

Folic Acid Fortification Legislation Update

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About the Food Fortification Initiative (FFI)

- We are a non-profit organization that provides technical assistance to public, private, and civic stakeholders globally, helping them to plan, implement, and monitor fortification of industrially milled wheat flour, maize flour, and rice
- 20+ years experience in food fortification
- Based in Atlanta, GA, USA, with regional staff in Africa and Southeast Asia

FFI'S UNIQUE MODEL



Why Fortify?



- Enriching foods with vitamins and minerals is a safe, effective way to improve micronutrient intakes in populations
- Fortification with vitamin B9 (folic acid) is proven to help prevent severe birth defects of the brain and spine
- Fortification of wheat and dry corn products prevents over 1,000 birth defects in the US each year¹

Refresher: 2022-23 MASA INDUSTRY SUPPLY CHAIN

Amount of Corn Ground in the U.S. for Masa Production	
2,710,000	MT / yr

Dry Masa Manufacturing (CMF)

Manufacturer	Annual CMF Volume (MT)	Market Share
Azteca Milling (Grua)	853,000	73%
Bunge	180,000	15%
Ole Mexican Foods	83,000	7%
Dry Corn Ingredients (Cargill)	41,000	3%
LifeLine Foods	19,000	2%
Total	1,176,000	100%

Wet Masa Manufacturing

Manufacturers Name	Masa Product Type	Annual Volume (MT)	Market Share
Frito-Lay / Others	Snacks / Taco Chips	446,000	42%
Tortilla Mfr's	Tortillas, Tostadas, Taco Shells	614,000	58%
Total		1,060,000	100%

Corn Masa Flour Imports

Importers Name	Country of Origin	Total Annual Volume (MT)
Masabrosa	Mexico	15,000
Minsa	Mexico	6,000
Other	Mexico	199,000
Total		220,000

Corn Masa Flour Exports

Country of Origin	Total Annual Volume (MT)	Pct of Total
Canada	36,000	39%
Mexico	17,000	18%
Other	40,000	43%
Total	93,000	100%

U.S. Corn Masa Flour Product Manufacturers

Manufacturer	CMF Product Types	Annual CMF Volume (MT)	Market Share
Mission (Grua)	Tortilla, Snacks	313,000	27%
Ole Mexican Foods	Tortilla	83,000	7%
Others	Tortilla, Snacks	745,000	65%
Total		1,141,000	100%

Corn Masa Product Segmentation

Description	Masa Product Type				Total
	Tortilla	Tostadas	Taco Shells	Snacks / Taco Chips	
Volume MT	1,104,000	53,000	53,000	991,000	2,201,000
Pct	50.2%	2.4%	2.4%	45.0%	100%

Retail Corn Masa Flour

Brand	Manufacturer	Annual CMF Volume (MT)	Market Share
Maseca	Azteca Milling (Grua)	129,000	80%
Maizal	Bunge	9,000	6%
Quaker	Co-packed	3,000	2%
Minsa	Minsa USA (imported)	6,000	4%
Masabrosa	Imported from Mexico City	15,000	9%
Total		162,000	100%

Distribution Channels

Distribution Channels	Market Share
Retail Grocers	52%
Food Service (Restaurants, Schools, Gov't)	41%
Other	7%

Total U.S. Corn Masa Consumption

2,363,000 MT / yr

Masa Manufacturing

~52% masa flour/dry CMF

Dry Masa Manufacturing (CMF)

Manufacturer	Annual CMF Volume (MT)	Market Share
Azteca Milling (Gruma)	853,000	73%
Bunge	180,000	15%
Ole Mexican Foods	83,000	7%
Dry Corn Ingredients (Cargill)	41,000	3%
LifeLine Foods	19,000	2%
Total	1,176,000	100%

CMF: Corn masa flour

~48% cooked corn/wet masa

Wet Masa Manufacturing

Manufacturers Name	Masa Product Type	Annual Volume (MT)	Market Share
Frito-Lay / Others	Snacks / Taco Chips	446,000	42%
Tortilla Mfr's	Tortillas, Tostadas, Taco Shells	614,000	58%
Total		1,060,000	100%

