Flour Milling

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INDUSTRY PROFILE

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INDUSTRY PROFILE

1990–1991

FLOUR MILLING

FOREWORD

In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to growth and prosperity. Promoting improved performance by Canadian firms in the global marketplace is a central element of the mandates of Industry, Science and Technology Canada and International Trade Canada. This Industry Profile is one of a series of papers in which Industry, Science and Technology Canada assesses, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological, human resource and other critical factors. Industry, Science and Technology Canada and International Trade Canada assess the most recent changes in access to markets, including the implications of the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the profiles.

Ensuring that Canada remains prosperous over the next decade and into the next century is a challenge that affects us all. These profiles are intended to be informative and to serve as a basis for discussion of industrial prospects, strategic directions and the need for new approaches. This 1990–1991 series represents an updating and revision of the series published in 1988–1989. The Government will continue to update the series on a regular basis.

Michael H. Wilson
Minister of Industry, Science and Technology
and Minister for International Trade

Structure and Performance

Structure

The flour milling industry comprises firms that primarily mill wheat and other cereal grains into flour, mill feed (used for animal feed) and other products (rolled, flaked or de-hulled). Some firms also blend flour into bakery mixes. The industry is closely linked (and in some cases integrated through ownership) with the baking, biscuit and breakfast cereal manufacturing industries, which collectively use more than 50 percent of all milled cereal products consumed in Canada. Milling by-products (mill feeds) are sold primarily to the animal feed industry. Further details on some of these related industries are available in industry profiles on

- *Bakery Products*
- *Biscuits*
- *Livestock and Poultry Feeds*
- *Pet Foods*

Flour millers provide a market for about 10 percent of Canadian milling wheat production. Wheat is delivered to the mills through an integrated grain handling and storage system. Approximately 90 percent of milling wheat is exported rather than being milled domestically. Flour and mill feeds are produced primarily for the Canadian market.

The flour milling industry produced about 2.4 million tonnes of flour and mill feeds in 1991, having a value of $686 million (Figure 1). Exports of flour and other milled products such as oat bran, rolled oats and by-products were valued at $67 million in 1991. Imports of flour and other milled products amounted to $9 million in 1991.

In 1992, there were 43 mills operating in Canada, including subsidiaries of multinational companies and two

