

Turkish Flour Industrialists' Federation Congress 2012

A few words about wheat, flour and bread...

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President

European Flour Miller's association



The European Flour Millers' association: 26 EU national members & 2 associated members



Associated members:



The European flour millers



45 MILLION

TONNES OF SOFT WHEAT AND RYE PROCESSED IN THE EU EACH YEAR,
THE LARGEST SINGLE FOOD USER OF DOMESTIC WHEAT AND RYE.

45 000 EMPLOYED
PEOPLE

OVER 600 TYPES
OF HIGH-QUALITY FLOURS TO MEET
INCREASINGLY SPECIFIC CONSUMER
DEMANDS

USE OF CAPACITY
ESTIMATED AT

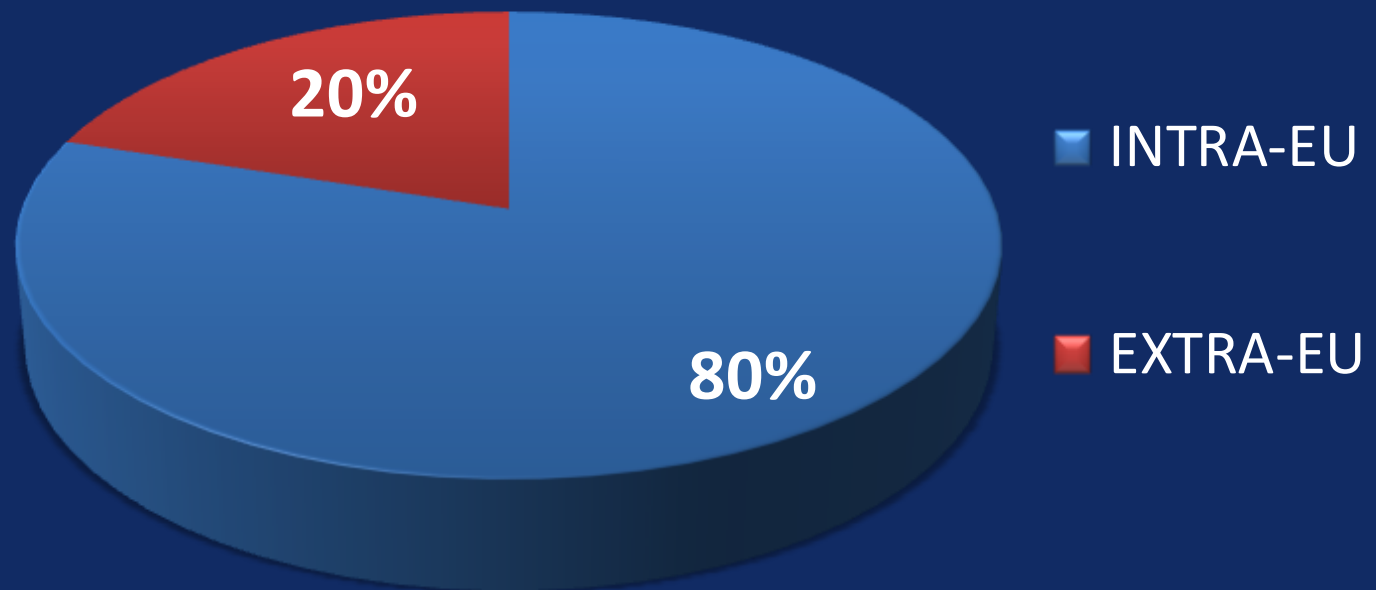
65%

€ 15 BILLION TURNOVER

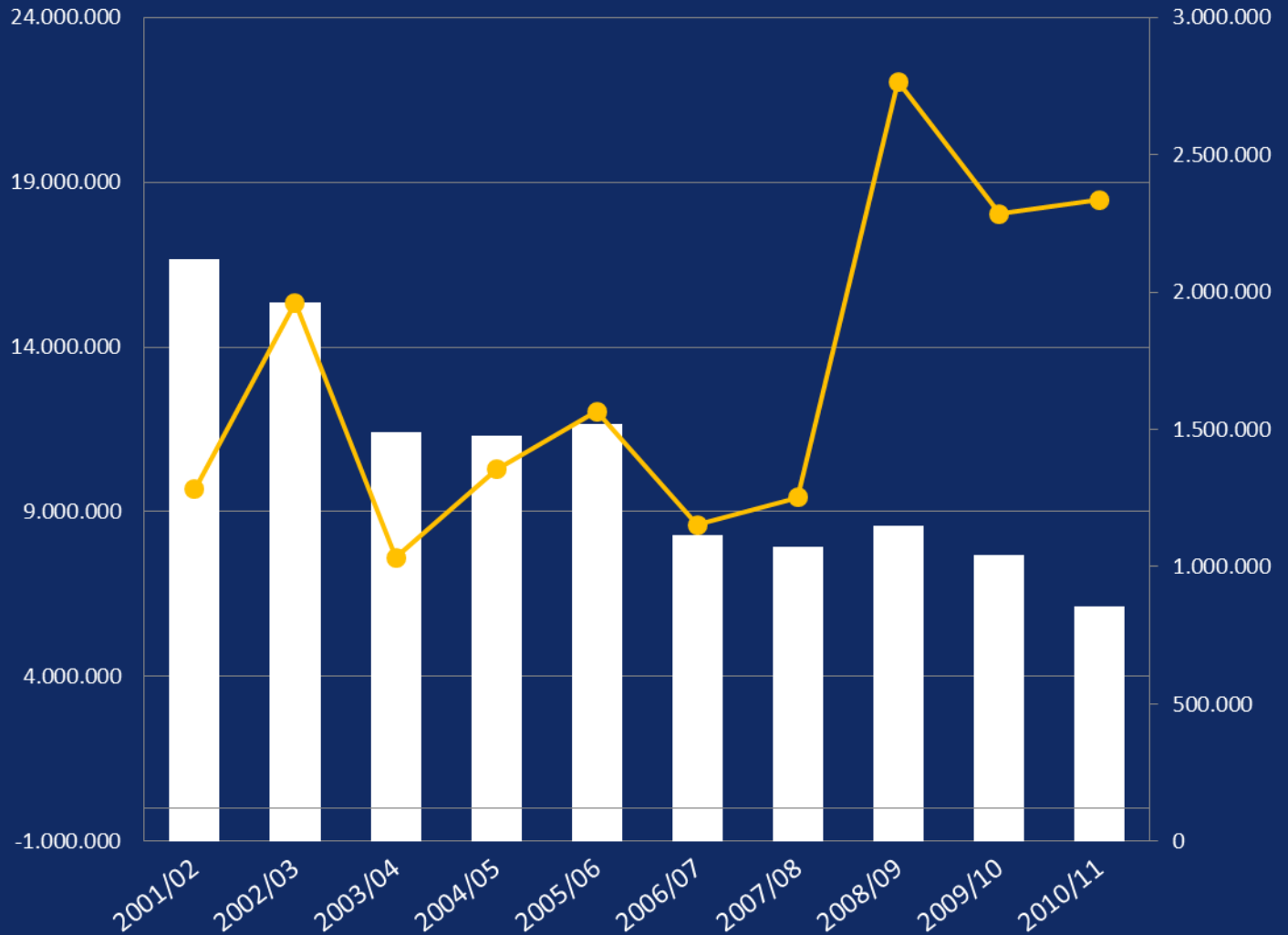
MORE THAN
3 800
MILLING COMPANIES
A FRAGMENTED INDUSTRY
CONSOLIDATING

11%
SHRINKING SHARE OF EU FLOUR
EXPORTS ON GLOBAL MARKETS

Origin of wheat & rye supply for EU flour millers



EU wheat & flour exports evolution EU 25/27 (t)