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Retail Grocers	52%
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Other	7%

Source: Tortilla Industry Association 2021

Retail Distribution

Category	Description	Market Share
Grocery	Kroger, Southwestern Grocery, Albertsons	42.5%
Walmart	Walmart	22.6%
Drug	CVS, Rite Aid, Walgreens	4.2%
Club	BJ, Sams club	4.1%
Mass	Kmart Target	6.1%
Dollar	Dollar General, Family Dollar	3.0%
Military	Commissarys	0.6%
Amazon	Amazon	0.1%
CONVENIENCE	7/11, circle K, etc	16.8%
Total		100.0%

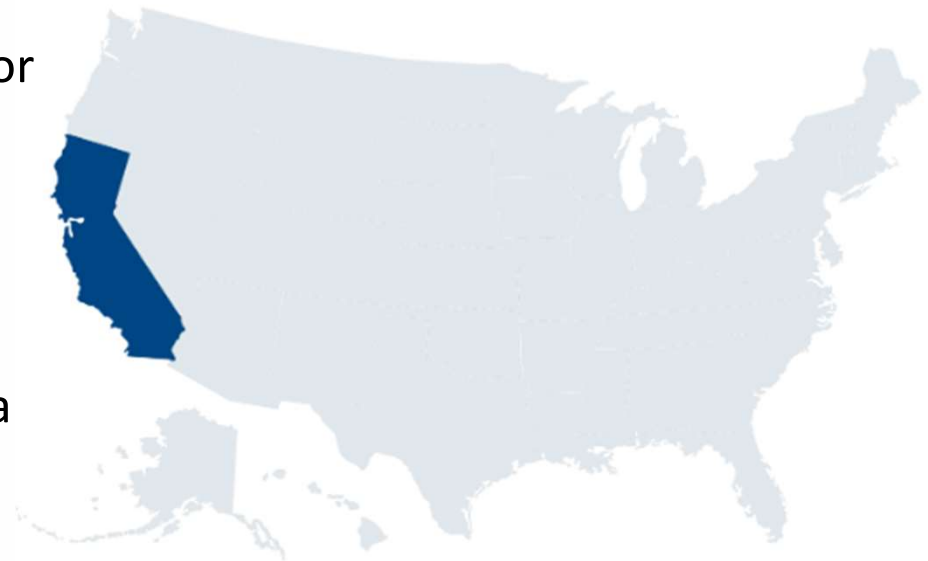
Source: IRI Database

Masa Fortification - State Mandates

- California bill comes into effect on January 1, 2026
- Alabama has passed a bill through Congress, awaiting signature. The language will likely undergo revisions before going into effect June 1, 2026
- Georgia bill moving through committees (Senate currently)
- Oklahoma bill referred to the public health committee
- Interest in Texas, Florida, and New Mexico

