



UK FLOUR
MILLERS

Nourishing the nation

The economic impact of the
UK flour milling industry

January 2025



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About this report

This report was written and researched by the economics consultancy Policy Points.

The analytical approach used to reach the findings within the report is set out in a methodology at the end of the document. The analysis is underpinned using proprietary data commissioned from technology company The Data City. Data taken from other sources are fully referenced at the end of the document.

Thanks go to UK Flour Millers for its and its members' contributions to the content of the report.

POLICY POINTS

Research - Data Analysis - Public Policy



Key findings

The UK flour milling industry is a highly productive and key strategic asset for the UK. The nation is self-sufficient in flour production, helping to deliver food security.

The key annual statistics for the industry's economic impact are:

£2 billion

GENERATED IN ANNUAL TURNOVER

£700 million

CREATED IN VALUE ADD TO THE ECONOMY

9,000 people

EMPLOYED DIRECTLY AND INDIRECTLY

£270 million

DELIVERED IN TAX TO THE EXCHEQUER
(DIRECT AND INDIRECT)

The flour milling industry is a pivotal one, central to the production of food consumed by almost every (97%) UK household.

With £141,000 of Gross Value Added GVA per employee, it is also one of the most productive industries in the UK, outstripping sectors such as manufacturing and construction. It is a performance sustained by innovation, allied to substantial and ongoing investment in new mills and new technologies.

Flour millers are the bridge in production between farmers and food manufacturers, and need a supportive policy environment in order to grow its economic impact. This includes:



Supporting food security. Retaining the most productive agricultural land for growing high quality milling wheat.



Supporting international competitiveness. Ensuring the needs of the flour industry are considered when renegotiating free trade deals.



Supporting innovation. Ensuring a pro-innovation business environment, specifically a tax system that supports R&D which is key to long term food security and lower carbon intensity



Support for the ongoing energy transition. Continuation of policies which ensure that industry is not unduly burdened with higher energy costs as the system becomes progressively greener.



Training. Allowing apprenticeship levy contributions to fund millers' substantial and ongoing investment in training and developing the workforce of the future

Get this right and the UK flour milling industry will continue to thrive, contribute to the economy and nourish the nation. And ensure food security at a time when the world has become more unpredictable.

Introduction – a pivotal industry, with a large impact

The UK flour milling industry plays an important role in our everyday lives. There are only 51 flour mills across the country. But these mills produce a foodstuff that is consumed in almost every household. Indeed, more households eat flour-based products (99%) than have access to the internet (93%).¹

This report presents estimates of the economic impact made by the UK flour milling industry, shining a light on the companies that are nourishing the nation.

In making this impact, the industry has numerous positive characteristics.



A high-skilled workforce. The flour making process requires millers, engineers, technical, logistics and procurement experts, scientists and nutritionists, among many other types of skilled labour.



Making a nutritious product. Flour is rich in iron, fibre and calcium, and contributes significantly to our daily intake. This will shortly be complimented by the addition of folic acid, in line with the new Bread and Flour Regulations.



Supporting UK agriculture. 80% of the wheat used to make flour is now homegrown – double the level of forty years ago² – providing a secure food source, rather than relying on imports from overseas.



A critical input to other industries. Bakers and other food manufacturers would not be able to make or improve food products without a functioning flour milling industry.



Investors in the economy. Millers continuously invest in their operations, and undertake R&D to provide a quality product at a competitive price.



Ensuring food security. The UK is essentially self-sufficient in flour production, a valuable strategic asset to the nation.

Despite its success in nourishing the nation, the industry faces potential headwinds that make it more challenging to thrive in the future:

- **Uncertain supply and demand.** Bad weather can affect the supply of wheat crops and consumer choices – especially during a cost of living crisis – can reduce demand for flour.
- **New international trade agreements.** Risk exposing the market to cheap imports, sold below the cost of production, produced to lower quality and food safety standards.
- **Maintaining supply chains.** There is pressure on productive agricultural land being taken for (potentially more profitable) crops, and other land uses.

Within this context, the following chapters set out the economic impact of UK flour milling industry, describing:

- **The flour milling ecosystem.** Explaining the system in which flour is made.
- **The economic impact of the UK flour milling industry.** Described in terms the economic output, the employment and the tax revenues that are generated by flour millers.
- **Conclusion.** Setting out what the analysis means for policymakers and the industry.

