



ANNUAL REVIEW 2025

MILLING... THE ESSENTIAL INGREDIENT



UK FLOUR
MILLERS

Introduction

CARR'S
FLOUR MILLS
• GETTING THE BEST OUT OF WHEAT •

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The flour milling industry is the backbone of UK food security, supplying a key ingredient for the energy and nutritional needs of 70 million people.

Millers are investing and developing continually, delivering quality products sustainably, at competitive prices. The industry is made up of some of the most modern flour mills in the world. They operate 24 hours a day, seven days a week, to provide bakeries, food manufacturers, restaurants and retailers with the essential ingredient to feed the nation.

We are part of a supply chain consuming around a third of the UK's annual wheat harvest, making us a major customer of British farms.

The long-term success of the industry is founded on continual investment in people, technology and innovation, all of which makes it one of the most productive in the country and sustains the UK's self-sufficiency in milling.

Highlights and 2025 key stats



Launching the first economic impact report, which found our industry is amongst the most productive in the UK in terms of value-add per employee, a position built on substantial and ongoing investment of more than £300 million over the last ten years.



We coordinated the transition to fortify flour with folic acid with government and customer stakeholder organisations, delivering a smooth and communicated transition early within the window for doing so.



Driving consumer awareness of the health benefits of fibre in staples like flour and bread through our first Fibre February influencer & journalist event.



Hosting Development Group members at FarmED, a specialist demonstration farm and education centre in the Cotswolds, to build understanding around how we can accelerate the transition to sustainable and regenerative farming.



Publishing our official Sustainability Strategy and a corresponding Sustainability Agenda, to set out and drive forward a sector-wide commitment to environmental, social, and economic progress across the UK milling industry.



Celebrating our inclusive and diverse workforce through the first "Women in Milling" event, with speaker Judith Batchelar OBE, bringing together people across sales, operations, and technical roles, fostering networking and career growth.






3.8m
TONNES OF FLOUR PRODUCED

3.3m
TONNES OF BRITISH GROWN WHEAT PROCESSED

£300m
INVESTED IN THE LAST TEN YEARS

+£1.8bn
ANNUAL TURNOVER

+2,500
PEOPLE EMPLOYED



UK flour milling is an essential industry...



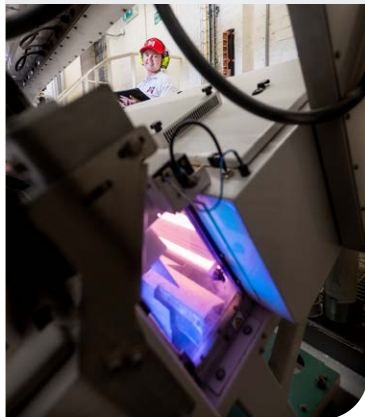
FEEDING THE NATION

One in three grocery items in supermarkets are made with wheat flour – from bread, pasta and cereal to soups, sausages and sauces. Wheat flour is a significant contributor not just of energy, but of essential vitamins and minerals too. A third of the fibre and calcium we consume comes from flour, along with 30% of our iron intake.



DRIVING PRODUCTIVITY

UK flour millers are continuously investing in their operations both in new mills and new technology sustaining and improving existing mills. Over the last ten years investment in new mills and technology has exceeded more than £300 million, underpinning our position as one of the most productive industries in the UK.



PROVIDING SKILLED JOBS

Our industry is founded on a skilled and expert workforce, from millers to laboratory testers, product developers to wheat buyers, truck drivers to finance experts. Collectively, UK flour millers employ more than 2,500 people, with some 30 apprentices learning in mills across the country.



DELIVERING FOOD SECURITY

As a nation we are self-sufficient in our production of flour, an essential ingredient for food producers and part of the country's £5 billion a year food and drink sector, the single largest in manufacturing. UK flour milling provides a critical link between farm and fork, using over 80% domestically sourced wheat and enabling 97% of households to buy flour-based products.



Flour is produced as part of a vibrant farming, milling and baking supply chain. As a primary or secondary ingredient in more than a third of the food on supermarket shelves, flour is the cornerstone of UK food security and fuelling a healthy and productive population – both crucial to the Government's ambitions for long-term economic growth.

Almost all households in the UK rely on bread as part of their diets, and the majority (60%) of the flour we supply goes to large-scale, plant bakeries producing this staple. A significant proportion of flour is used in other products like wraps, snacks and soups. Pre-packed flour, used for household baking, remains an important market. UK milled flour is also needed for specialist ingredients including batters and coatings. All our members innovate actively, improving existing products and developing new ones to suit changing customer needs and behaviour.

