

# Turkish Flour Industrialists' Federation Congress 2012

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

**Hubert François**

**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

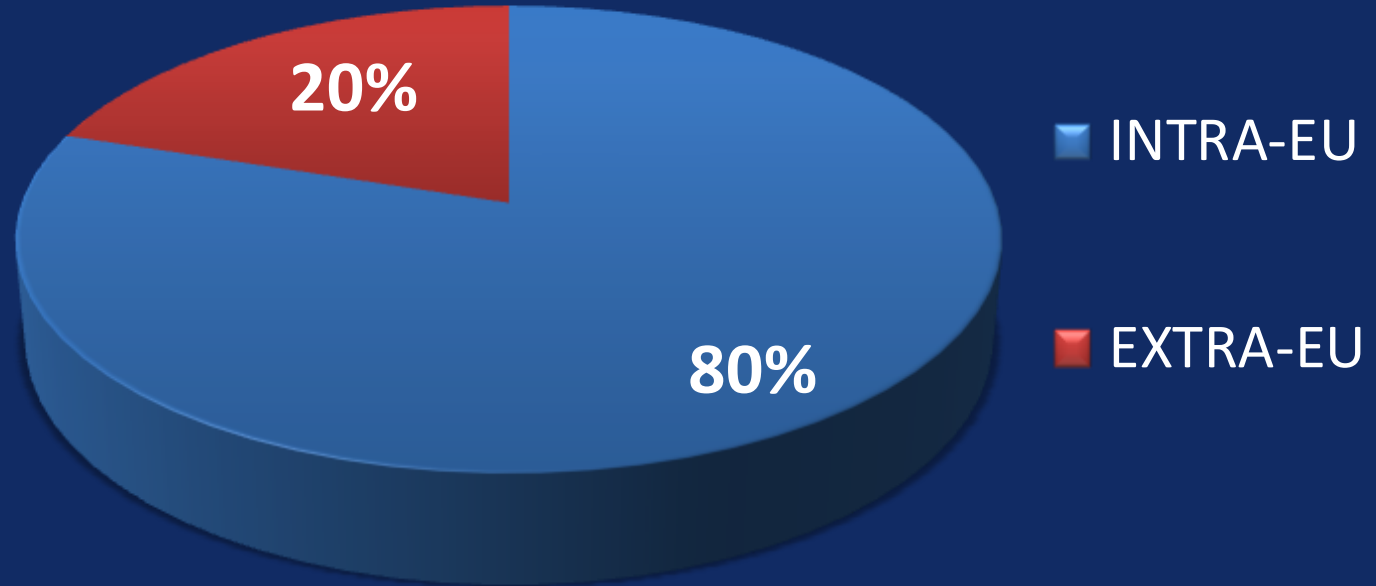
**65%**

**€ 15 BILLION** TURNOVER

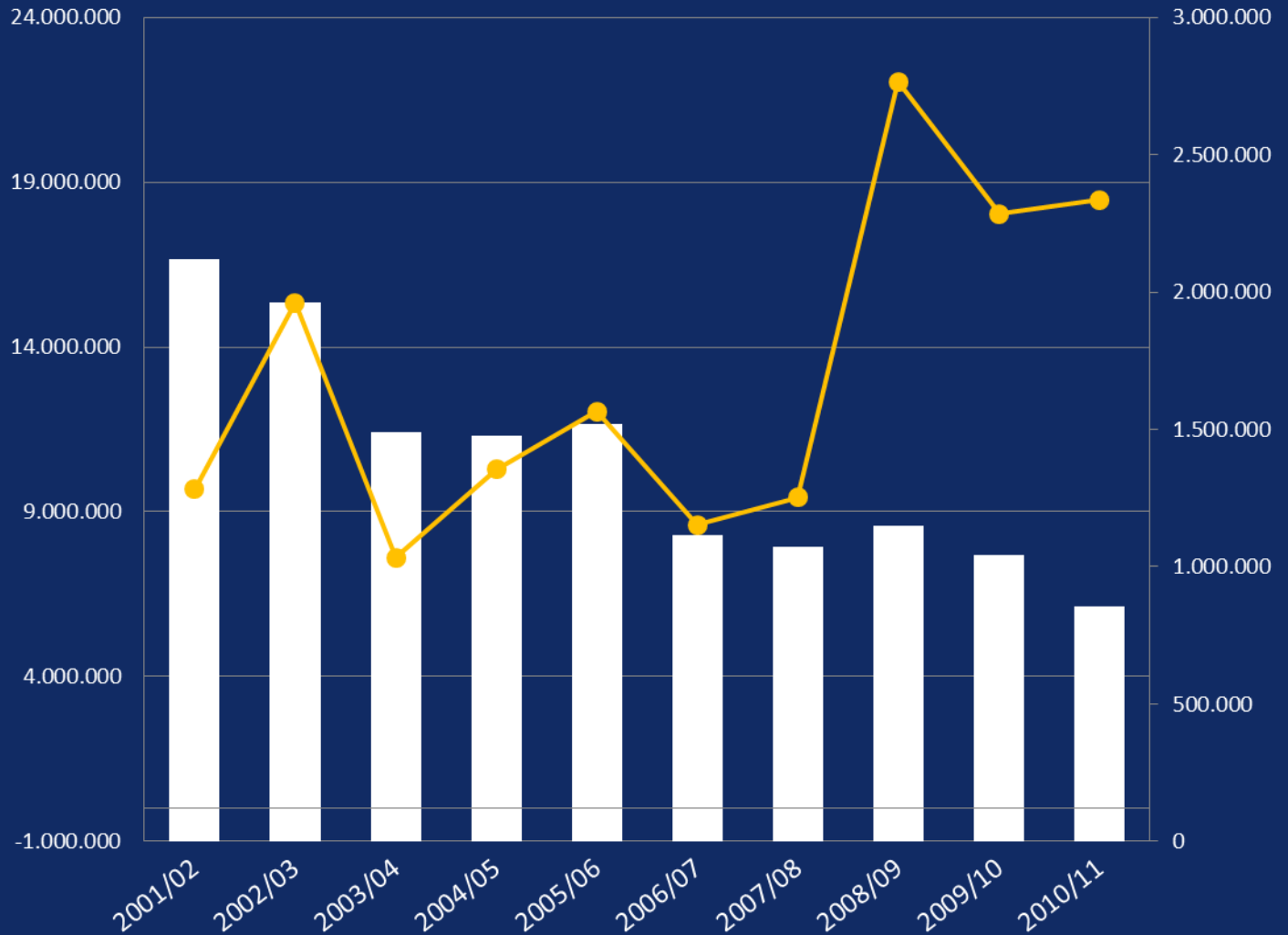
MORE THAN  
**3 800**  
MILLING COMPANIES  
A FRAGMENTED INDUSTRY  
CONSOLIDATING