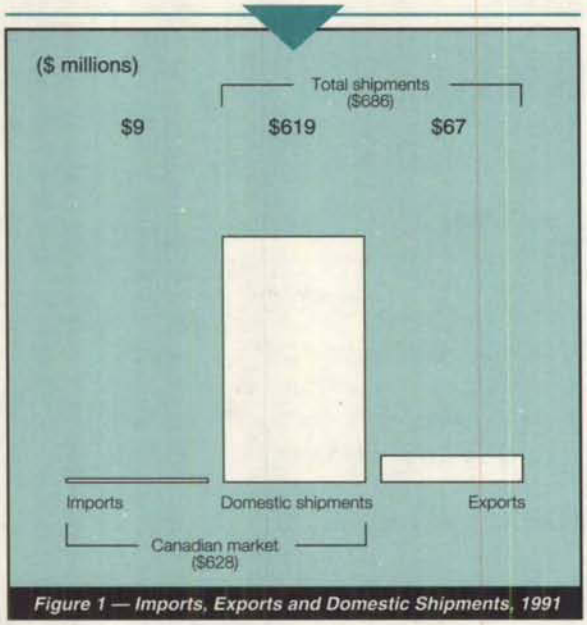

Figure 1 — Imports, Exports and Domestic Shipments, 1991

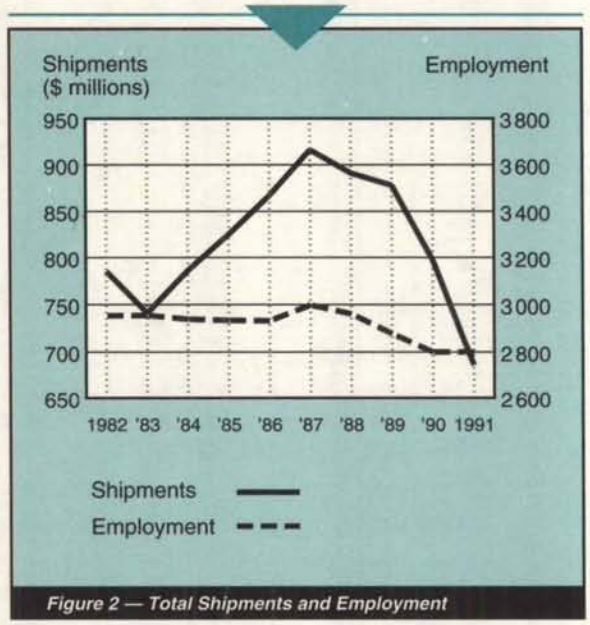

Figure 2 — Total Shipments and Employment

mills affiliated with pasta and breakfast cereal manufacturers. The three largest firms, which are foreign-owned, operated 13 establishments, representing approximately 70 percent of total Canadian milling capacity. Total employment in the flour industry is estimated at about 2 800 people for 1991.

The Canadian flour milling industry is regionally concentrated. Some 70 percent of establishments are located in Ontario and Quebec, 22 percent are in the Prairie provinces, 5 percent are in British Columbia and 3 percent are in the Atlantic provinces. Ontario milling capacity is situated in southern and central Ontario outside Toronto, while Quebec's industry is located in Montreal.

The market concentration of the industry is more than matched by the marketing structure of its key material input — grain. The Canadian Wheat Board (CWB) and the Ontario Wheat Producers' Marketing Board control supplies of Prairie and Ontario wheat and set prices charged to domestic millers. Prices of both flour and grain are also influenced by the *Western Grain Transportation Act* (WGTA), which equalizes transportation costs of both grains and products from more distant sources to Thunder Bay and Vancouver.

Performance

The Canadian share of world trade in flour has declined from roughly 20 percent in the early 1970s to 4 percent in 1989. This loss of market share occurred when former customers developed their own milling capacity. The remaining export markets are dominated for the most part by the European Community (EC) and the United States, which have extensive subsidy and export credit programs. EC export subsidies have led to the loss of Canada's major export market, Cuba, leaving remaining offshore shipments mainly in the form of food aid. Between 1982 to 1991, exports of flour fell from $129 million to $67 million.

The Canadian market for flour has been stable, with some increase in per capita consumption in recent years. Employment remained steady between 1982 and 1991 (Figure 2). The value of shipments rose between 1983 and 1987, but the rise was largely caused by wheat price increases. Certain firms have diversified into bakery mixes in an effort to add value and respond to a growing segment of the flour market. The majority of industry shipments are to bakeries. Packaged flour, sold through retail outlets, accounts for a small percentage of sales.

The industry's facilities are in a process of adjustment. Many owners of older and inefficient Canadian mills cannot justify capital expenditures for facility modernization and replacement. Six old mills have been closed in the past five years. However, the industry has also invested in four new and modernized mills to better serve the Canadian and U.S. markets.

Strengths and Weaknesses

Structural Factors

International competitiveness in the flour milling industry requires high-quality raw materials at competitive prices (wheat accounts for 75 percent of the value of flour), efficient

milling technology with a high utilization of capacity and a cost-competitive transportation system to deliver the product to market.

Canada produces ample supplies of high-quality wheat, with strict grade standards maintained by the Canadian Grain Commission. Wheat grown in Western Canada consists mainly of the hard varieties (having relatively high protein levels) largely used in making bread. Durum wheat, also grown in Western Canada, has an even higher protein level than the bread wheats and is used in pasta production. Soft wheat, grown primarily in Ontario, has a lower protein level and is suited for cake and pastry flours. Hard wheat accounts for approximately 80 percent of wheat milled in Canada, followed by soft wheat at 12 percent and durum wheat at 8 percent.

High-quality wheat with a high protein content is valued in flour production. Advances in milling technology, however, are making it possible to produce good-quality flour from lower-protein wheat. This process is done through the blending of wheat grist and flour and the addition of gluten, a protein supplement. Lower-protein wheat satisfies the protein requirements and baking specifications of certain export markets. At times, the Canadian milling industry is not able to purchase lower-protein wheat. Hence, the Canadian industry is at a disadvantage when it tries to compete with European countries for export markets. It also faces a disadvantage in domestic markets where such products as bread compete with lower-quality but cheaper imports.

The Canadian milling industry purchases wheat primarily from the CWB or the Ontario Wheat Producers' Marketing Board. The Canadian National Millers Association has negotiated a daily pricing mechanism for domestic wheat sales with the CWB. This mechanism allows Canadian millers to purchase Canadian wheat at prices based on U.S. wheat of comparable quality. Canadian millers can now hedge wheat purchases on U.S. futures markets to protect against price changes.