The analysis is supplemented by case studies from the flour milling supply chain, telling individual stories of a wheat farmer, a flour miller and a baker. A methodology and references are presented at the end of the report.

The flour milling ecosystem that nourishes the nation

This flour milling ecosystem is underpinned by the following characteristics:

- **A commitment to R&D.** The flour milling industry has a long history of R&D investment, establishing its own research association in the 1920s which still exists today having broadened its scope to food and drink innovation.³ Today the industry carries out regular surveys on issues ranging from the microbial content of flour⁴ to the transport and storage of flour.⁵ Respected research organisations operate across the supply chain, including Campden BRI, in the seed growing sector and the National Institute of Agricultural Botany in the agricultural sector.
- **A commitment to safety and production standards.** For example, the Red Tractor scheme that sets standards for farmers to meet, including on how the grain is stored and how pesticides are applied to crops. The standards are reviewed and updated every three years with input from the flour milling industry.⁶
- **A commitment to collaboration.** Being facilitated by bodies such as the British Nutrition Federation and the the Arable Chain Advisory Group. This collaboration is evident in the projects such as developing proposals for the Digital Grain Passport, a technology that promises to make data within the supply chain more efficient, accurate and traceable.

The following four stage process is a simplified explanation of how flour begins with farming and ends with food products bought by households and businesses. The process is represented in a graphic in Figure One.

The overwhelming majority of the process takes place in the UK, making flour milling – and its supply chain – a self-sufficient and secure source of food.

1. WHEAT GROWING

In a normal year for weather that produces an average harvest, 80-85% of the wheat millers use in UK flour mills is bought from UK farmers. To supply this demand, farmers must choose one of the nearly 40 varieties of milling specification wheats to grow, and then carefully monitor the crop from planting to harvest. Flour millers only buy wheat from 'assured sources', which are farms that adopt industry best practice, keep traceability records and that are independently audited.⁷ In doing this, farmers have an ongoing and open dialogue with flour millers about the characteristics of the crop (see Case Study One).⁸

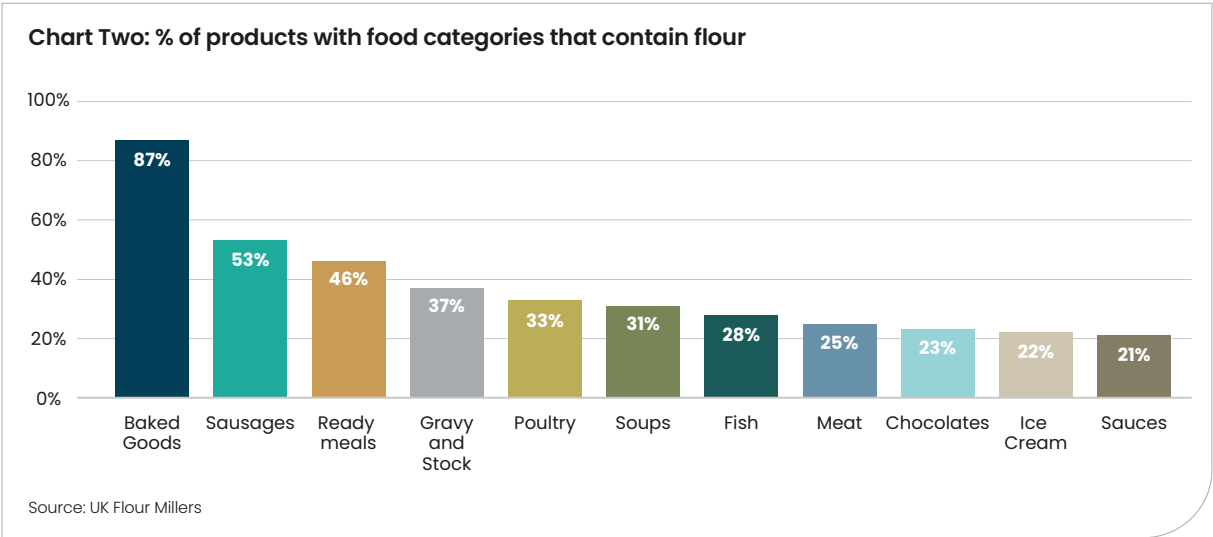
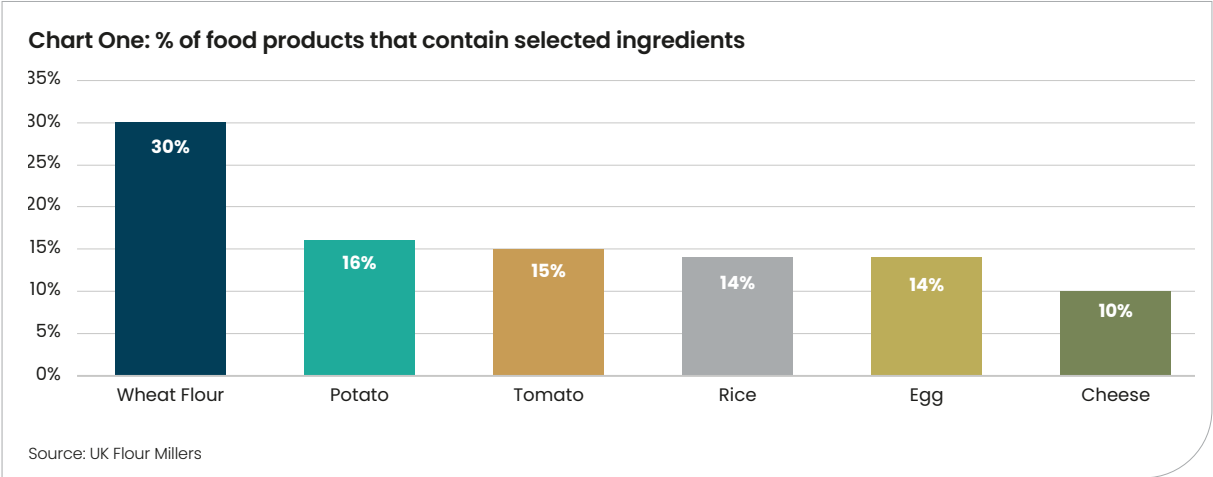
2. FROM WHEAT TO FLOUR

