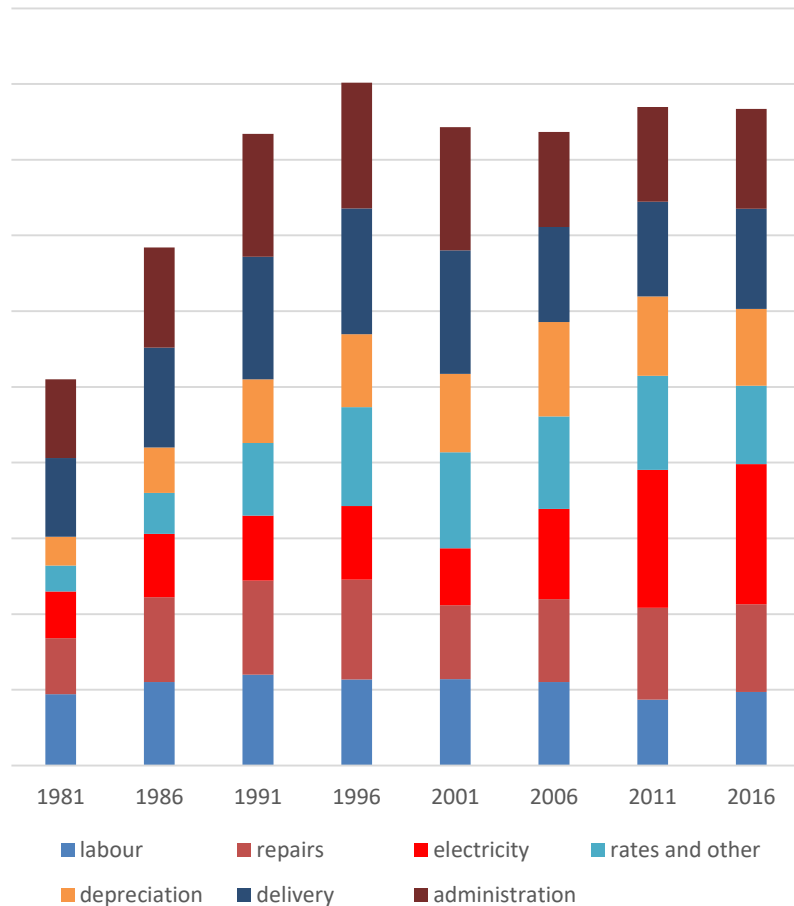


# The UK/Ireland Milling Sector

- 50 Mills;
- Producing over 4 million tonnes of flour;
- Using > 5 million tonnes of wheat for human consumption, about 4.5 million tonnes from UK farmers;
- Imports split between North America and other EU countries;
- Flour and mixes exports growing – around 8% of overall production – mostly to EU countries.

# Flour Milling manufacturing cost index 1981- 2016



- Benchmarking encourages close focus on cost control
- Increased electricity cost increase is a reflection of govt renewables taxes
- Productivity up by more than 25% since 2008