

Revised May 2021

FLOUR MILLING IN THE UK

FACTS AND FIGURES



UK FLOUR
MILLERS

UK Flour Millers

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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 toothpaste.

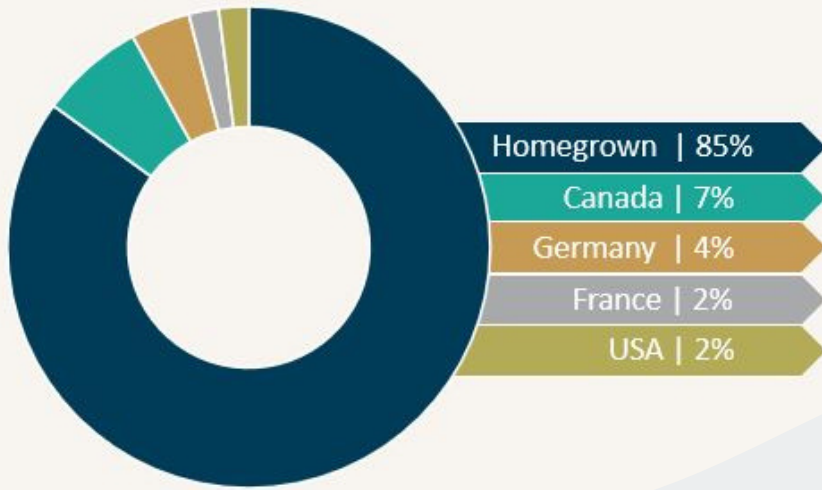
To meet demand, the UK flour milling industry processes 6.2 million tonnes of wheat to produce almost 5 million tonnes of flour every year (including starch and industrial uses of flour). The industry is the largest single processor of British wheat. In 2019/20 the proportion of homegrown wheat used by flour millers was 87%, equalling the all-time high seen previously in 2011. However, a small UK harvest in 2020, with a reduction in quality, means that proportion is expected to fall to 76% in 2020/21.

UK Flour Production (000 tonnes)						
	1990/91	2000/01	2010/11	2018/19	2019/20	2020/21(e)
Total UK wheat harvest	14,035	16,700	14,878	13,555	16,225	9,658
Total wheat usage *	4,814	5,684	7,201	6,084	6,057	5,677
Home grown usage	4,234	4,758	6,418	5,034	5,293	4,156
EU usage	226	318	519	410	227	942
Third country usage	354	608	566	641	537	579
Total flour production	3,860	4,523	5,042	4,829	4,803	4,528

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

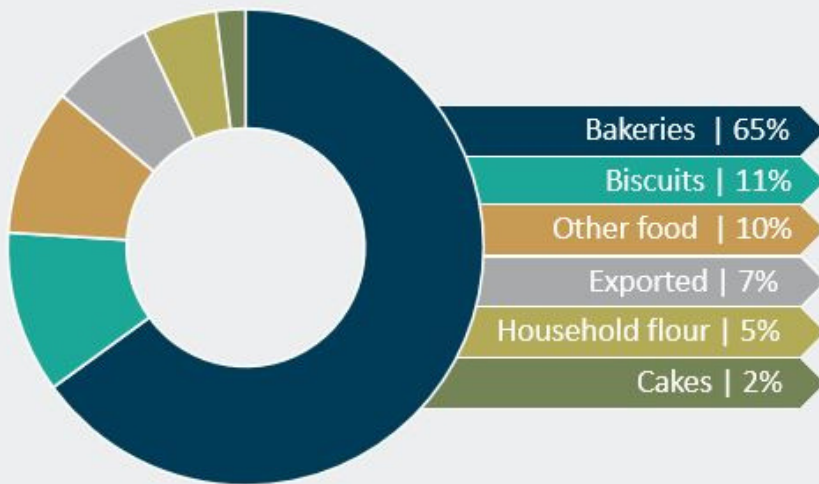
Flour Type (%)						
White breadmaking	54.6	54.8	48.6	49.9	50.5	52.2
Brown breadmaking	3.4	2.3	2.1	1.0	1.1	1.1
Wholemeal breadmaking	6.1	5.4	6.5	5.2	4.5	4.1
Biscuit	14.3	12.3	12.0	9.6	9.7	10.2
Cake	1.8	2.0	2.2	1.8	1.6	1.7
Pre-packed (household flour)	3.5	3.7	2.3	3.5	4.3	4.5
Food ingredient	N/A	2.6	3.3	8.2	8.6	8.9
Starch manufacture and other	2.8	9.4	23.0	20.8	19.9	17.2