Flour milling is a capital-intensive operation. The Canadian milling industry largely serves a relatively small and fragmented domestic market that requires mills to produce for a wide variety of end uses. Canadian milling technology is appropriate to its diversified market and to the raw material mix at its disposal. With reductions in export markets, Canadian producers have become domestically oriented and face increased competition in Canada following the lifting of import controls.

Canadian mills operated at about 75 percent of their capacity (based on a potential of three shifts per day for six days each week) throughout the 1980s and early 1990s. This poor utilization of mill capacity is greatest in Western Canada. It reflects the continued erosion of world markets for commercial flour from Canada. Meanwhile, because of export subsidies and food aid programs, the U.S. industry has been operating at 85 to 95 percent of its six-day rated capacity in recent years.

Grain transportation costs influence milling operations. Canadian mills pay the lesser of the Thunder Bay or Vancouver price minus the producer's share of transportation costs from the prairie to dockside. U.S. mills across the border pay local prices. The resulting grain prices have been about 10 percent higher in Western Canada than in the United States. Recently, the CWB has succeeded in reducing the gap to about 5 percent.

Trade-Related Factors

The Canadian tariff on wheat flour from countries having Most Favoured Nation (MFN) status is $5.62 per tonne. The Canadian MFN tariffs on bakery mixes range from 7.5 to 10 percent ad valorem. The U.S. MFN tariff on flour is US$11 per tonne, while that on bakery mixes is 10 percent ad valorem. There are no Canadian or U.S. duties on mill feeds.

Under the Canada-U.S. Free Trade Agreement (FTA), both countries have agreed to eliminate these tariffs on imports from each other in 10 annual, equal stages, beginning with the implementation of the Agreement on 1 January 1989. Hence, the 1992 tariff on U.S. wheat entering Canada was $3.36 per tonne, while those on bakery mixes were 4.5 to 6 percent. The corresponding rate for Canadian wheat entering the United States was US$6.60 per tonne, and the tariff on bakery mixes was reduced to 6 percent. The FTA also abolished Canadian import licences for wheat and wheat flour in May 1991. Import permits for barley remain.

The EC has a system of variable levies on wheat flour and mill feeds that covers the difference between the price of imported flour and the high EC domestic price. Bakery mixes are subject to a tariff of 11 percent ad valorem plus a variable levy. Japanese tariffs range from 12.5 to 25 percent ad valorem for wheat flour and 16 to 28 percent for bakery mixes. There is no duty on mill feeds.

Non-tariff barriers (NTBs) such as import licences, government-controlled trading and export subsidies have had a great influence on international markets. Both the EC and the United States provide direct export subsidies on flour. The most significant NTBs in countries other than the EC and the United States are import controls through licences or state procurement to protect local flour milling industries.

Technological Factors

A number of flour milling companies in Europe (particularly in the United Kingdom and Switzerland) have adopted electronic process control to such an extent that mills can run for substantial periods of time without human intervention. Canadian mills have adopted some automated process monitoring, but they have stopped short of the fully automated

mill typical of some parts of the more specialized European industry. The marginal rate of payback, based on present capacity utilization and the limited scope for production specialization, has restrained Canadian investment in more extensive automation.

Apart from a saving in labour costs, automated process control can increase extraction rates, reduce waste and provide greater consistency in milling operations. The rate of extraction of flour from wheat tends to be higher in European mills than in Canadian ones. This difference can be influenced by the type of wheat milled and the nature of the market. Canadian millers supply a diversified market. Consequently, they are forced to use split milling (multiproduct) runs, which limit the rate of extraction that can be achieved. A higher rate of extraction enhances milling profitability. Waste from the flour milling process is sold as lower-value end products such as mill feed.

Bran peeling technology, developed by Anglo-Canadian and Japanese sources, represents a major innovation that has the potential to revolutionize the basic flour milling process, offering improved product quality and economies of production. This technology involves the removal of a large portion of the bran, or seed coat, of wheat prior to milling. Advantages include a higher rate of extraction, better-quality flour, higher-value by-products, lower capital costs and shorter milling time. At the time of writing, commercial equipment systems incorporating this process were just becoming available.

Evolving Environment

The consumer market for household or bagged flour does not offer a potential for industry expansion, since population growth is slowing and home baking is becoming less popular. However, consumption of bakery flour and bakery mixes continues to increase, providing market expansion and increased value-added for flour millers. Greater integration of the industry with bakery and retail outlets will increase returns.