Flour millers procure wheat either directly from farmers or through specialist agri-trading businesses. It is then checked for quality and food safety by skilled people in testing laboratories on arrival at site.⁹ High specification industrial equipment is then used to clean the wheat and to remove impurities, before it is milled to produce flour.¹⁰ It is worthy of note that flour milling is a near zero waste process, with every 100 tonnes of wheat generating between 75 and 78 tonnes of flour (on average) and 22 tonnes of by-product that goes into the animal feed industry.¹¹ Continuous testing takes place throughout the process to ensure flour and the by-product meet food safety and quality requirements.¹² Indeed, many flour millers have onsite facilities to bake and test the performance of the flour.

3. FROM FLOUR TO FOOD

The flour is stored and then distributed. The majority (around 80%) is delivered in bulk tankers to industrial bakeries and other food production sites; the balance is packed and sold either to smaller artisan bakers or for home baking.

While the majority of the flour produced is used in breadmaking, it is a key ingredient in many other foods, from biscuits and cakes to sausages and soups to sauces. In fact, almost a third (30%) of the food products on supermarket shelves contain flour as a primary or secondary ingredient. It is also likely less well known that flour is integral to the ingredients of many food products beyond baked goods (see Chart One). For example, over half of sausages on the market contain flour (see Chart Two).



4. NOURISHING THE NATION

Virtually every person in the UK will consume a product that contains domestically milled flour in their lifetime. 99.8% of British households buy bread, a greater proportion than buys toothpaste.¹³ This means that flour contributes significantly to the nation’s diet and to its health – the latest Government National Diet and Nutrition Survey found that flour was the largest contributor to iron intake, higher than red meat, and also contributes to around a third of our fibre and calcium intake.¹⁴

The flour milling supply chain – a UK production process



Production Inputs

Availability of these three inputs are essential within each part of the supply chain

Skilled workers



Transportation



Energy



Standards

Homegrown wheat is all assured to high production standards under Red Tractor and Scottish Quality Crops.

We produce safe flour, tested across significant due diligence monitoring programmes.

The milling / farm relationship Heygates, Northamptonshire

Based in Northamptonshire, the Heygate Group has 10 flour mills on four sites. Originally a family farming business, the company expanded into milling in the 19th century.

Today, Heygates is a multi-million pound business working across farming, animal feed, flour milling and baking. One notable change to this milling business has been the development of their grain supply. In the 1990s, Heygates had the option of some 65 agri-businesses from which to source grain. This has fallen to 18 in a consolidation that has also reduced trading options for farmers.

