

# The Power of Flour

International Association of Operative Millers

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North American Millers' Association



# What we'll discuss

- ❖ North American Millers' Association (NAMA) – past, present, future
- ❖ The Power of Flour – a grassroots advocacy effort to shape policy

# History of NAMA

- ❖ Created in 1998
- ❖ Combination of the National Millers Federation, American Corn Millers Federation, American Oat Association and the Protein Grain Products International - representing the wheat, corn and oats milling industries and the international trade of milled flour.
- ❖ Mission Statement: “NAMA enables its members to grow and prosper by providing leadership through education, information and advocacy to members, policy makers, customers and suppliers in the areas of regulation and legislation, trade, supply and consumption.”

# Current state – change!

- ❖ 45 members in 38 states, Canada & Puerto Rico; 25 Associate Members
- ❖ 170 Mills representing 90% total industry production
- ❖ Roughly 80,000 Metric Tons per day
- ❖ Growth in volume produced
- ❖ Sea Change -- Consolidation and mergers

# Top ten millers: 1990

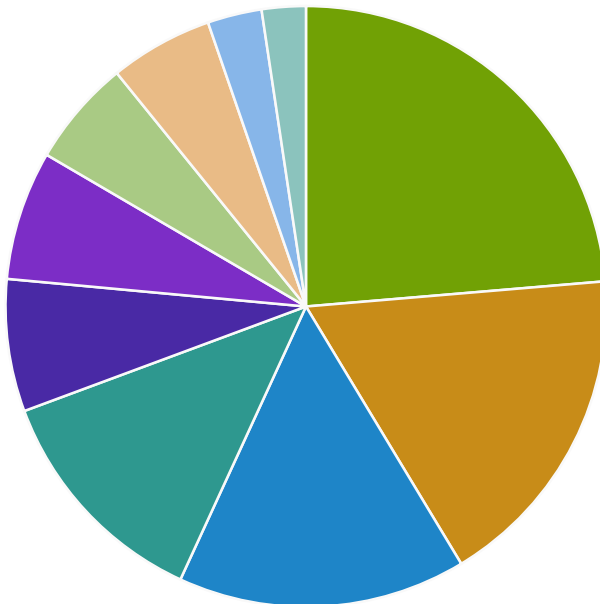
<b>MILLER</b>	<b>CAPACITY</b>	<b>PERCENT OF INDUSTRY</b>
ConAgra, Inc.	226,900	19.8%
ADM Milling Co.	169,700	14.8%
Cargill, Inc.	148,700	13.0%
The Pillsbury Co.	119,700	10.4%
Cereal Food Processors	68,300	5.9%
General Mills, Inc.	66,700	5.8%
Dixie Portland Flour Mills	55,000	4.8%
Bay State Milling Co.	53,250	4.6%
Nabisco Brands	28,000	2.4%
Mennel Milling Co.	22,700	2.0%

# Top ten millers: 2014

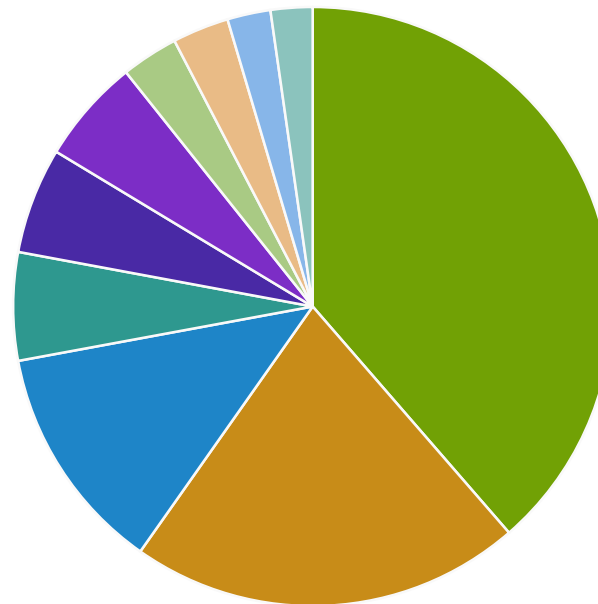
MILLER	CAPACITY	PERCENT OF INDUSTRY
Ardent Mills	513,600	34.4%
ADM Milling	281,100	18.9%
Grain Craft	164,000	11.0%
General Mills	77,500	5.2%
Miller Milling-Nisshin	76,100	5.1%
Bay State Milling	75,100	5.0%
Mennel	40,900	2.7%
Bartlett Milling	40,500	2.7%
Kraft Foods	31,000	2.1%
North Dakota Mill	30,000	2.0%

# Milling industry changes since 1990

1990



2014



- Ardent Milling
- ADM Milling
- Milner Milling
- General Mills
- Miller Milling-Nisshin
- Bay State Milling
- Mennel
- Bartlett Milling
- Kraft Foods
- North Dakota Mill

# NAMA video



# Food Safety

- ❖ Food Safety Modernization Act (FSMA)
  - ❖ FDA recently announces two final rules
  - ❖ E. coli pathogen recall / peanut allergen recall
- ❖ GMO Labeling Legislation
  - ❖ Coalition for Safe, Affordable Food
  - ❖ GMO Labeling
- ❖ CODEX DON proposed standard
  - ❖ NAMA led coalition working to change the standard

# Nutrition

- ❖ US Dietary Guidelines (2016/2020)
  - ❖ NAMA and Grain Chain Coalition submitting comments
- ❖ School Lunch and Meal Programs /Child Nutrition Reauthorization
  - ❖ NAMA working with the Grain Chain for grains in program
- ❖ Gluten Free Movement
  - ❖ NAMA working with WFC and GFF to set the record straight
- ❖ Grain Foods Foundation Research

# Supply chain

- ❖ Rail Supply Issues – NAMA's actions
  - ❖ Agriculture Transportation Coalition
  - ❖ Surface Transportation Board
  - ❖ Working with Canadian allies

# Other activities + partnerships

- ❖ Research – wheat & barley scab initiative, Oat Global/oat crown rust, Vitamin D Petition, etc.
- ❖ Education – IAOM, Kansas State University
- ❖ Food aid – PL-480 Program
- ❖ Partnerships – WFC, GFF, etc.

# NAMA's role

- ❖ Ensure the interests of our members are well represented before government.
- ❖ Promote the adequate supply of quality grains.
- ❖ Provide timely information to our members and allies.
- ❖ Increase public awareness of our products.
- ❖ Support the increased consumption of our products.

# NAMA Grassroots Lobbying

- ❖ Grassroots program to collectively and powerfully add our voice to the conversation
- ❖ Get involved with “the power of flour”
  - ❖ How does it work?
  - ❖ What does it involve?

# Conclusion

- ❖ NAMA's history
- ❖ Where we are now
- ❖ Where we are going – the future of the industry
- ❖ “The power of flour” -- how you can support the industry
- ❖ THANK YOU!