THE FLOUR MILLING INDUSTRY



SUPPORTING BRITAIN'S FARMERS

The UK's flour millers are the single biggest user of homegrown wheat in a typical year they would purchase around 5.5million tonnes from Britain's cereal farmers



SUPPLYING BRITAIN'S FOOD

Most of the flour produced in the UK goes into bread. However flour is an ingredient in round 30% of all food in the UK

£1.25

bn annual turnover

5

million tonnes
of wheat milled each year for human consumption





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 as part of an integrated programme to test new varieties. Some 7,000 tests are carried out annually on the suitability of new varieties for milling and baking to help breeders and farmers produce the best wheat.

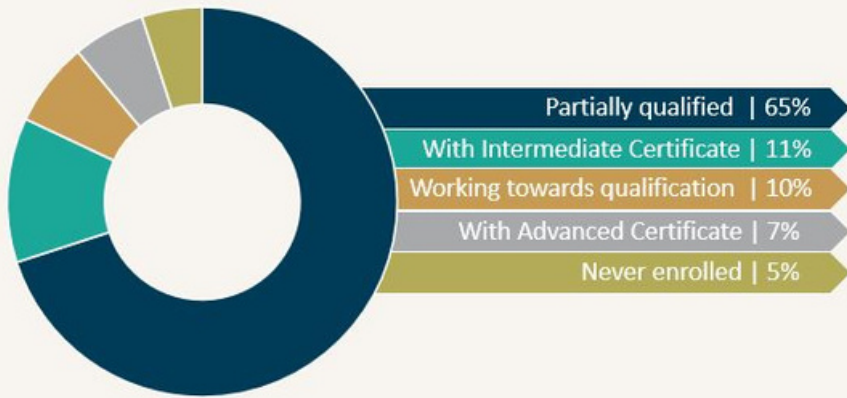


The resulting improved quality and reliability of homegrown wheat, together with advances in baking technology, has led to the high usage of domestic wheat, which helps ensure wheat flour remains a reliable, stable and sustainable ingredient.



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 currently be found in domestic varieties.

INVESTMENT & INNOVATION



INVESTMENT IN PEOPLE

95% of the people working in the UK's flour mills has studied towards a qualification

INVESTMENT IN INFRASTRUCTURE

£140m

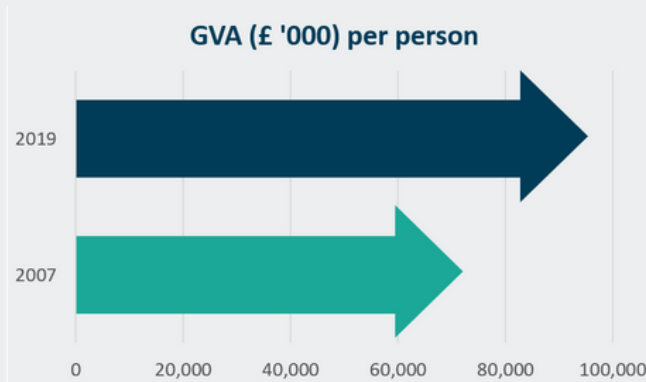
invested in the last five years, which puts the milling industry in the top quartile of manufacturing businesses

INVESTMENT IN SUPPLY

7,000

tests each year on new wheat varieties to ensure sustainable supplies

INVESTMENT IN PRODUCTIVITY



COMMITMENT TO QUALITY

2.7m

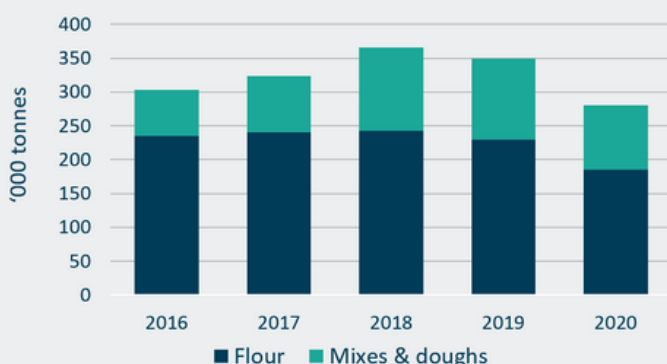
tests on flour during the milling process

