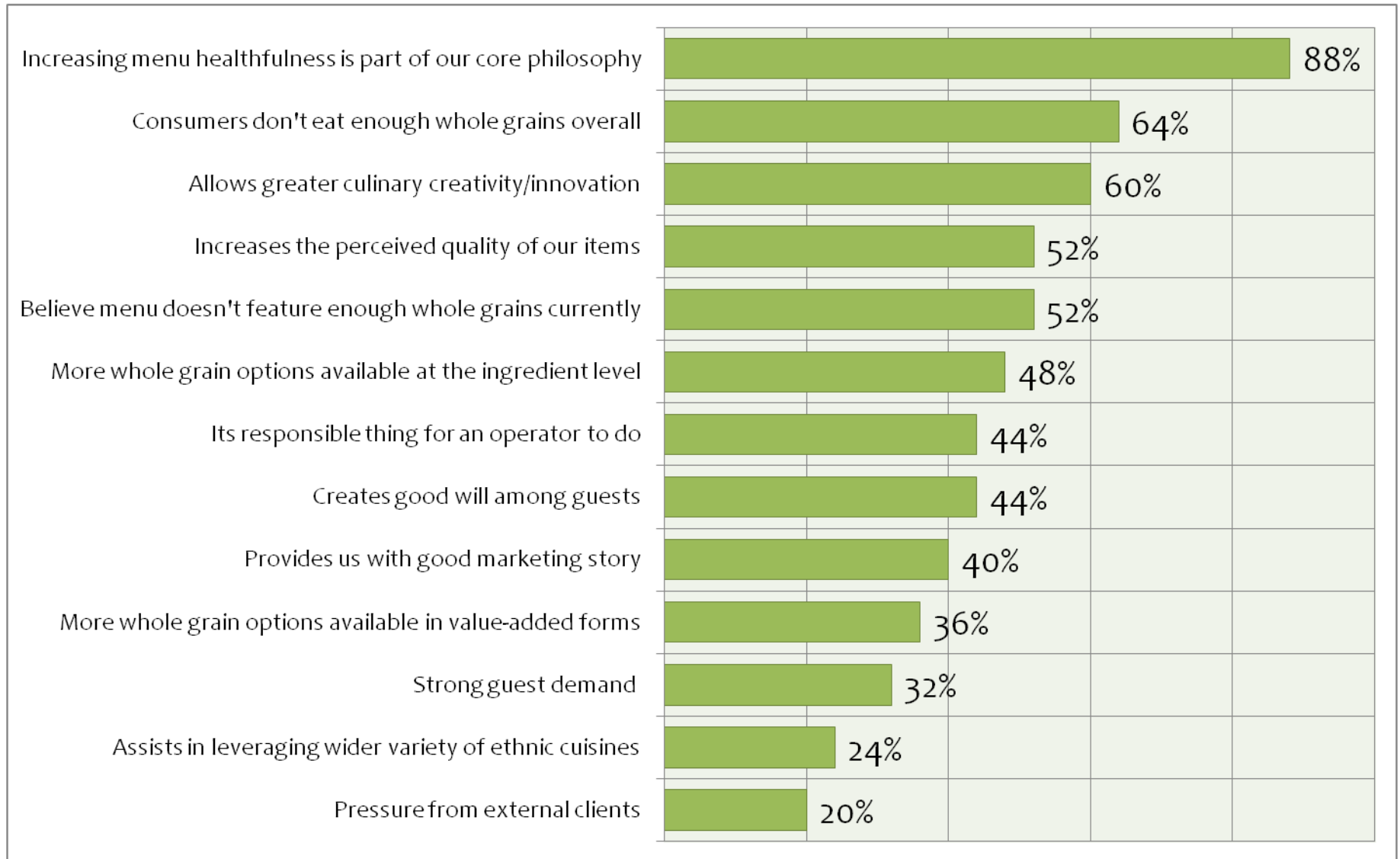
# Challenge: Food Costs\$



92% of respondents expect an **INCREASE** in food costs as a result of increasing whole grains across the menu. On average, costs are expected to increase 5%

STRATEGY for MANAGING INCREASED COSTS	
Expect to pass on SOME additional costs	48%
Expect to pass on ALL additional costs	13%
Do not expect to pass on any additional costs	39%