The heavy EU food legislation

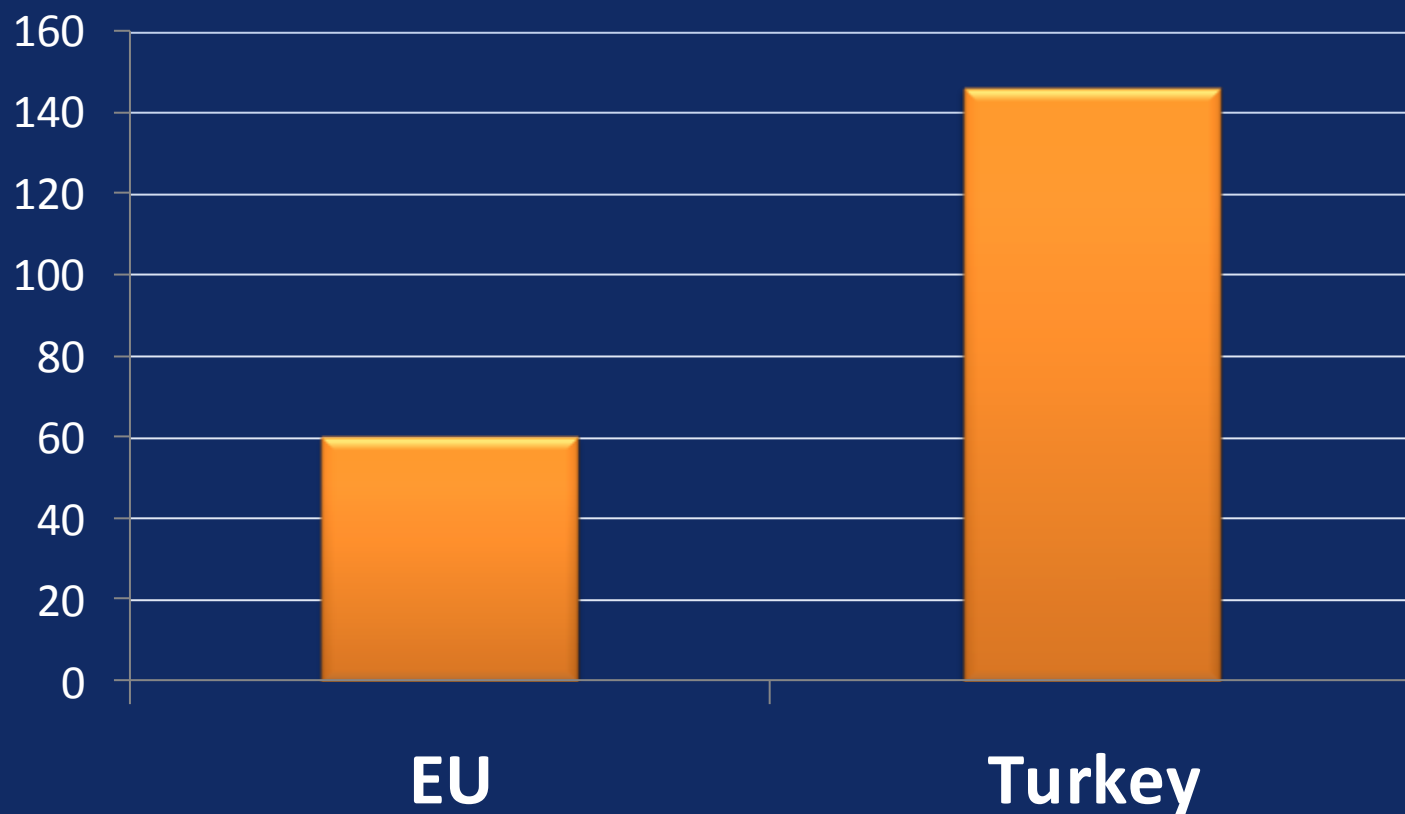


European bread, European breads



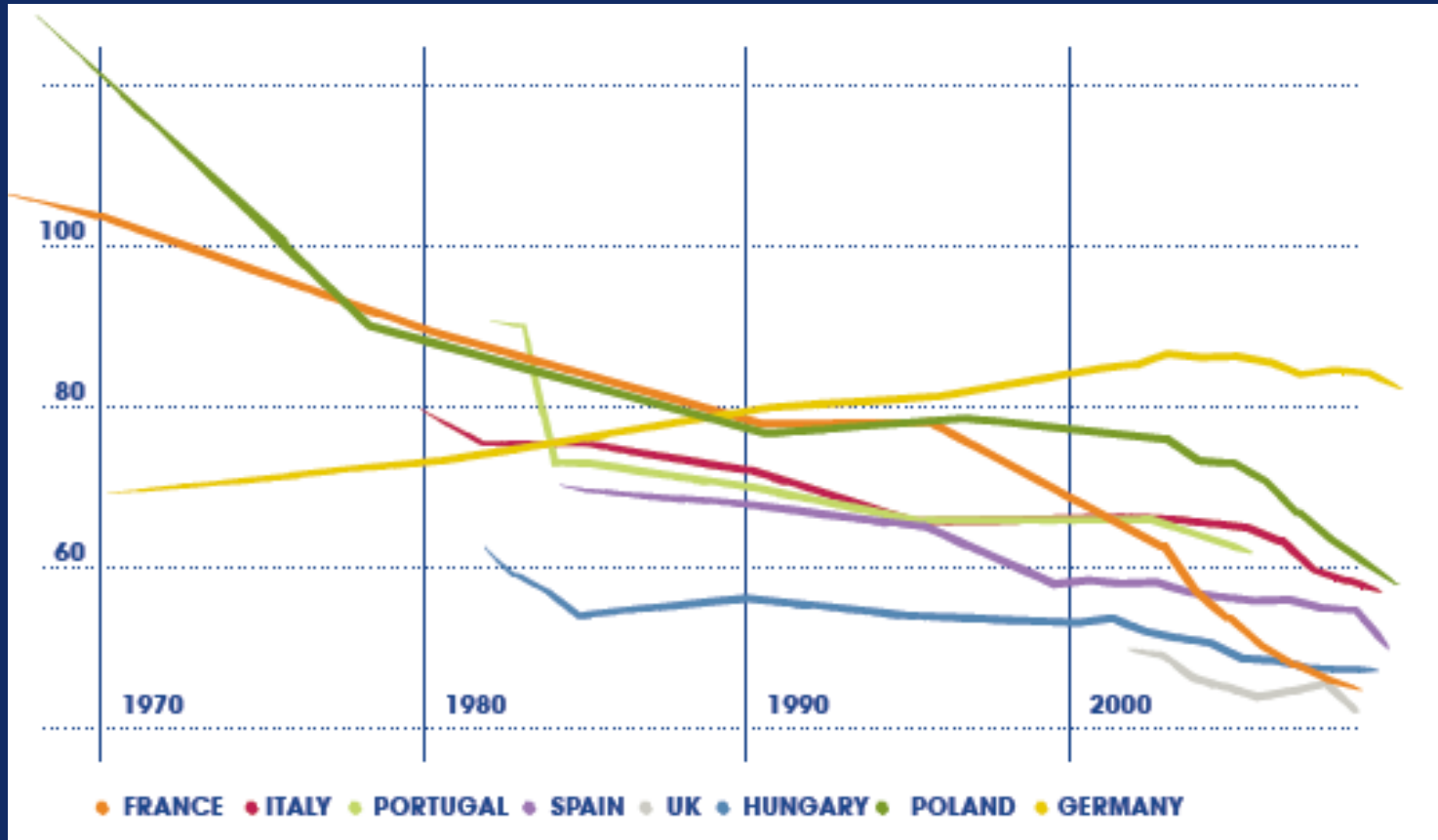
Bread consumption

Bread consumption per year (kg/capita)
estimate

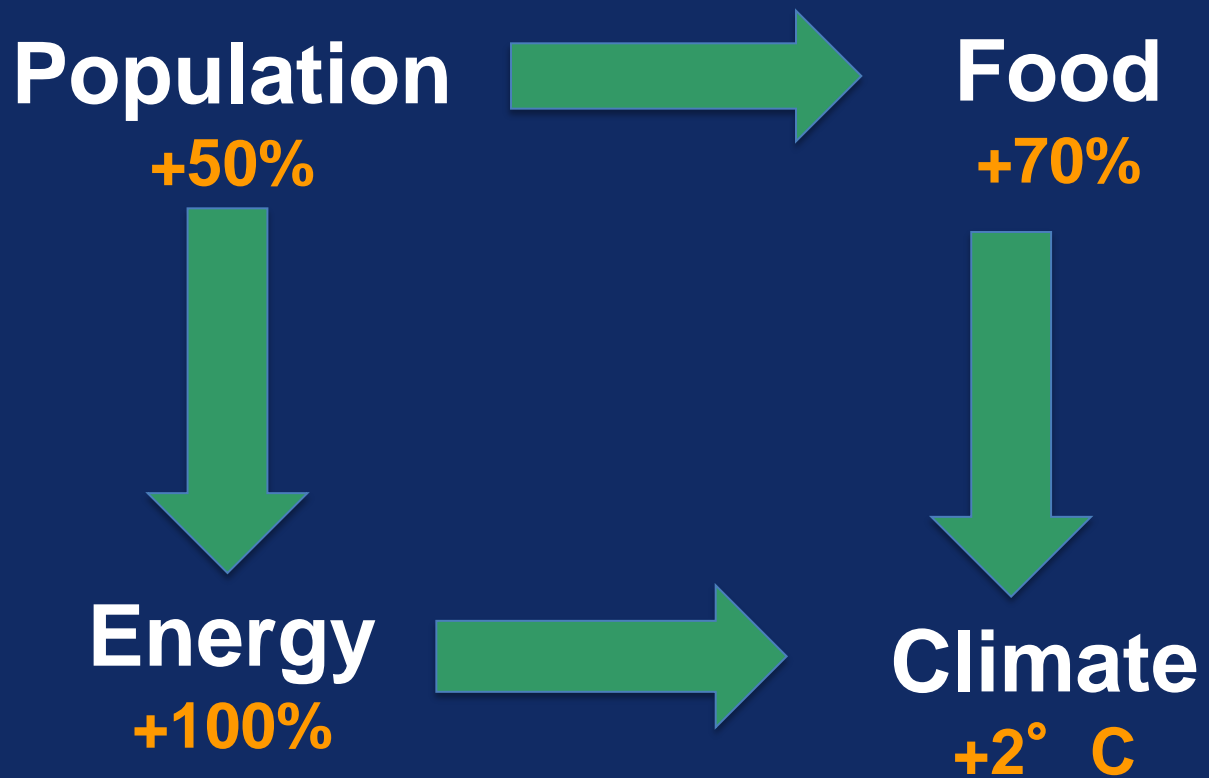


Source: Turkven

Evolution of bread consumption in the EU



An expected growing demand with expected growing constraints...



... in the world that we inhabit

- Overcapacity in flour milling business causing mill closures
- Stiff competition across flour market
- Overcapacity in the baking industry
- Volatile wheat market
- High energy costs
- Powerful demanding customers

