



2019

FACTS AND FIGURES

FLOUR MILLING IN THE UK

A vital role in supplying the nation's food

FLOUR: FEEDING AND NOURISHING THE NATION

Wheat flour is an important bedrock of the UK diet. This single ingredient is in about a third of all grocery products on supermarket shelves and provides 20% of the energy and protein consumed by the UK population. Additionally, flour makes a significant contribution to vitamin and mineral intake providing much of the fibre, calcium (great news for vegans) and iron (more great news for vegans) consumed in the UK. Flour is an ingredient with much to offer.

The quantities of flour milled and consumed in the UK each day are vast.

About 12 million loaves of bread, 2 million pizzas, and 10 million cakes and biscuits are made in Britain every day. Furthermore, data from Kantar shows that bread is purchased by more UK households than any other product – even toilet roll.

To meet demand, the UK flour milling industry processes 6.2 million tonnes of wheat to produce almost 5 million tonnes of flour every year. The industry is the largest single processor of British wheat. In 2018/19, 85% of the wheat used by UK flour millers was UK grown.

UK FLOUR PRODUCTION (000 TONNES)

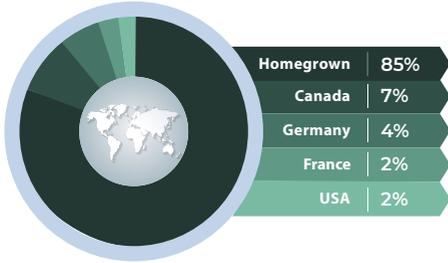
	1988/9	1998/9	2008/9	2016/17	2017/18	2018/19 (E)
Total UK harvest	11,714	15,018	17,227	14,347	14,837	13,953
Total wheat usage *	5,121	5,660	6,836	8,120	6,863	6,242
Home grown usage	3,796	4,632	5,627	7,178	5,834	5,125
EU usage	835	452	623	396	430	447
Third country usage	490	576	586	546	598	670
Total flour production	3,974	4,478	4,861	5,630	5,408	4,949

* Prior to 2012/13 usage includes malt, seeds and breakfast cereals. Figures include starch and biofuel production. (E)= Estimated.

PERCENTAGE OF THE DIFFERENT TYPES OF FLOUR MILLED

White breadmaking	53.5	53.6	48.7	44.1	45.6	48.9
Brown breadmaking	3.5	3.2	2.4	0.9	0.9	1.0
Wholemeal breadmaking	6.3	4.3	6.0	4.7	4.8	5.2
Biscuit	14.6	12.7	11.9	7.1	7.9	9.5
Cake	1.9	1.7	1.7	2.1	2.3	1.9
Pre-packed household	5.8	4.0	3.4	2.9	3.1	3.4
Food ingredients	N/A	N/A	3.6	5.1	5.6	8.0
Starch manufacture and other	14.5	20.5	22.4	33.1	30.0	22.2

SUPPORTING BRITAIN'S FARMERS



85% of wheat milled in
THE UK WAS HOMEGROWN

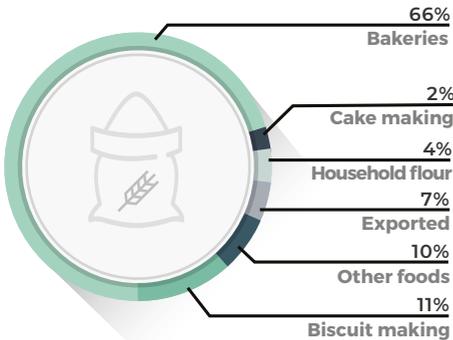
STRENGTHENING BRITAIN'S ECONOMY

5 million 
tonnes of wheat milled each year
MILLED FOR HUMAN CONSUMPTION

£1.25bn annual turnover

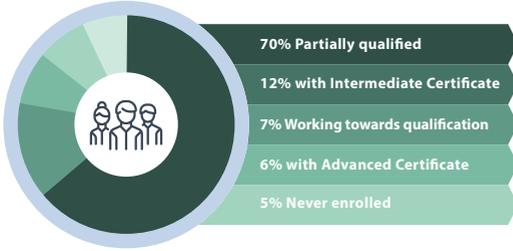
SUPPLYING BRITAIN'S FOOD

WHERE DOES FLOUR GO AFTER THE MILL?

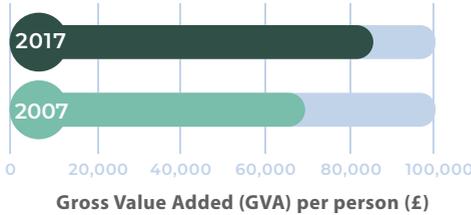


INVESTMENT IN PEOPLE

95% of the flour milling workforce has studied towards the nabim flour milling qualification



IMPROVEMENT IN PRODUCTIVITY



INVESTMENT IN INFRASTRUCTURE

£140m = 15% GVA

Invested in the last 5-years, which puts the milling industry in the top quartile of manufacturing businesses