Milling wheat has distinct characteristics which are essential in producing a flour which has the performance bakers and other customers require. Growing milling wheat is a conscious decision for farmers: they select a wheat variety from the Recommended List and target quality levels which are critical for the food manufacturer. To achieve this, careful husbandry is required, with the optimum amount of fertiliser applied to meet the key criteria. This additional investment is returned by the relevant premium for the quality of wheat required.

While many millers continue to work with these agri-businesses as key partners in the supply chain, Heygates and a number of others have developed direct supply relationships with farms. This approach means that millers have a direct link to farm gives deeper control of timely deliveries of wheat at a consistent and high quality. For farmers, they know where their grain is going and can access opportunities to expand to meet growing demand. This is consistent with millers' desire to take wheat from as close proximity to the mills as possible.

The relationship between Heygates and Parrish Farms is built on years of collaboration founded on trust and reliability. Parrish Farms selects and grows the wheat varieties specified in the Recommended List that meet miller's requirements, targeting a specification for delivery which includes precise protein levels and moisture levels.

Heygates' own farming involvement strengthens the partnership with Parrish Farms, as they have a shared understanding of the pressures facing the industry and the challenges in growing wheat. For example, the profit from growing wheat may be less than other forms of land use, such as solar energy generation. Additional pressures, such as carbon border adjustment mechanism import charges on fertilisers add further cost and impediment for wheat producers.

Challenges faced by wheat producers inevitably impact flour millers, potentially reducing domestic food production at a time when feeding a growing population is of paramount importance. Supporting domestic wheat growers is essential, as an increased reliance on imports will put further pressure on food supply chains.



The economic impact of the UK flour milling industry

The art of flour milling began millions of years ago. The Stone Age saw wheat grains ground into flour using only rocks before primitive grinding tools were developed. Progress was slow until the massive technological leaps of water powered mills and then steam powered mills enabled mass production during the Industrial Revolution.¹⁵ Roller mills were introduced in the late 1800s, improving efficiency and helping meet growing demand for white bread, by milling harder, imported wheats from countries including Canada, Australia and India. Today, the most modern mills use artificial intelligence and computer systems to produce hundreds of varieties of flour for everyday consumption.

The UK flour milling industry today produces 3.8 million tonnes of flour a year. That is 73,100 tonnes every week, 10,500 tonnes every day, 430 tonnes every hour and seven tonnes every minute. One tonne of flour can be used to make 1,800 loaves of bread. In undertaking this production, flour millers stimulate economic activity that begins with a seed in the ground and ends with food on a plate.

Using the financial accounts of flour milling companies, submissions from flour millers themselves and Office for National Statistics data, Policy Points has quantified the economic impact of the flour milling industry in three ways. First, the direct economic impact from the milling process. Second, the supply chain impact from millers' expenditure. Third, the wider economic impact from employees spending wages.

These impacts are described in terms of:



Gross Value Added (GVA). A widely-used measure of how organisations and sectors make a contribution to the economy, representing the value of goods and services produced, less the cost of production.



Employment. The number of people in jobs that are directly or indirectly as a result of flour milling activity.



Tax revenue. The money that flows to the Exchequer directly or indirectly as a result of flour milling activity.

The estimated economic impact paints a picture of a small, specialist and highly productive industry contributing to food security and the health of the nation.




THE DIRECT ECONOMIC IMPACT

The day-to-day operations of millers have an immediate economic impact. Money is spent and invested in operating mills, people are employed and paid, and tax is submitted to local and national governments.

This activity generated an estimated £2.2 billion in turnover in 2024. This figure is also in line the UK sales of food producing giant Nestle,¹⁶ global car manufacturer Renault¹⁷ and the magic circle law firm Linklaters.¹⁸

In generating this turnover, Policy Points estimates that the UK flour milling industry directly:




Gross Value Added (GVA): Contributes £370 million in value added to the UK economy

This is roughly a quarter (25.2%) of the GVA of the Software Publishing industry and one fiftieth (1.7%) of the GVA of the Film, TV, Video, Radio and Music industry.¹⁹