**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

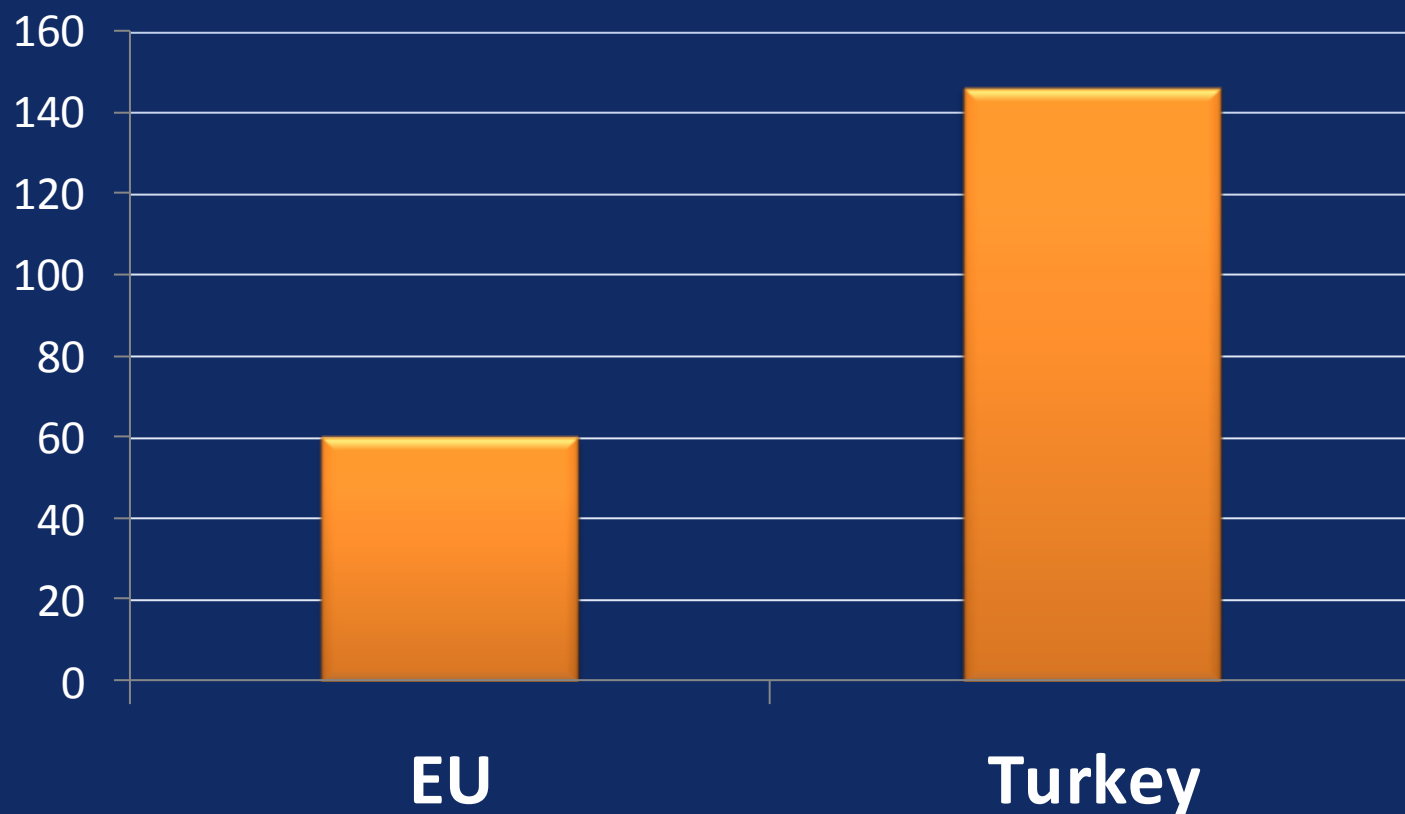


# European bread, European