EVERY DAY IN THE UK, OUR FLOUR IS USED TO MAKE:

12m
LOAVES

5m
CAKES & BUNS

4.5m
PACKETS OF BISCUITS

2m
PIZZAS

President's message

Food security is critical for national growth and stability and we are proud to produce the essential ingredient for the UK's nutrition. The UK is essentially self sufficient in wheat flour production – a valuable strategic bulwark against geopolitical uncertainty.

That is why we are calling on Government to ensure that the UK's strength in flour production is not given away in free trade negotiations with the world's largest flour exporter, Turkey.

Milling is an integral part of the food system and our strength as flour producers is matched by our farming, milling and baking supply chain partners. We are committed to seeing their operations strengthen over the long term to help build national resilience. The Land Use Planning Framework offers welcome support for maintaining UK food production, while continued focus on driving down energy consumption is essential for both millers and bakers, with the Middle East conflict causing unprecedented spikes in costs.

We are doing our part to reduce energy consumption and as a sector we continue to pursue greater sustainability in our own operations, and in the wheat we bring in for milling. We were proud to publish our sector sustainability strategy last year.

As a trade association our success is founded on the commitment to collaboration on shared issues within the industry, and the strength of the partnerships we build with Government, supply chain and other partners. To assess our progress in building closer working relationships we commissioned an independent stakeholder survey.

We were pleased to see that stakeholders no longer described our sector as 'invisible' (a finding of prior reports). In fact, our messaging about the importance of flour in national food security is cutting through and stakeholders enjoy – and are keen to continue – working closely with us.

But there is more to do. A critical national asset like flour milling needs to be valued and nurtured by the country. Over the coming year, we will continue to broaden and deepen our relationships with key partners, so the industry is well placed to play its role for the UK – nourishing communities and sustaining livelihoods.

I am passionate about continuing to drive our Health and Safety standards forward, and on the topic of training I have a clear focus on the importance of further developing our industry wide training to support all our colleagues on developing their careers in the milling industry. A key focus here is the digitalisation of our craft skills certificate where colleagues can demonstrate their practical skills across various areas with the milling process.

Mike Peters
President

“
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”