Employment: Employs 2,600 people

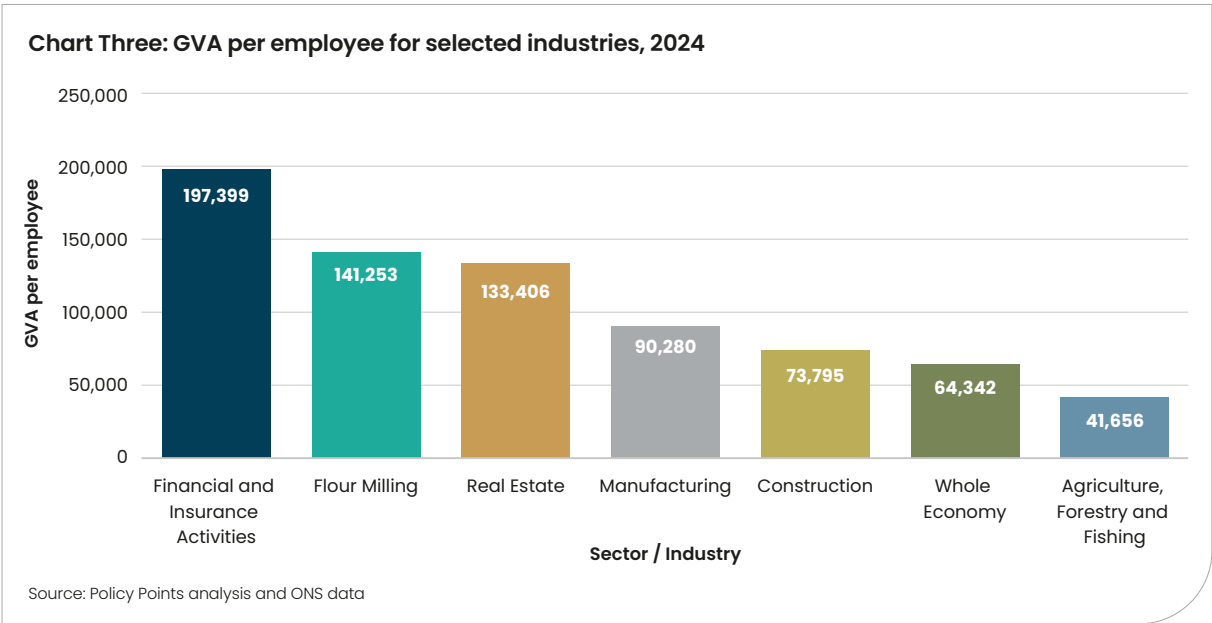
This is the same number of employees as other specialist industries, such as glue manufacturers, music and video retailers and publishers of learned journals.²⁰ Some of these employees will be starting out in their careers with 30 apprentices in training across flour milling businesses.²¹



Tax revenue: Generates £82 million in tax for Exchequer

These figures suggest that the UK flour milling industry is extremely productive. It creates an estimated £141,000 of GVA per employee. This is higher than the sectors of Real Estate (£133,000), Manufacturing (£90,000) and Construction (£74,000). It is more than twice as large a GVA per employee contribution than across the economy as a whole (£64,000). Chart Three shows this GVA per employee comparison across selected industries.

A significant contributor to this GVA performance comes from the substantial investment in new mills and wider modernisation of existing ones. In the last ten years alone, more than £250 million has been invested by UK millers, including in eight new mills across the country.



THE SUPPLY CHAIN IMPACT

Flour millers procure goods and services from other businesses to make flour. For example, they purchase wheat, milling equipment, delivery lorries and other services. These purchases underpin other transactions in other supply chains. For instance, the farmers growing wheat buy machinery to plough soil, plant seed and to harvest the crop.

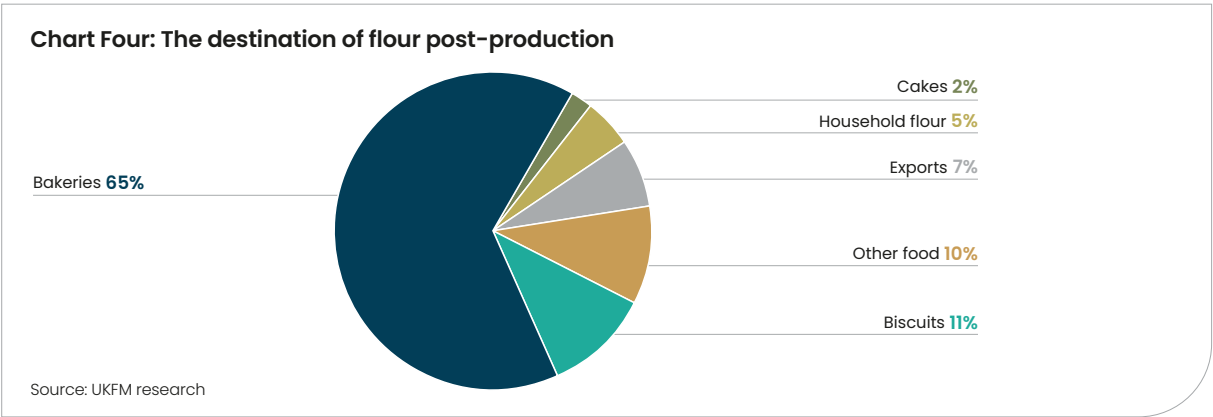
This spending can be significant. For instance, the flour milling industry purchased an estimated £800m of wheat from UK farmers in 2024. In undertaking this supply chain spending, Policy Points estimates that the industry indirectly:

**Gross Value Added (GVA):** Contributes £295m in value added to the UK economy

**Employment:** Supports the employment of 5,190 people

**Tax revenue:** Generates tax revenue of £105m for the Exchequer

Just as other industries’ inputs are central to the flour production process, flour is an integral input to food production processes. Almost two-thirds (65%) of flour produced is used by the nation’s bakeries. The rest goes into other foodstuffs, is exported or is sold as a household ingredient. Chart Four breaks the destination of flour down.



Within this context, the flour milling industry makes a product that supports a much broader economic impact. For instance, the flour is the main ingredient into the UK bakery market which is worth £5 billion and is one of the largest markets within the food industry. Without flour, the large-scale bakers, in-store bakers and high street craft bakers would not be able to make the products that they do.²² More generally, flour millers are part of the food manufacturing industry which generates £40bn in value added to the UK economy.²³

THE WIDER ECONOMIC IMPACT

The spending of employees both within the flour milling industry and within the companies that form its supply chain has an economic impact. Their wages are used to pay for housing, food, entertainment and healthcare etc. In turn, this creates additional demand for goods and services, which ultimately means stimulating more economic activity and the creation of jobs. Policy Points estimates that the waging spending supported by the flour milling industry:

**Gross Value Added (GVA):** Contributes £110m of value added to the UK economy

**Employment:** Supports the employment of 1,300 people

**Tax revenue:** Generates tax revenue of £39m to the Exchequer

Henllan Bakery – Denbigh, Wales

Henllan is a family-owned bakery business based in Denbigh, Wales that opened its first bakery in 1908. Today, with the fifth generation of the Moore family now working in the business, they employ more than 130 people, supplying fresh baked goods six days a week across the whole Wales, into the Shropshire and Wirral borders.

Henllan has two bakeries in Denbigh, making breads, morning goods, cakes and savoury items. They are proud users of Welsh produce across both sweet treats and pies, including jams from Welsh Lady Preserves and Halen Môn sea salt in their caramel with PGI assured meats from local livestock farms.

Flour is fundamental to all Henllan products. Key to their choice of millers is reliable supply, good technical support, swift and reliable deliveries. Henllan currently uses flour from Allied's Coronet mill in Manchester.

Innovation is key to succeeding in the competitive bakery market and Henllan often draws on the millers' technical expertise as they develop new products. Tom says that taking the best advice and feedback on the optimum flours to use for specific applications is invaluable.

For a business proud of its quality products and Welsh provenance, developing local people and using the best of local produce is set to see Henllan continue to expand in the coming years.

“ As a baker, we are bringing lots of different ingredients together, and flour is the cornerstone of what we bake, from bread to muffins, pies to sausage rolls. Flour supply today is exceptional.

“We need a reliable, consistent product to give us stable baking performance. And that's exactly what we get. Having the mill relatively close by in Manchester is ideal, giving us quick response when we place orders, with turnaround normal in under 24 hours.”

Director Tom Moore

Tom cites millers' use of directly employed drivers as an added benefit of working. Delivery of flour in tankers, with pressurised discharge demands the skilled, professional drivers that Allied employs.

Henllan is securing its future with ongoing investment in the bakers of the future. Ten years ago, the business began recruiting and training apprentices. It's a move that has paid off with the newer team leaders now drawn from the early waves of apprentices.