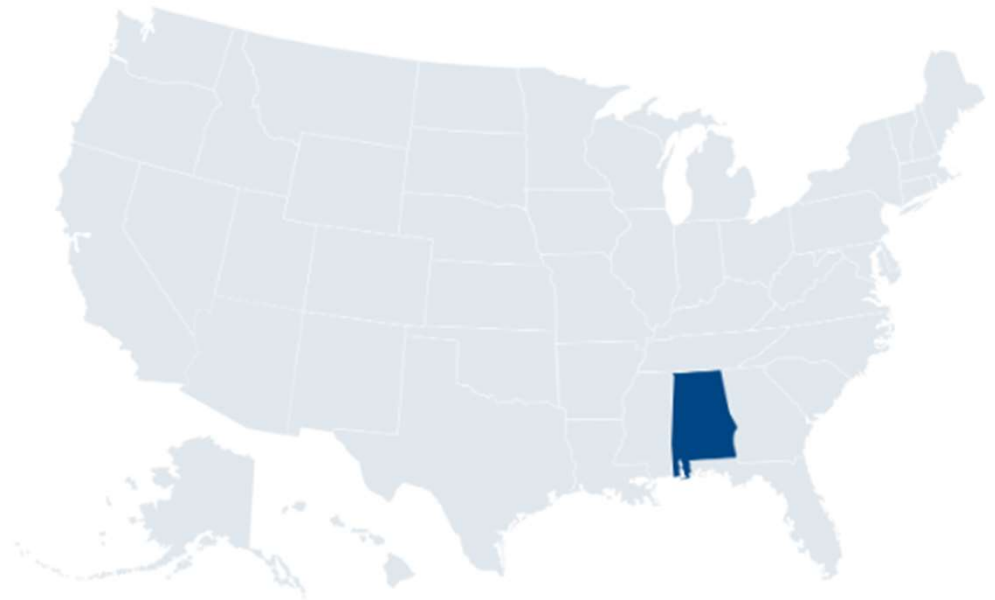
California's Fortification Mandate

- AB 1930 comes into force January 1, 2026
- Corn masa flour mandated and wet corn masa products voluntary
- At a level of 0.7 mg/lb for flour, 0.4 mg/lb for products
- Exclusions:
 - Cottage food operations
 - Food facilities
 - Grocery stores with other fortified masa products
 - Snacks (tortilla chips)



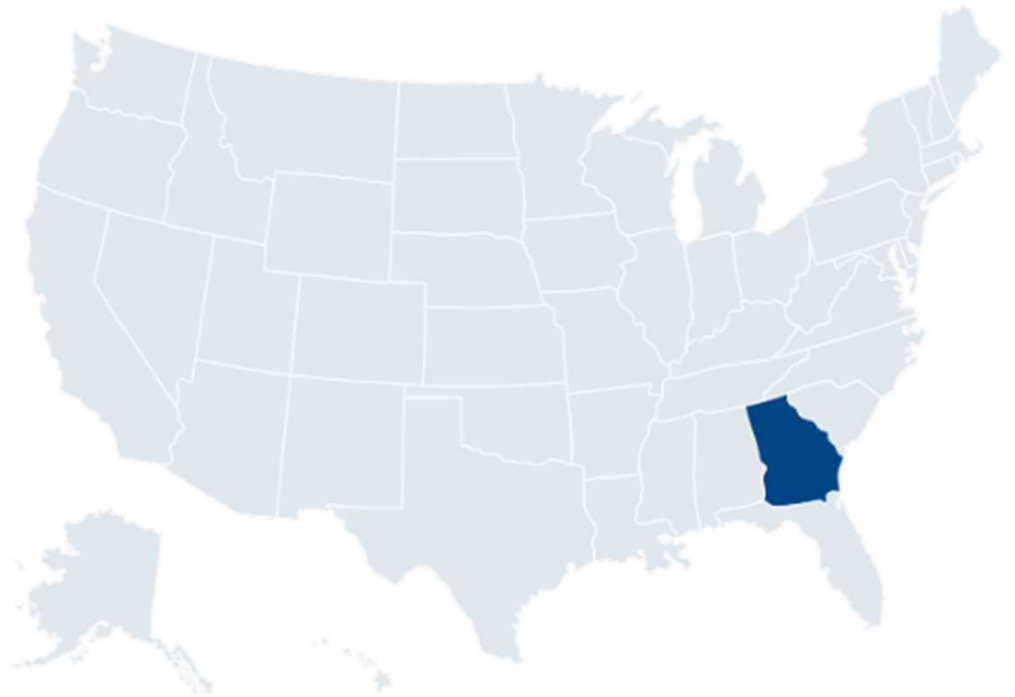
Alabama's Fortification Mandate

- SB 278 has been approved in Congress, will come into force June 1, 2026
- Not less than 0.7 mg/lb for corn masa flour and not less than 0.4 mg/lb for corn masa flour products
- Currently just for corn masa flour and products made from corn masa flour, but will likely be amended to include all masa and allow for process variation