Mike Peters
President,
UK Flour Millers

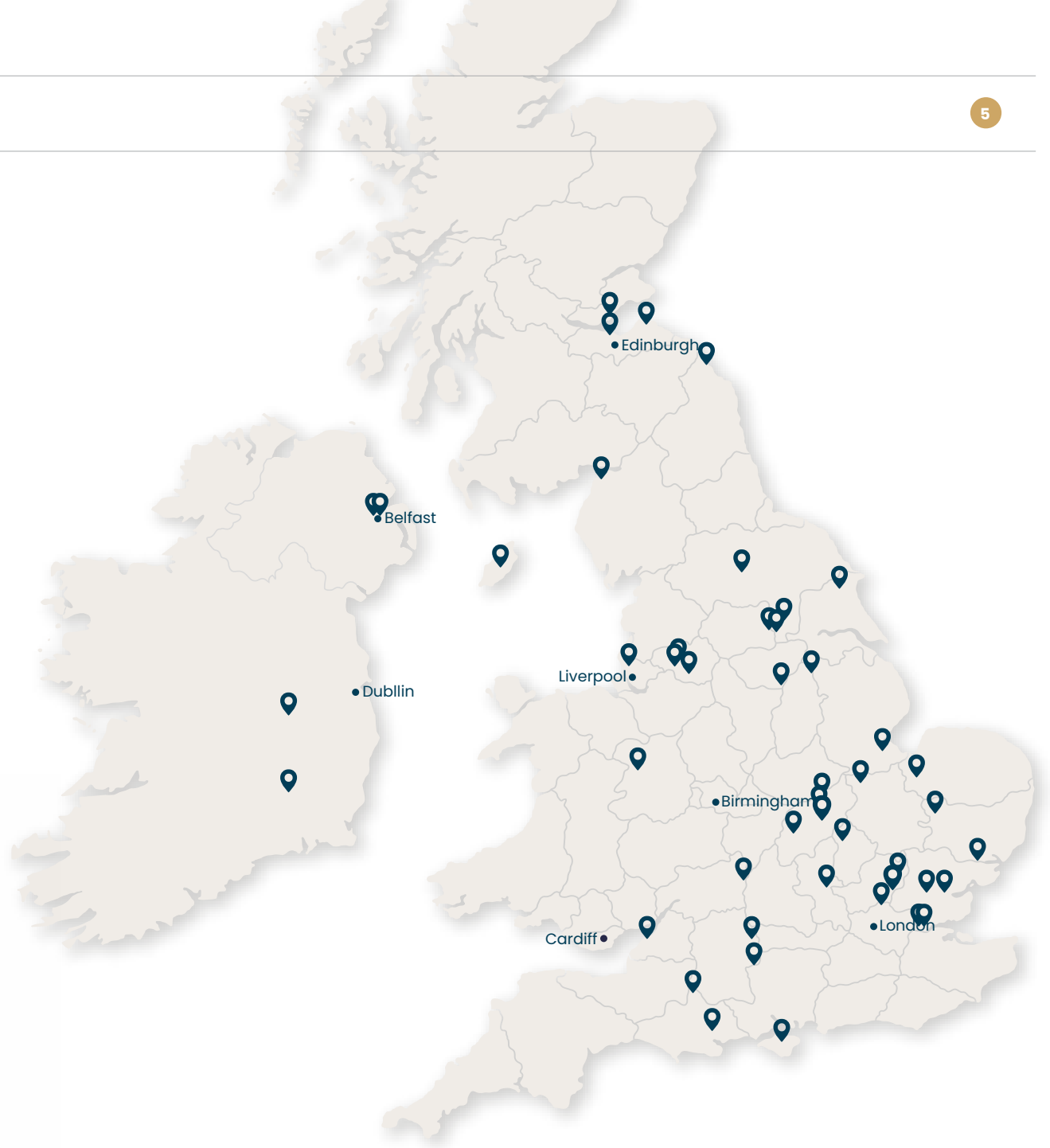
About the industry

UK flour milling is one of the most productive industrial sectors in the country, with a Gross Value Added (GVA) per employee of £141,000 as of early 2025. This is more than double the UK economy average of £64,000.

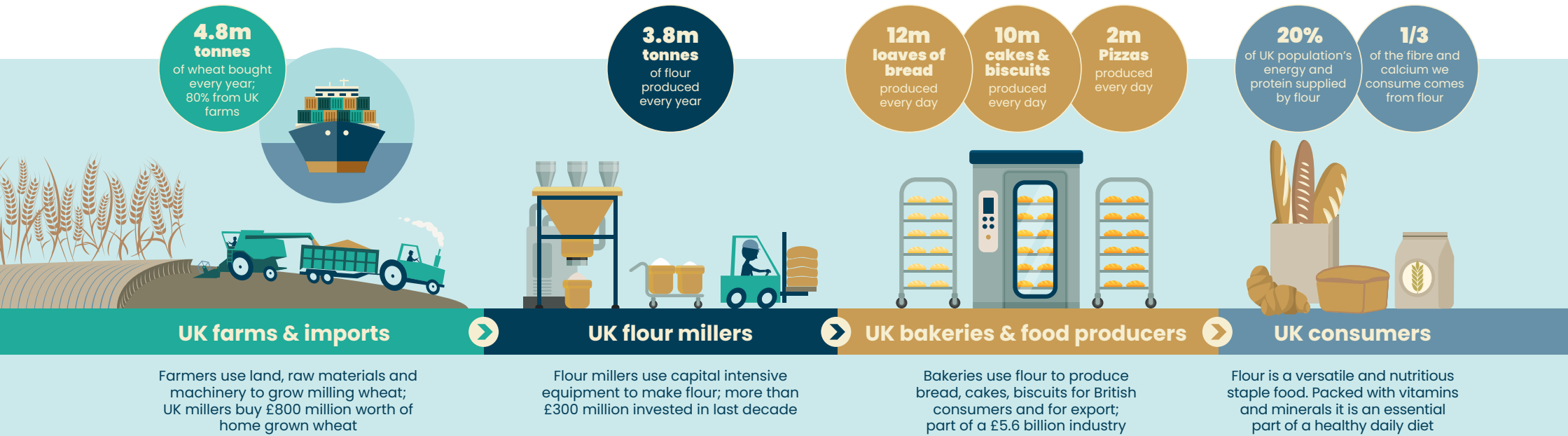
The mills provide jobs across the country, from Edinburgh to Belfast, Whitley Bridge to the Isle of Wight.

32 UK flour milling companies operate 51 mills, with the four largest companies accounting for two thirds of flour production. These mills, many of which are family-owned, have often been at the heart of their communities for generations, offering stable, long-term employment.

The flours milled range from bulk bread making to stoneground and ancient grains. Many of the smaller millers supply specialist markets, ranging from prepacked flours to those for specific uses, such as flours for speciality breads.



About the industry



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.

What the industry needs for a successful future



Securing food supply and protecting productive arable land.

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 to grow wheat profitably and sustainably; solar farms and residential development are already competing with wheat for space on farmland.



Retaining 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, which is heavily subsidised; 76% of the wheat milled there for export is sourced from Russia, a sanctioned country.



Unlocking investment in 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.



Tackling industrial energy prices.

The milling industry is energy intensive and progressively improving performance is an ongoing priority for millers. Millers benefit from support under the Energy Intensive Users scheme and the Climate Change Levy discount, but we need ongoing action to tackle the UK's industrial energy prices and enable the transition to a cleaner grid.



Directing funding into training.