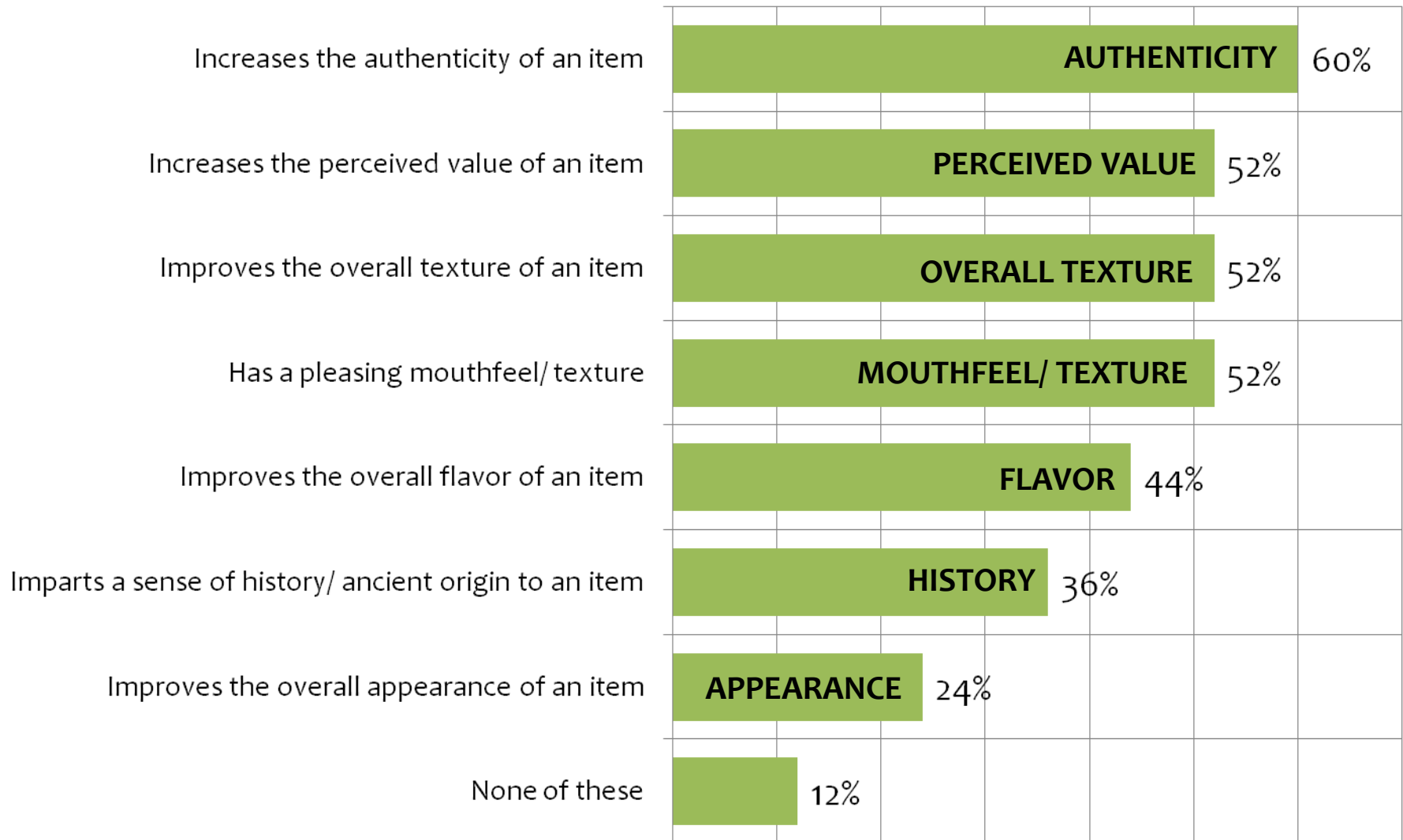
# Why Use More Whole Grains?



Source: The Culinary Institute of America Healthy Menus R&D Collaborative December 2013 Whole Grains Survey