That's one every 12 seconds

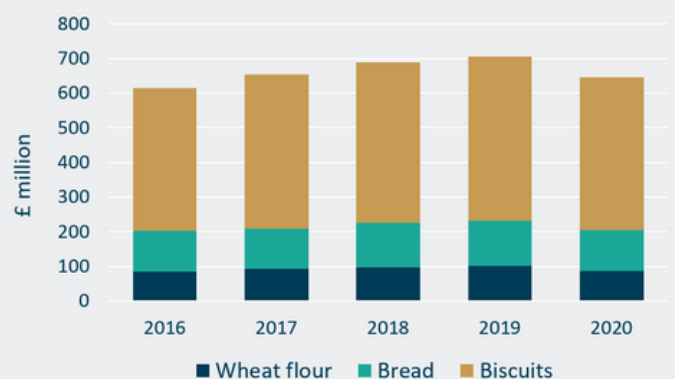


THE EXPORT MARKET

UK exports of flour, mixes and doughs (volume)



UK exports of flour, bread and biscuits (value)



QUALITY, SAFETY & ASSURANCE

“

172,000 lorry loads of wheat are tested every year

Millers take great care in producing exactly the right flour for each customer, meaning that there are more than 400 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 1.5million 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 the UK Flour Millers 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, UK Flour Millers has invested more than £100k 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 are encouraged to make use of the virtual mill in their own training support. Greater use of electronic communication as a result of the Covid epidemic means that greater use of the virtual mill is anticipated and further investment will be made.

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EXPORTS

Flour exports have grown steadily in the five years leading up to 2018 when they reached 245,000 tonnes. Together exports of flour, mixes (which have also grown rapidly) and doughs were then worth just over £230M.

Other flour-based products such as bread, biscuits and cake accounted for a further £900M of exports, bringing the total value to over £1.1Bn annually. This represents significant value addition to approximately 700,000 tonnes of wheat (worth around £110M) required to make these foodstuffs.

The majority of trade is with the EU, there was a decline in exports during 2020 as customers looked for alternatives in Brexit preparations and supply chains adapted to the Covid pandemic.

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).

FEEDING & NOURISHING THE NATION

130m

slices of bread

5m

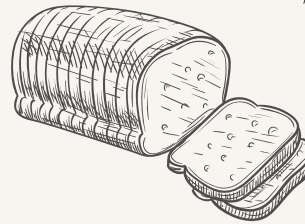
packets of biscuits

99.8%

HOUSEHOLDS
BUY BREAD

Bread is the most popular item
bought in Britain ...

... in fact, more households buy
bread than toothpaste!



4.5m

cakes & buns

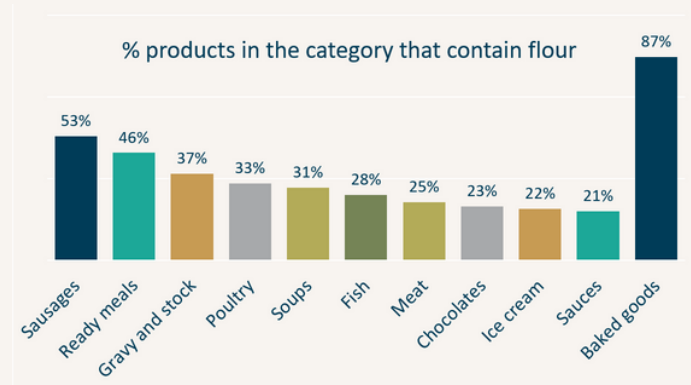
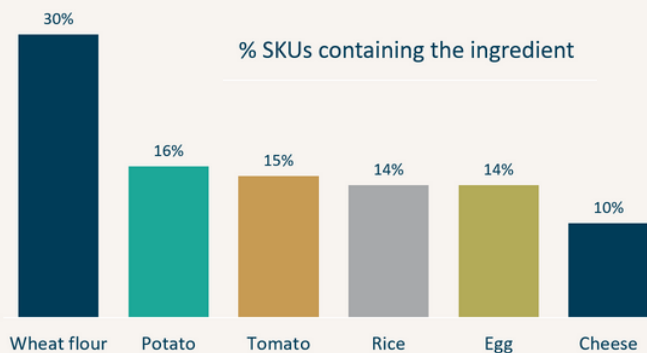
2m

pizzas

MADE FROM BRITISH FLOUR ARE
PURCHASED IN THE UK EVERY DAY

FEEDING THE NATION

Flour is a vital ingredient and can be found in a vast range and quantity of foods



NOURISHING THE NATION

Flour contributes significant quantities of a range of essential vitamins and minerals, outperforming other key ingredients - in both volume and range of nutrients provided