THE TOTAL ECONOMIC IMPACT

Aggregating the three types of economic impact, Policy Points analysis estimates that the UK flour milling industry:




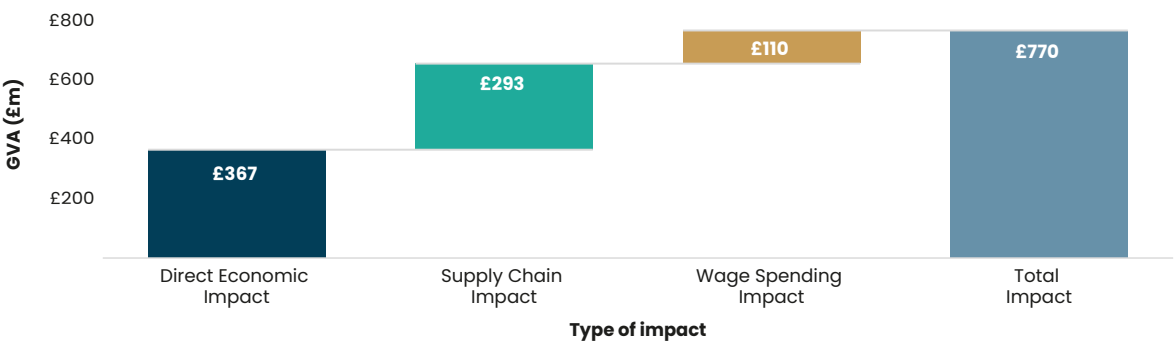
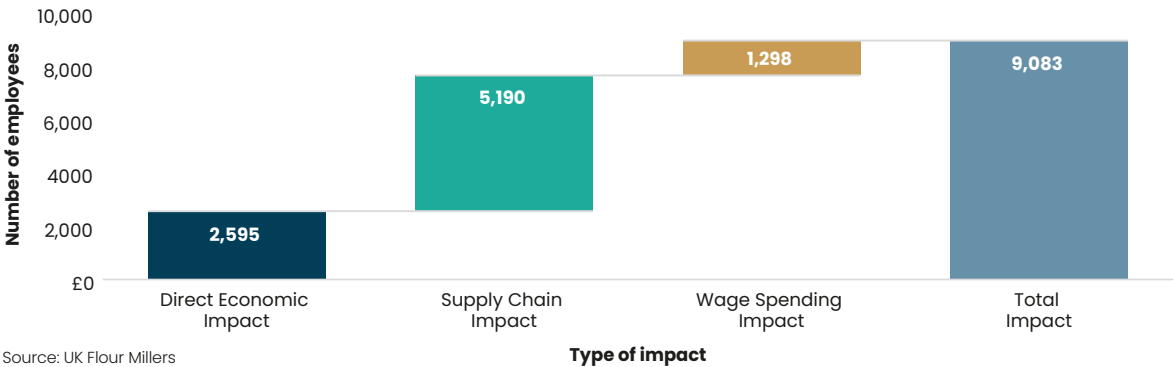
-  **Gross Value Added (GVA):** Contributes value added of £770m to the UK economy (see Chart Six)
-  **Employment:** Supports the employment of 9,100 people (see Chart Seven)
-  **Tax revenue:** Generates tax revenues of £270m for the Exchequer (see Chart Eight)

Chart Six: GVA created by UK flour millers, split by type of impact, £m



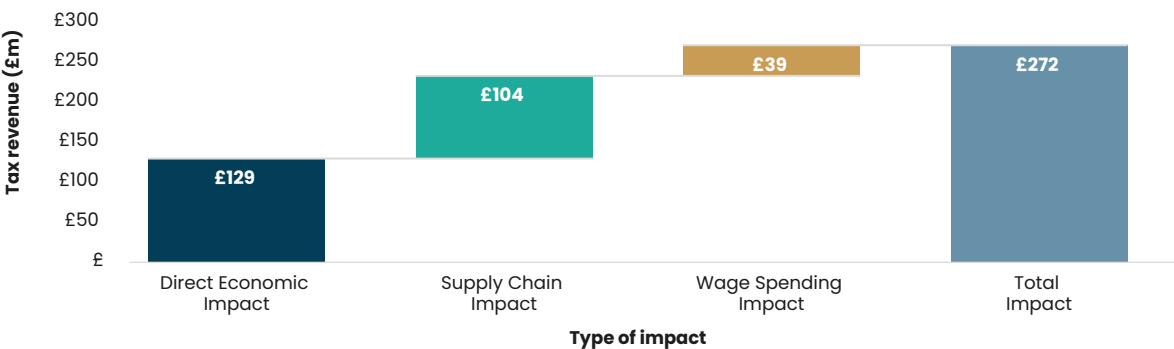
Source: UK Flour Millers

Chart Seven: Employment created by UK flour millers, split by type of impact



Source: UK Flour Millers

Chart Eight: Tax revenue generated by UK flour millers, split by type of impact, £m