Millers are highly skilled and benefit from ongoing, specialist training through courses provided by the UK flour millers' trade association. Yet while millers pay the apprenticeship levy, they are unable to access the funds to support the training of the future workforce. Ending this situation will enable the flow of further funds into industry training, opening up access to stable, long-term careers to more people.



Reversing changes to Inheritance Tax.

These changes limit the scope for long-term investment for many millers, a large number of which are family-owned businesses. This is a drag on continuing the investment that has been key to the industry's growth and development in recent years. It is also harmful to the UK farmers in our supply chain, when the focus needs to be on continuing innovation to respond to the challenges of climate change, furthering habitat stewardship and progressively making the industry less carbon intensive.



About the Association

As the trade association, UK Flour Millers supports the efficient and reliable operation of the industry, serving our members and working with the wider supply chain and stakeholders.

We do this by:

- Being the voice of the industry with government, policy makers, the media and other stakeholders
- Engaging in key policy areas such as energy and trade to support the industry's competitive position, in the supply chain
- Engaging with partners around trade policy to ensure supplies of quality grain for milling
- Providing bespoke training for members' employees, offering a staircase from entry level to preparing for senior management, in the UK and overseas
- Hosting industry events to facilitate networking and exchange of best practice
- Advancing the collective technical needs of the industry, from grain supplies to milling and sales
- Supporting the industry drive for continual improvement in health and safety performance
- Driving the sustainability agenda, both within the industry and in the wider supply chain
- Commissioning appropriate research and development that will benefit the industry and wider supply chain



GOVERNANCE

The operation of UK Flour Millers is overseen by an Executive Committee. The Executive is representative of member companies from multinationals to family-run businesses. A president is elected at the AGM, normally for a term of two years, along with the vice president and treasurer. Our other committees and working groups cover specific areas of activity. They are the main mechanism for discussion and development of policy. Membership of the committees is drawn from amongst our miller members.

Our committees and working groups:

- Communications Committee
- Development Group
- Environment Working Group
- Executive Committee
- Health & Safety Committee
- Horizon Scanning Group
- Policy Development Working Group
- Pre-Packed Flour Committee
- Technical and Regulatory Affairs Committee
- Training Committee
- Varieties Working Group
- Wheat Committee

WHEAT USAGE AND ORIGIN DATA

Year	Thousand tonnes	Origin (%)			Non-UK origin (%) - more specific breakdown				
		UK	EU	3rd country	Germany	France	Canada	US	Other
2024/25	4,819	68.7%	17.9%	13.5%	17.3%	0.4%	13.4%	<0.1%	0.3%
2023/24	4,907	77.9%	10.5%	11.6%	10.2%	0.2%	11.6%	<0.1%	0.1%
2022/23	4,852	82.7%	6.1%	11.2%	5.8%	0.2%	11.0%	0.2%	0.1%
2021/22	5,017	80.5%	9.6%	10.0%	9.3%	0.3%	9.9%	0.0%	0.1%
2020/21	4,866	72.8%	16.5%	10.7%	15.2%	0.5%	10.2%	0.4%	0.9%
2019/20	4,955	86.1%	4.1%	9.7%	3.2%	0.9%	9.2%	0.4%	0.1%
2018/19	4,952	85.1%	5.8%	9.1%	4.4%	1.4%	7.3%	1.7%	0.1%
2017/18	5,022	83.9%	6.8%	9.4%	4.8%	1.9%	7.2%	2.1%	0.1%

Source: UKFM wheat usage and import survey

FLOUR PRODUCTION

	2023-24		2024-25	
	000 t	%	000 t	%
Total				
Breadmaking	2,692.0	69.9%	2,643.8	69.9%
Biscuit	530.2	13.8%	547.2	14.5%
Cake	122.0	3.2%	81.5	2.2%
Household	192.6	5.0%	194.0	5.1%
Ingredient	314.0	8.2%	315.4	8.3%
Total	3,850.8		3,782.0	

Source: AHDB wheat usage survey and UKFM pre-packed flour sales survey

WHEAT USAGE AND ORIGIN DATA

UK Exports	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Flour	220,097	234,975	239,522	241,609	229,547	184,717	145,581	239,202	210,619	208,571	199,931
Mixes & doughs	72,580	67,670	83,742	124,274	120,338	94,685	64,891	67,311	60,262	61,222	60,035
Bread	104,140	110,563	105,695	97,946	93,490	86,806	90,712	84,609	80,456	90,144	98,913
Biscuits	163,184	146,674	154,951	160,209	171,813	171,481	148,937	152,576	134,486	140,807	136,123

Source: UK trade info (HMRC)





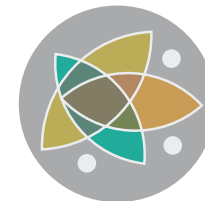
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