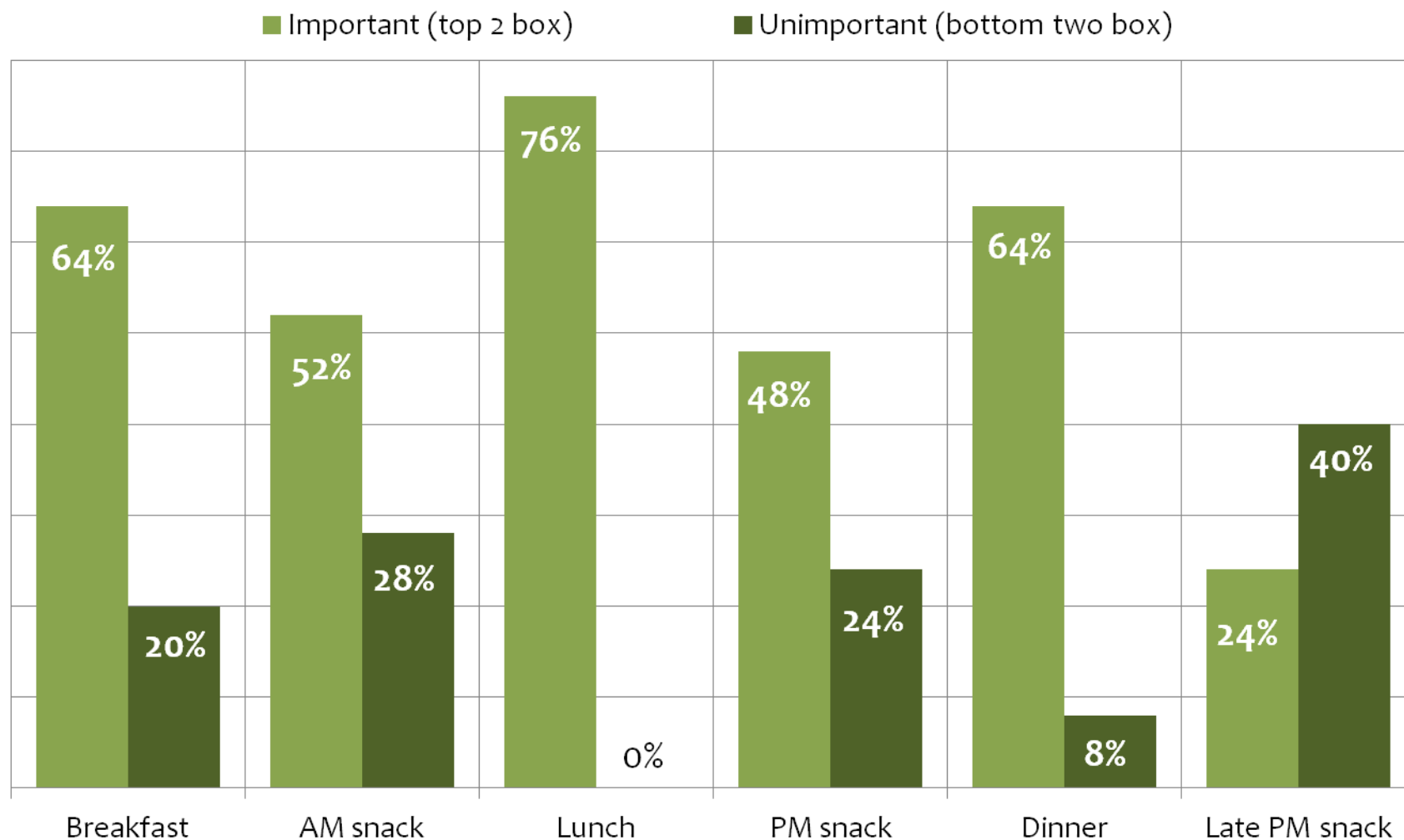
**Value**  
**Health** **CSR**  
**Innovation**  
**Creativity**

# Whole Grains Menu Development Benefits



Source: The Culinary Institute of America Healthy Menus R&D Collaborative December 2013 Whole Grains Survey

# Whole Grain Day Part Opportunities



Source: The Culinary Institute of America Healthy Menus R&D Collaborative December 2013 Whole Grains Survey

# Whole Grains at Breakfast



# McDonald's Egg White Delight McMuffin

## Egg White Delight McMuffin

Make your morning with 100%, freshly grilled egg whites, extra lean Canadian bacon and smooth white cheddar, stacked on a toasted English muffin made with **eight grams of whole grain**. An excellent source of protein and all that for 250 calories.



# Dunkin' Donuts Egg White Flatbread



## Start Your Morning Off Right

Grab a delicious veggie egg white omelet with a slice of reduced fat cheddar cheese, served on a **multigrain flatbread**. It's under 300 calories, and a great way to start your day.