breads



# Bread consumption

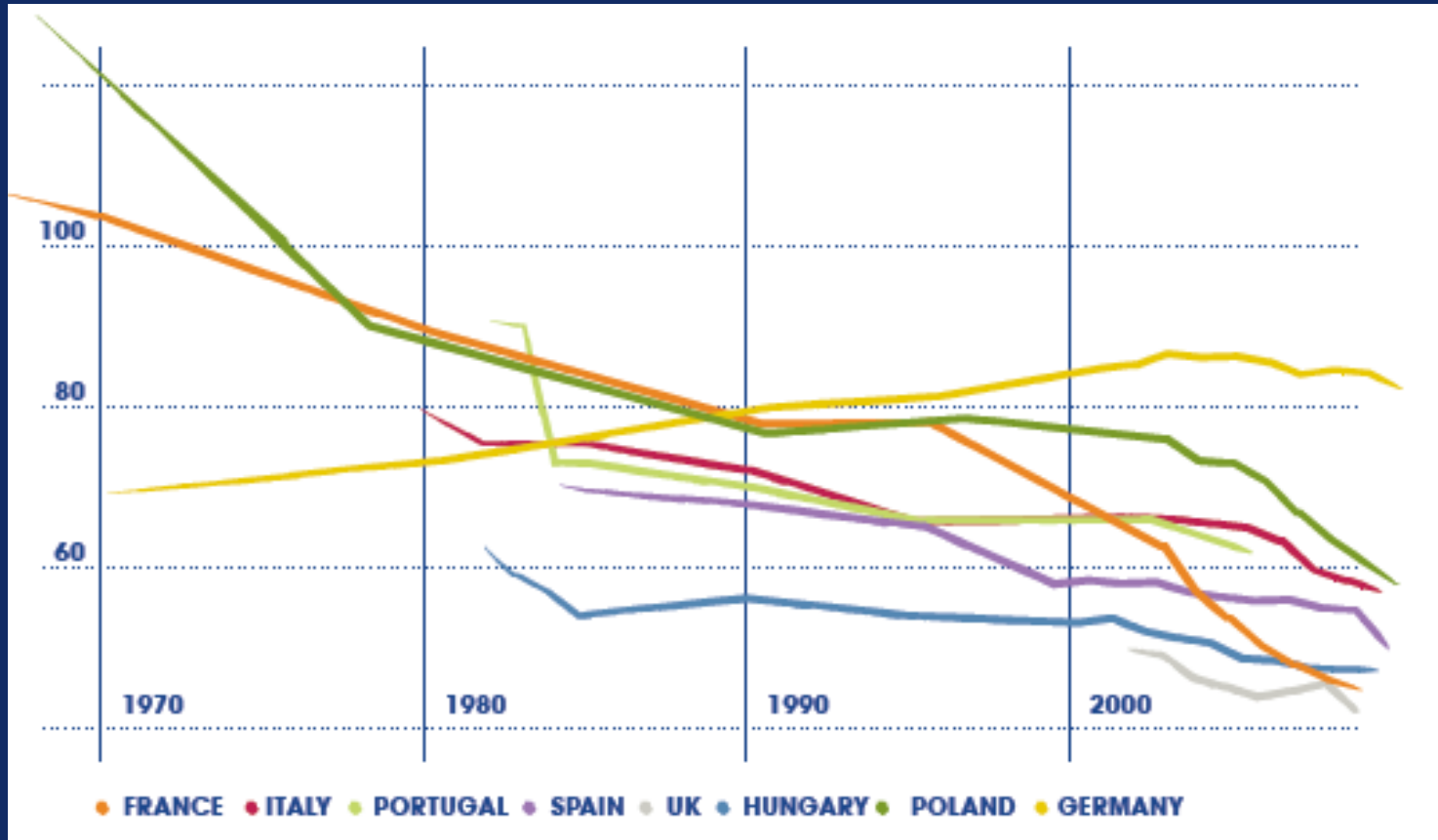
Bread consumption per year (kg/capita)  
estimate