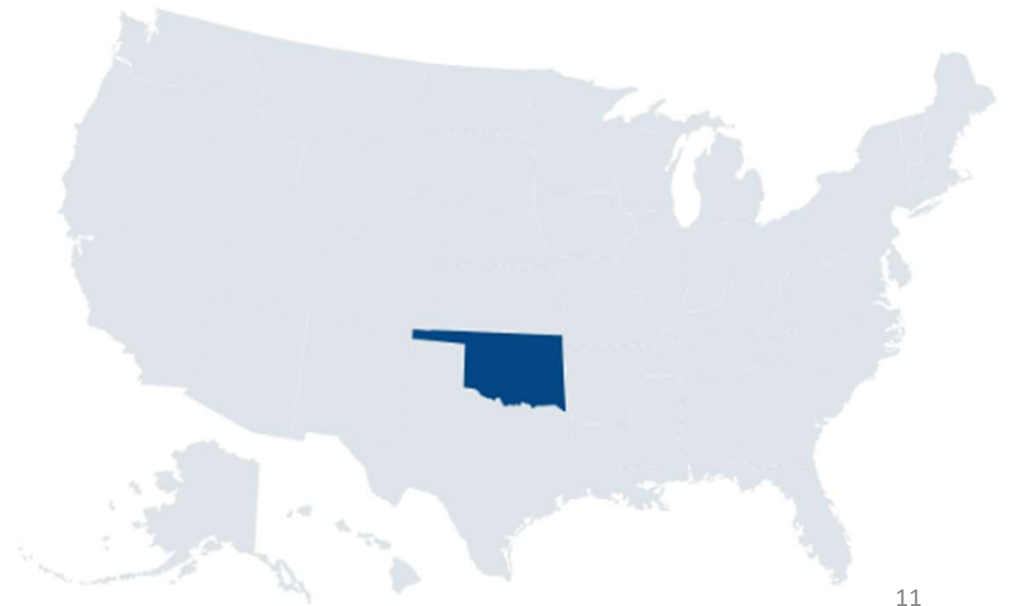
Georgia's Proposed Fortification Mandate – Model Language

- Before senate committee on agriculture and consumer affairs
- At a level of 0.7 mg/lb for flour, 0.4 mg/lb for wet masa products
- Wet masa products defined separately from products made from corn masa flour. Tortilla chips are included.
- Exclusion for small producers and food facilities



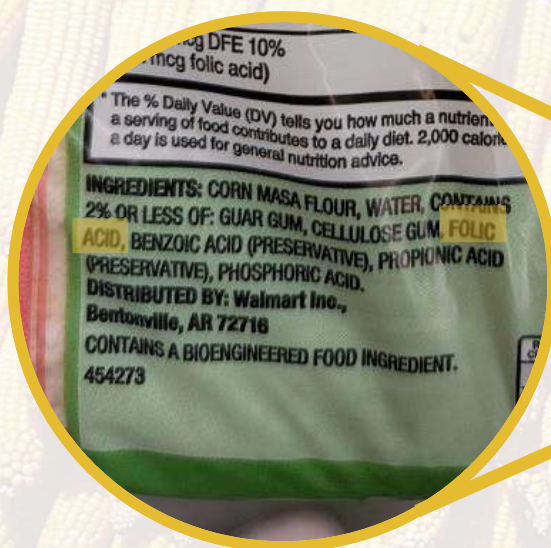
Oklahoma's Proposed Fortification Mandate

- HB 1912 referred to Public Health committee
- Corn masa flour and wet corn masa products
- At a level of 0.7 mg/lb for flour, 0.4 mg/lb for products
- Exclusions:
 - Cottage food operations
 - Food facilities
 - Small-volume operators
 - Snacks



Retailers

- Walmart and Kroger have begun requiring fortification of their house brands



Masa Fortification – Technical Briefs

FFI is drafting technical briefs on:

- Fortification at a corn masa flour facility
- Fortification of vertically integrated corn masa products
- Quantitative testing of folic acid in corn masa

Draft briefs available here:



Photo: Microsoft Stock Photo

Questions?

- As a non-profit public health organization, our concern is getting healthy foods to the population and helping ensure a level playing field for producers
- Feel free to come discuss any comments or concerns

For more information:

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Enhancing Grains for Healthier Lives