Multigrain Flatbread: Whole Wheat Flour, Enriched Wheat Flour, Malted Barley Flour, Wheat Grains, Rye Grains, Oat Grains, Flaxseed, Rye Sourdough, Millet Seed, Teff Seed







# What About Intact Whole Grains?

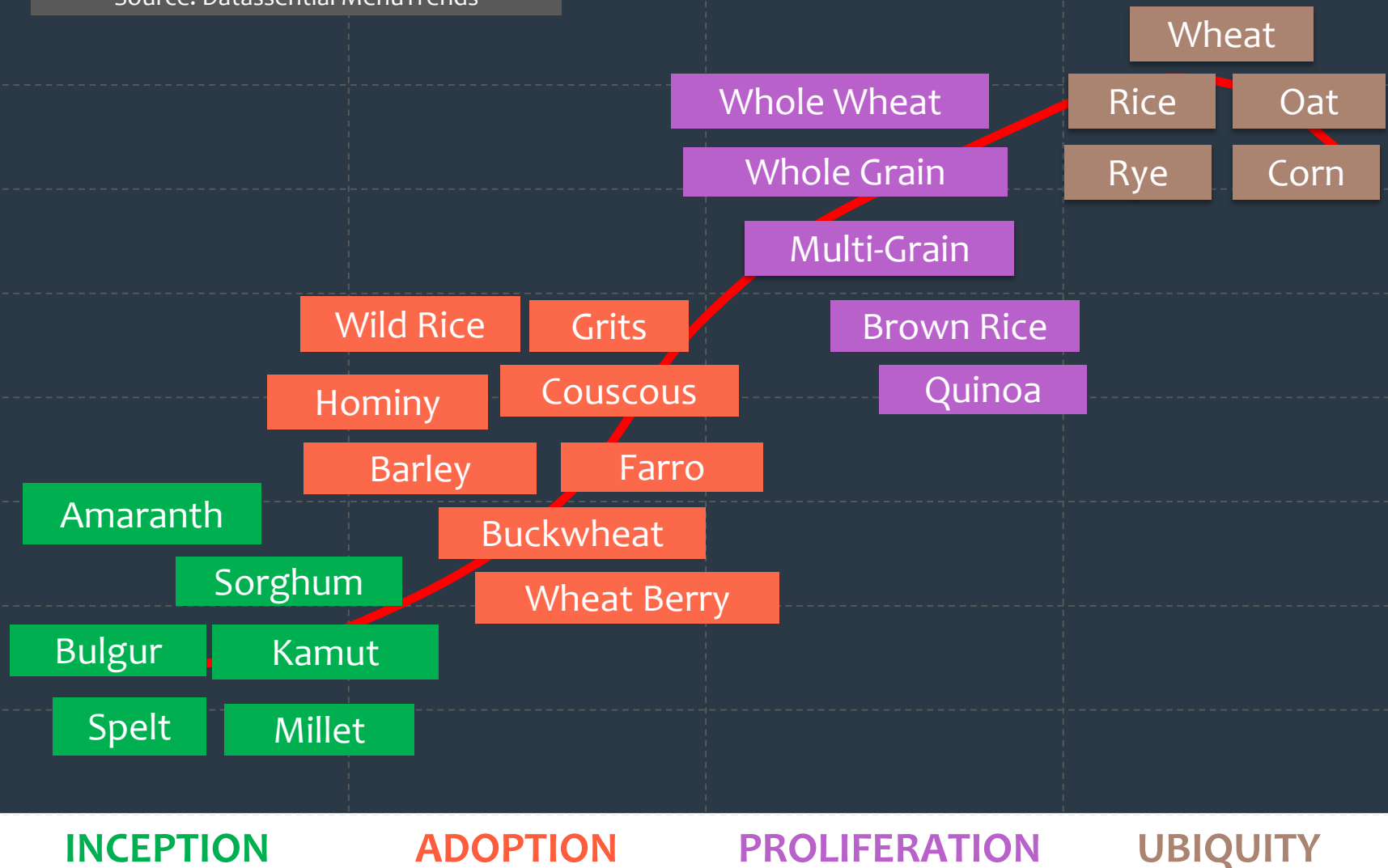
- Brown rice: **74%** *using or planning on using more*
- Wheat berries: **68%**
- Barley: **68%**
- Quinoa: **58%**
- Farro: **53%**
- Kamut: 26%
- Buckwheat: 22%
- Amaranth: 21%
- Spelt: 21%