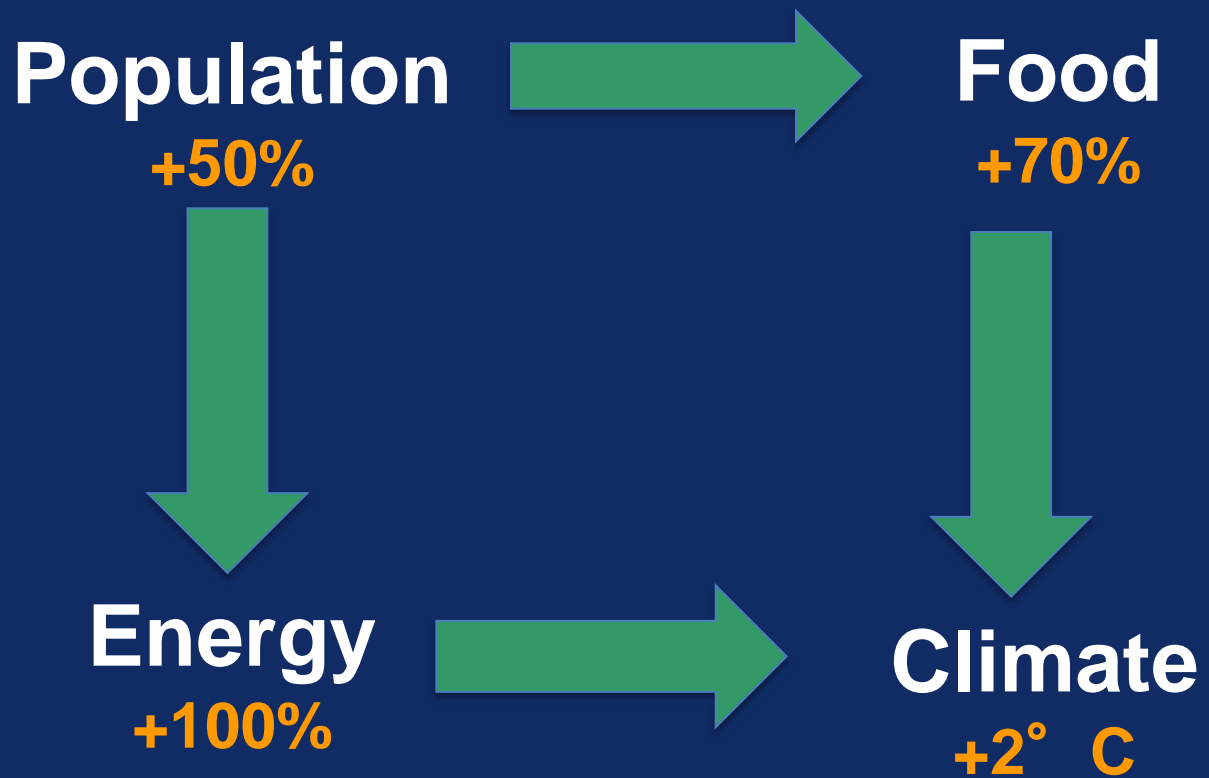
Source: Turkven



# 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