There are two export markets for milled grain products — a commercial market and a food aid market. The commercial export market will continue to be dominated by the United States and the EC as long as both continue to provide their millers with export subsidies and extensive export credit programs. This situation could change if progress is made in reducing export subsidies during the Uruguay Round of the Multilateral Trade Negotiations under the General Agreement on Tariffs and Trade (GATT).

The food aid market has become increasingly more important to the Canadian milling industry as subsidized competition from the EC and the United States intensifies in the commercial export market. At the same time, milling capacity in developing countries is expanding and their import demand is shifting from flour to whole grains. As a result, the rate of capacity utilization in the Canadian milling industry may decline.

The erosion of export markets, the low utilization of mill capacity and the age of older facilities are the major competitiveness issues for the industry. Emphasis will be placed on increasing the use of existing mill capacity, milling efficiency and value-added in the industry as well as on reducing unit administrative and selling costs. The number of mills may decline. The remaining mills will likely feature capital-intensive automation and greater competitiveness.

The advent of the FTA means increased opportunities and competition for both U.S. and Canadian mills. U.S. mills in the border states currently operate at higher capacity utilization rates, have access to lower-priced wheat and often benefit from lower transportation costs than do their Canadian competitors. These factors currently provide the U.S. mills with a strong cost-competitive advantage.

Canadian mills have a competitive advantage in quality. They have a higher-quality wheat, which yields a higher-quality flour. Products made from this flour place the mills in a position to exploit niche markets in the United States.

The structure of the industry is becoming more international. John Labatt has sold Ogilvie Mills to Archer Daniels Midland Co. (ADM) of Decatur, Illinois. Recently, two other Canadian mills have also been purchased by ADM.

In an attempt to harness the best of both Canadian and U.S. advantages, Maple Leaf Foods of Toronto, Ontario, which owns 100 percent of Maple Leaf Mills, one of Canada's largest millers, has formed two joint ventures with ConAgra of Omaha, Nebraska. These joint ventures are using ConAgra's buying power as the second-largest U.S. food company to lower wheat costs and its technology to decrease milling and transportation costs. These joint ventures operate a mill in Buffalo and mills in Calgary, Montreal and Port Colborne.

On 12 August 1992, Canada, Mexico and the United States completed the negotiation of a North American Free Trade Agreement (NAFTA). The Agreement, when ratified by each country, will come into force on 1 January 1994. The NAFTA will phase out tariffs on virtually all Canadian exports to Mexico over 10 years, with a small number being eliminated over 15 years. The NAFTA will also eliminate most Mexican import licensing requirements and open up major government procurement opportunities in Mexico. It will also streamline customs procedures, and make them more certain and less subject to unilateral interpretation. Further, it will liberalize Mexico's investment policies, thus providing opportunities for Canadian investors.

Additional clauses in the NAFTA will liberalize trade in a number of areas including land transportation and other service sectors. The NAFTA is the first trade agreement to contain provisions for the protection of intellectual property rights. The NAFTA also clarifies North American content rules and obliges U.S. and Canadian energy regulators to avoid disruption of contractual arrangements. It improves the dispute settlement mechanisms contained in the FTA and reduces the scope for using standards as barriers to trade. The NAFTA extends Canada's duty drawback provisions for two years, beyond the elimination provided for in the FTA, to 1996 and then replaces duty drawback with a permanent duty refund system.

The NAFTA provisions may increase competition for inputs to flour milling among all participants by opening up Mexico's market to grains. Mexico's import licence requirements on wheat, rye and buckwheat will be eliminated upon the NAFTA coming into force. The NAFTA tariffs on wheat will be eliminated progressively over 10 years, and on rye and buckwheat on 1 January 1994. At that time, specific quantities of barley will be duty-free, with the rest becoming progressively duty-free over the first 10 years of the NAFTA. Beyond the provisions in the FTA, Canada is also removing restrictions on imports of wheat and barley from Mexico.

Tariffs on flour entering Mexico will be phased out over 10 years. Due to high transportation costs, this provision may result in a southward shift in markets rather than large explicit shifts in Canadian exports to Mexico.

Competitiveness Assessment

Canadian mills need to increase their capacity utilization and improve their productivity. They also require greater equality of input prices with U.S. mills.

