

# GRAINS AND RICE – US – 2023

To keep sales momentum and navigate the push and pull of rising food costs, it's time to rekindle consumer's appreciation for affordable, versatile grains and rice.



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# Grains And Rice - US - 2023

## This report looks at the following areas:

- Types of rice and grains purchased
- Rice/grain consumption frequency
- Rice/grain occasions and uses
- Important rice and grain product features
- Rice/grain associations
- Rice/grains attitudes and behaviors
- Market size and forecast and segment performance for grains and rice

## Overview

After a few years of performance peaks, dips and rebounds, the grains and rice market is expected to settle into slowed growth consistent with pre-pandemic sales through 2028. While affordability, adaptability, durability and convenience are the catalysts for increased sales, brands will need to double down focus on taste, enjoyment and nutrition to keep consumption and the sales momentum going.

For brands, any time, anywhere messaging can be a good start in reminding consumers that not only do most grains and rice pair nicely with other foods, flavors and tastes, but also day parts too.

The continual expansion of global cuisines and consumer interest in flavor exploration is a strong sign for the category's ongoing relevance. Rice and grains are foundations of international cuisines and foods, suggesting that brands can play a role in fueling exploration,



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especially among Gen Zs and Millennials, through social strategies that encourage and inspire versatile and diverse applications.

While families are an important piece of the puzzle, a need to appeal to solo occasions is salient: 48% of US consumers eat their main meal of the day alone at least most of the time. Adaptable recipes and applications, especially in leftovers and meal/snack planning, can be the first step in shifting mindsets and growing habits.

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# Report Content

## EXECUTIVE SUMMARY

- What you Need to Know
- Consumer trends: key takeaways
- Grains and rice's wild ride about to end
- Market Predictions
- Continued slow growth expected ahead
- Opportunities
- Grains and rice settle back to slowed growth

## CONSUMER INSIGHTS

### Consumer Fast Facts

#### Types of rice and grains purchased

- Small rise in instant and flavored options point to need for convenience and excitement
  - Graph 1: trended rice/grains purchased, 2021-23
- Younger adults driving small shifts seeking nutrition forward options
  - Graph 2: grains and rice purchase, by generation, 2023
- Parenthood, larger households ramps up variety
  - Graph 3: repertoire of rice/grains purchased, by generation, 2023
- Convenience and flavor cues can make rice/grains something consumers look forward to
  - Graph 4: repertoire of rice/grains purchased, by attitudes and behaviors, 2023

#### Rice/grain occasions and uses

- Position rice/grain versatility as a gateway to new uses, occasions
  - Graph 5: grains and rice occasions and uses, NET, any grains/rice, 2023
- Position rice/grain versatility as a gateway to new uses, occasions
- Gen Z, Millennials ready for new ways and times to enjoy rice and grains
  - Graph 6: grains and rice occasions/uses by generation, 2023
- Hybrid workers are ripe for versatile ideas, options that work at home and away
  - Graph 7: rice/grains occasions, by work location, 2023

#### Consumption frequency

- Framing grains and rice as more than a meal foundation can keep the party going
  - Graph 8: consumption frequency of rice and grains, 2023

### Important rice and grain features

- Consumers want new ideas that don't complicate prep, yet deliver on taste
  - Graph 9: important grains/rice features, 2023
- Flavored mixes can also be versatile
- Cast the widest net with taste, price and convenience for rice...
- ...and BFY cues for grains
- Non-parents looking for guidance, brands and whole grains
  - Graph 10: important grains features by parental status, 2023
- Leverage whole grain versatility to draw audiences of all ages

### Rice and grains perceptions

- Lots of room to build on and redefine product identity
  - Graph 11: rice and grains perceptions, 2023
- Explore the sweet side to inspire new, exciting applications
- Tap influencers and use social to meet target closer in opportunities: breakfast, lunch and snacks
- Lots of room to build on and redefine product identity

### Grains and Rice Attitudes and Behaviors

- Give rice/grain users tools to build on habits, not break them
  - Graph 12: grains/rice attitudes and behaviors, 2023
- Give rice/grain users tools to build on habits, not break them
- Enhance routines with customization, cooking support and convenience
  - Graph 13: rice and grains attitudes and behaviors, by generation, 2023
- Commuting workers aren't the only ones ripe for routine shake-ups
  - Graph 14: rice and grains attitudes and behaviors, by work location, 2023

## COMPETITIVE STRATEGIES

### Brands go global to diversify and meet changing needs

- Private label brands lean into regional and international flavors/ingredients
- Flavor, convenience and health meets a trifecta of needs
- Global tastes can push occasion and meal part boundaries

### Brands turn to social to inspire more diverse use

- Brands get creative, clever to move rice/grains around the "menu"

### Keep your eye on parents, but don't forget about everyone else

- Solo occasions may be more common than you think
  - Graph 15: food tracker frequency of flavors 2023



- Cherish the Family

## Marketing and advertising

- Brands wear their values on their sleeve
- Brands shift the focus to BFY benefits with guidance

## THE MARKET

- Market context

## Market size and forecast

- Rice and grains will cool following wild ride since 2020

## Market drivers

- Market signals both push and pull grains and rice
- Record-high temperatures in the US, Europe, and Asia risk crop productivity and global supply
- Consumers remain conservative about their financial health, keeping at-home occasions strong
  - Graph 16: personal assessment of financial health, 2022-23
- Despite softening inflation, elevated food prices make grains/rice a means to stretch food budgets, satiety
- Most consumers will bulk up to save rather than cut back
  - Graph 17: ways consumers save money on food and drink, 2022-23
- Rice/grains can offer accessible cultural immersions through taste
  - Graph 18: attitudes and behaviors with global cuisines, 2023
- Rising global cuisines are a canvas for brand and consumer exploration
  - Graph 19: consumption of global cuisines, 2022-23

## Market segmentation

- Dry rice and RTS segment success signal that both value and convenience are on the menu
- Dry rice and RTS performance pull ahead of mixes

## Market share/brand share

- Strong year for leaders barely moves the brand share needle
- Strong sales performances...
  - Graph 20: grains and rice company sales, 2022-23
- ... still eclipsed by private label share growth
- PL and smaller leading brands show both ends of the dry rice segment...
- ... still, dry rice segment remains top heavy
- Untapped potential for dry rice mixes
- Store-brand sales suggests rice mix segment is a "downgrade" from other foods, upgrade to its brands
- The power of brand is strong with RTS
- Multi-outlet sales of ready-to-serve rice, by leading companies and brands, rolling 52 weeks 2022 and 2023

### APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Total US sales and forecast of rice and grains, at inflation-adjusted prices, 2018-28
- US sales and forecast of dry rice, at inflation-adjusted prices, 2018-28
- US Sales and Forecast of Dry Rice Mixes, at Inflation-adjusted Prices, 2018-28
- US sales and forecast of ready-to-serve rice, at inflation-adjusted prices, 2018-28
- Leading company sales of dry rice, L52WE April 23, 2023

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