INVESTMENT IN SUPPLY

7,000



Tests each year on new wheat varieties to ensure sustainable supply

COMMITMENT TO QUALITY

2.7 million

Tests on flour during the milling process

THAT'S 1 EVERY 12 SECONDS

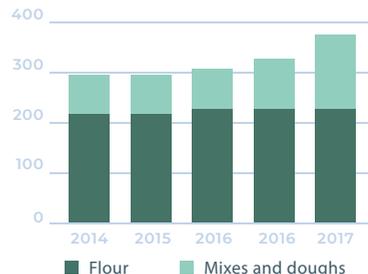


GROWTH IN EXPORT MARKETS

Exports of flour, mixes, breads and baked goods (£ million)



UK exports of flour, mixes and doughs ('000 tonnes)





CULTURE OF INNOVATION



Despite being an ancient tradition, flour millers are proud of the long-standing culture of innovation on which the industry thrives. As far back as 1901, millers embarked on a programme to assess the suitability of wheat varieties grown in the UK for flour milling, work that continues to this day, with some 7,000 tests being carried out annually on the suitability of new varieties to help breeders and farmers produce the best wheat.



The resulting improved quality and reliability of homegrown wheat, together with advances in baking technology, has led to the high usage of domestic wheat, which helps ensure wheat flour remains a reliable, stable and sustainable ingredient.



The range of domestic wheat varieties and UK milling systems allows the production of a huge range of flour types, each suited to different end uses. Imported wheat – sourced mostly from Germany, Canada, France and the USA – is milled mainly for quality characteristics that cannot be found in domestic varieties.

QUALITY, SAFETY AND ASSURANCE

Millers take great care in producing exactly the right flour for each customer, meaning that there are more than 400 different types of flour produced in the UK. In order to meet specific customer requirements, flour millers need to know the exact qualities of the wheat they purchase. In a year, 172,000 lorry loads of wheat are tested by millers, generating over 1.5 million points of data, which are used to determine which wheats should be selected, blended and milled to produce the required flour.

In addition to quality assessments, millers test wheat to ensure it is free from contamination, such as mycotoxins (chemicals produced by naturally-

occurring fungi), agrochemical residues and foreign matter. Some tests are carried out as wheat arrives at mills, whereas others are done within rolling programmes of analysis funded by the industry. Comparing these data over months and years allows identification of areas that require attention, part of a collaborative system designed to deliver world-class food safety standards.

Millers also participate in proficiency schemes and ring-checks to ensure equipment is working properly and that staff are testing accurately. These data are discussed at an industry level to guarantee the whole sector is testing to a high standard.



PEOPLE AND SKILLS

The flour milling sector has consistently invested in its people. Every year, between 5% and 10% of the industry's workforce are enrolled on at least one of **nabim**'s world renowned distance learning courses. More bespoke programmes for developing senior staff are available, and businesses also invest in company specific schemes. Average earnings are well above the norm for food manufacturing, and on a par with advanced engineering sectors such as aerospace - further evidence of industry investment in its workforce.

To support on-demand learning and create a central hub for all the industry's training, **nabim** has invested in the development of a virtual flour mill. Students can investigate individual machines and the way they work together. Virtual tutorials mean that the most is made of time allocated to training, and individual businesses can use the virtual mill for their own bespoke training support.



EXPORTS

Flour exports have grown steadily in the last five years and in 2018 amounted to 245,000 tonnes. Together exports of flour, mixes (which have been growing rapidly) and doughs were worth just over £230 million. Other flour-based products such as bread, biscuits and cake accounted for a further £900 million of exports, bringing the total value to over £1.1 billion annually. This represents significant value addition to approximately 700,000 tonnes of wheat (worth around £110 million) required to make these foodstuffs.



PRODUCTIVITY

UK flour millers have invested heavily in new and renewed facilities during the last ten years. This has delivered improved efficiency and led to steadily improving labour productivity – around 2.5% per year compared with the average in UK manufacturing of 0.5% and 0.9% in food manufacturing over the same period (source: ONS).

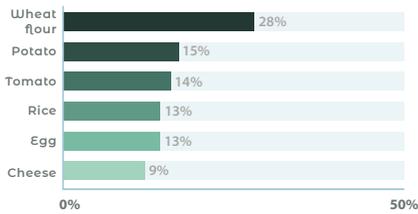
Alongside infrastructure improvements, the UK milling industry is focusing on capturing the data it generates and how this can be applied to improve mill and supply chain performance.

FLOUR IS A BEDROCK OF THE UK DIET



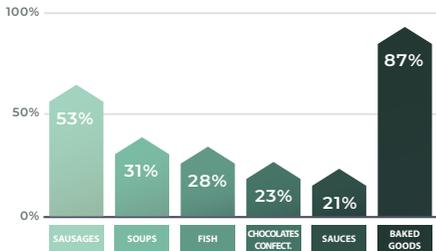
A VERSATILE INGREDIENT

% SKUs CONTAINING THESE INGREDIENTS



Data from Ascential, May 2019

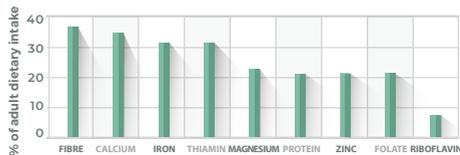
% OF PRODUCTS IN EACH CATEGORY THAT CONTAIN WHEAT FLOUR



NOURISHING THE NATION

Flour is a major contributor of a wide range of essential vitamins and minerals

% INTAKE DERIVED FROM FLOUR



BEST IN SHOW

Flour contains a range of VITAMINS AND MINERALS, outperforming other key ingredients