# GRAINS

## Menu Adoption Cycle

Source: Datassential MenuTrends



# Top Grains on Menus = Rice and Corn

## GRAINS PENETRATION by Segment

**MENU PENETRATION**  
% of restaurants that  
offer \_\_\_\_\_.



	QSR	Midscale	Casual	Fine Dining	ALL
<b>Corn</b>	47.6%	65.4%	67.2%	57.8%	<b>60%</b>
<b>Rice</b>	38.9%	67.4%	68.8%	60.2%	<b>58%</b>
Wheat	26.3%	<b>36.3%</b>	27.8%	23.4%	29%
Rye	13.9%	<b>23.8%</b>	19.0%	15.9%	18%
Whole Wheat	13.1%	<b>19.9%</b>	13.6%	12.9%	15%
Oat	8.2%	<b>19.2%</b>	6.4%	15.0%	10%
Brown Rice	7.3%	<b>13.7%</b>	9.9%	4.5%	10%
Grits	2.7%	8.5%	8.6%	<b>16.8%</b>	7%
Multi-Grain	7.1%	8.1%	6.7%	6.9%	7%
Whole Grain	3.6%	5.8%	5.4%	<b>12.9%</b>	5%
Quinoa	4.3%	3.5%	6.6%	<b>11.1%</b>	5%
Wild Rice	2.3%	3.6%	5.4%	9.9%	4%
Couscous	1.9%	2.5%	3.6%	<b>15.6%</b>	4%
Barley	2.1%	4.0%	2.6%	3.3%	3%
Farro	0.8%	0.8%	3.5%	<b>13.8%</b>	3%
Buckwheat	1.0%	2.6%	2.0%	5.1%	2%
Hominy	0.9%	1.8%	2.2%	1.2%	2%

# The Rise of Quinoa and Farro

**GRAINS PENETRATION  
AND GROWTH:**  
by Time Trend

**MENU PENETRATION**  
% of restaurants that  
offer \_\_\_\_\_.



	PENETRATION					GROWTH RATE	
	2010	2011	2012	2013	2014	1 Year	4 year
Corn	60.1%	59.1%	59.9%	59.3%	59.7%	+1%	-1%
Rice	59.7%	59.4%	59.2%	58.0%	58.0%	-	-3%
Wheat	26.4%	27.2%	28.7%	28.8%	28.8%	-	+9%
Rye	19.4%	18.9%	19.2%	18.6%	18.1%	-3%	-7%
Whole Wheat	13.7%	14.5%	15.3%	15.0%	14.8%	-1%	+8%
Oat	9.9%	9.8%	10.1%	10.3%	10.4%	+1%	+5%
Brown Rice	7.4%	7.9%	8.4%	8.8%	9.5%	+8%	+28%
Grit	5.2%	5.3%	5.7%	6.5%	7.2%	+11%	+39%
Multi-Grain	5.7%	6.2%	6.4%	6.8%	7.1%	+4%	+25%
Whole Grain	3.9%	4.1%	4.3%	5.0%	5.4%	+8%	+39%
<b>Quinoa</b>	1.1%	1.5%	2.0%	3.6%	5.4%	<b>+50%</b>	<b>++++</b>
Wild Rice	4.2%	4.4%	4.5%	3.9%	4.3%	+10%	+2%
Couscous	2.8%	3.2%	3.1%	3.6%	3.6%	-	+29%
Barley	2.6%	2.7%	2.8%	2.8%	2.8%	-	+8%
<b>Farro</b>	0.7%	1.1%	1.4%	2.0%	2.7%	<b>+35%</b>	<b>++++</b>
Buckwheat	1.8%	1.9%	1.9%	2.1%	2.0%	-5%	+11%
Hominy	1.1%	1.1%	1.4%	1.6%	1.6%	-	+46%

# Challenges

“We introduced fried brown rice—and eliminated fried white rice—on the menu this week. Feedback is mixed. I am hoping as the cooks settle down, the quality of execution will improve and the comments will decrease. When it’s made according to the recipe, it’s delicious.”

**Chef Robert Deeds**, former Director of Product Development | Panda Restaurant Group | Monday, April 8, 2013

## FRIED RICE

Fried Rice is prepared with steamed brown rice that is tossed in the wok with soy sauce, scrambled eggs, green peas, carrots and chopped green onions.




☒ **VOTE**

FROM JULY 3 THROUGH AUGUST 31  
EVERY ORDER COUNTS



# The Next BIG Grain Trend?



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## Why You Should Try Sprouted Grains

All breads are not created equal. Those made with sprouted grains beat all the others.

You've heard that whole grain flour is better than processed white flour. But what about sprouted grains? Well, sprouted grains are certainly, but not as nutty grains as you might think. Here's why these earthy, nutty grains are a taste.

First, let's define sprouted grains. Basically, grains are the seeds of edible grasses such as wheat, rice, barley, spelt, and corn. Every



**"With sprouted grain, anybody who is 45 or older is going to raise an eyebrow and say, 'Hey, you're going hippie on us,'"**  
**said Tom Gumpel, VP of R&D at Panera.**

# What does success look like?





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