Source: UK Flour Millers

The story of a milling apprentice – Bradshaw's East Yorkshire

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The future of UK flour milling

The key messages about the UK flour milling industry from the preceding chapters are:

- **A pivotal, strategic industry with a large impact.** There are few domestic industries that can legitimately claim that their product is consumed in virtually every household in the country. But flour milling is certainly one of them.
- **An ecosystem that needs protecting.** Without the UK flour milling industry the UK food value chain would be less secure. Moreover, its relationships with both the agriculture and bakery sectors are valuable and mutually beneficial.
- **A billion pound plus economic impact.** Flour milling is worth over £2bn in turnover, contributes almost £700m in value add to the economy, supports the employment of over 9,000 people and generates £270m in tax for the Exchequer.

A supportive policy environment is needed if the UK flour milling industry is to continue to deliver and to grow its economic impact in the future. This is particularly true in five areas:



Supporting food security. The self-sufficiency of the UK flour milling industry is dependent on domestic wheat growers. UK farming needs a supportive policy environment if it is to continue to be viable for them to grow wheat profitably and sustainably; solar farms and residential development are already competing with wheat for space on farmland.



Supporting international competitiveness. The role and needs of the flour industry should be considered when renegotiating free trade deals with low-cost countries. For instance, there should be no change to tariffs in a new FTA with Turkey, the world's largest flour exporter.



Supporting innovation. The UK flour milling industry's innovation networks include researchers, plant breeders, farmers and bakers working to improve sustainability and health. A pro-innovation business environment – including a tax system that encourages research and development – is critical for this to happen.



Support for the ongoing energy transition. The milling industry is energy intensive; progressively improving performance is an ongoing priority for millers. Currently millers benefit from support under both the Energy Intensive Users scheme and the Climate Change Levy discount. Continuation of these policies will ensure that industry is not burdened with higher energy costs as the system becomes progressively greener, keeping prices of flour competitive.



Training. Millers are highly skilled and benefit from ongoing, specialist training, through courses provided by the UK flour millers' trade association. Currently, while millers pay the apprenticeship levy, they are unable to access the funds to support the training of its future workforce. Ending this situation will enable the flow of further funds into industry training.

Methodology

The Data City – a technology company – has developed a methodology and platform to map the UK's emerging economy. It uses a machine-learning algorithm to produce RTICs. Company websites that represent an industry of interest are fed into the platform to identify a common language. This data then 'trains' the algorithm to identify companies that describe similar activity. The process happens several times, excluding companies that are irrelevant to the sector and enhancing the training. The result is a database that includes the companies that use the same sector-specific language. More detail on the RTIC development process is as follows:

- **Build a taxonomy.** To build an RTIC that represents an industry effectively, it is key to articulate the industry in pockets of activity (industry verticals) that share language patterns.
- **Data/RTIC production.** The information collected to define the taxonomy leads to the classification of companies in different sectors. One machine learning list is created for each vertical identified in the taxonomy. This is an iterative process that requires: updating the training data, expert review and publication of the data.
- **Quality assurance.** The Data City's quality assurance processes includes: accuracy of the URL-company match, accuracy of the machine learning classification method at the RTIC level, accuracy of the machine learning classification method at the vertical level.

The analysis within this report did not create an RTIC. Instead, it used the Data City platform to draw financial information from flour milling companies to inform the analysis.¹⁰

More information on RTICs and Data City can be found here: <https://thedatacity.com>

Using the Data City information, the following process was followed to understand the economic impact of the UK flour milling industry:

- Adjust company data for those firms that have flour milling as one part of their operations (adjustments were made in consultation with the relevant flour millers).
- Apply GVA estimates using GVA/Turnover ratios of relevant industries. Taken from ONS Annual Business Survey estimates of turnover and GVA in the "Manufacture of grain mill products, starches and starch products" sector.²⁴
- Apply output and employment multipliers to the direct impact of the industry, using industry SIC 10.6 – "Grain milling and starch" – as the reference industry.²⁵
- Apply further analysis to the numbers including tax/GVA ratio taken from OECD figures.²⁶



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