Canadian mills, whether or not they are competitive in costs and quality, are unlikely to achieve substantial commercial sales offshore until the export subsidies available to U.S. and European producers are discontinued.

For further information concerning the subject matter contained in this profile or in the report listed on page 8, contact

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PRINCIPAL STATISTICS[a]

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
Establishments	41	36	35	39	40	41	43	49	43[b]	43[b]
Employment	2 953	2 955	2 939	2 934	2 932	2 998	2 961	2 878	2 800[b]	2 800[b]
Shipments										
($ millions)	785	741	786	825	867	916	891	878	797	686
(thousands of tonnes)	2 380	2 319	2 420	2 400[b]	2 400[b]	2 400[b]	2 400[b]	2 500[b]	2 300[b]	2 400[b]

[a]For establishments, employment and shipments, see *Food Industries*, Statistics Canada Catalogue No. 32-250, annual (SIC 1051, cereal grain flour industry).
[b]ISTC estimates.

TRADE STATISTICS

	1982	1983	1984	1985	1986	1987	1988[d]	1989[d]	1990[d]	1991[d]
Exports[a] ($ millions)	129	136	179	133	121	105	71	79	75	67
Domestic shipments ($ millions)	656	605	607	692	746	811	820	799	722	619
Imports[b] ($ millions)	19	5	8	10	9	9	6	7	10	9
Canadian market ($ millions)	675	610	615	702	755	820	826	806	732	628
Exports (% of shipments)	16	18	23	16	14	11	8	9	9	10
Imports (% of Canadian market)	3	1	1	1	1	1	1	1	1	1
Canadian share of international market[c]										
(% of commercial sales)	9	5	11	9	10	7	3	4	N/A	N/A

[a]See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.
[b]See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.
[c]Estimates supplied by the International Wheat Council for flour. Data do not include exports by food aid agencies.
[d]It is important to note that data for 1988 and after are based on the Harmonized Commodity Description and Coding System (HS). Prior to 1988, the shipments, exports and imports data were classified using the Industrial Commodity Classification (ICC), the Export Commodity Classification (XCC) and the Canadian International Trade Classification (CITC), respectively. Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in shipment, export and import trends, but also changes in the classification systems. It is impossible to assess with any degree of precision the respective contribution of each of these two factors to the total reported changes in these levels.
N/A: not available

SOURCES OF IMPORTS[a] (% of total value)

	1983	1984	1985	1986	1987	1988[b]	1989[b]	1990[b]	1991[b]
United States	88	88	95	88	85	75	78	88	88
Other	12	12	5	12	15	25	22	12	12

[a]See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.

[b]Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in import trends, but also changes in the classification systems.

DESTINATIONS OF EXPORTS[a] (% of total value)

	1983	1984	1985	1986	1987	1988[b]	1989[b]	1990[b]	1991[b]
United States	9	10	11	13	16	23	15	19	20
Asia	9	28	14	18	18	19	26		
Other	82	62	75	69	66	58	59	81	80

[a]See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

[b]Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in export trends, but also changes in the classification systems.

REGIONAL DISTRIBUTION[a] (average over the period 1986 to 1988)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	3	21	49	22	5
Employment (% of total)	X	28	40	X	X
Shipments (% of total)	X	27	41	X	X

[a]See *Food Industries*, Statistics Canada Catalogue No. 32-250, annual.

X: confidential

MAJOR FIRMS

Name	Country of ownership	Location of major plants
ADM Milling Co. (Archer Daniels Midland Co.)	United States	Montreal, Quebec Midland, Ontario Mississauga, Ontario Strathroy, Ontario Winnipeg, Manitoba Medicine Hat, Alberta
Dover Mills Limited	Canada	Halifax, Nova Scotia Cambridge, Ontario
Maple Leaf Mills Inc./ ConAgra Grain Processing Co. (ConAgra, Inc.)	United Kingdom/United States	Montreal, Quebec (2 mills) Port Colborne, Ontario Calgary, Alberta
Robin Hood Multifoods Inc.	United States	Montreal, Quebec Port Colborne, Ontario Saskatoon, Saskatchewan

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SECTORAL STUDIES AND INITIATIVES

The following report is available from Industry, Science and Technology Canada (see page 5).

Report of the European Flour Milling Technology Mission, 25 October to 4 November 1988
The Canadian National Millers Association led a mission to Europe with representatives of eight Canadian flour milling companies to investigate opportunities for technology transfer. The mission toured six automated European flour mills as well as a major equipment manufacturer.

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